



**Universität
Zürich^{UZH}**

Central IT

Microsoft Planner

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Microsoft Planner

- Microsoft Groups vs. Microsoft Teams
- Create a Planner-Plan in Teams
- Tips and Tricks

Groups vs. Teams

Planner is a task planning application. The tasks are sorted thematically and managed in working groups (teams) areas so that all team members can check and maintain the status of the tasks.

Planner plans can be created in two ways:

Microsoft Groups Version

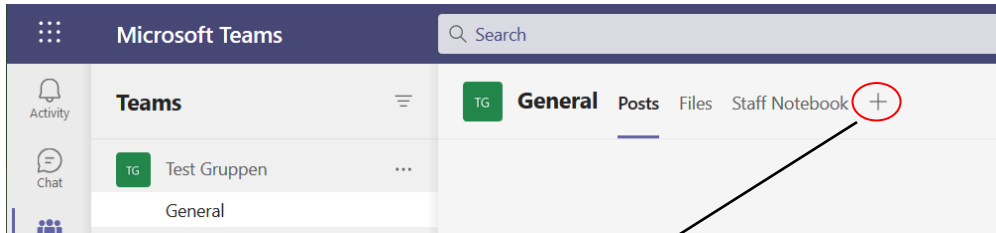
- Microsoft Groups is the current email based collaboration solution
- Creation via <https://portal.office.com> → Planner → New Plan
- No Teams integration

Microsoft Teams Version

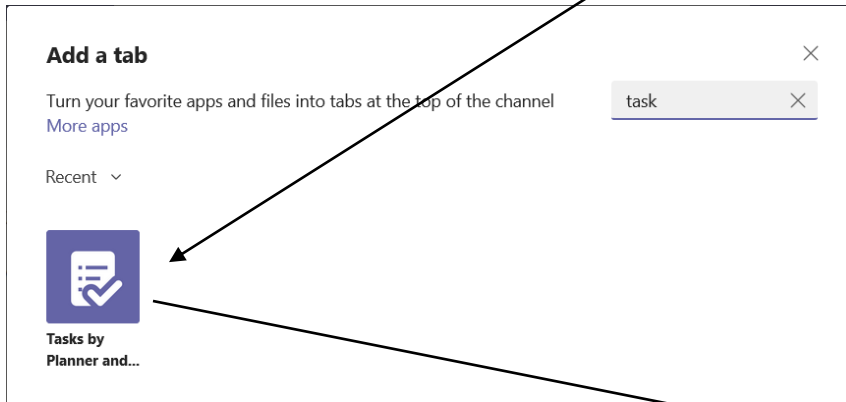
- Microsoft Teams is the new chat based collaboration solution
- Creation via <https://portal.office.com> → Teams → create tab → Planner
- Contains Groups + Teams Version integration

Both versions are (still) fully supported by Microsoft. However, it is recommended to use the new Teams version, which contains all the functions of the Groups version.

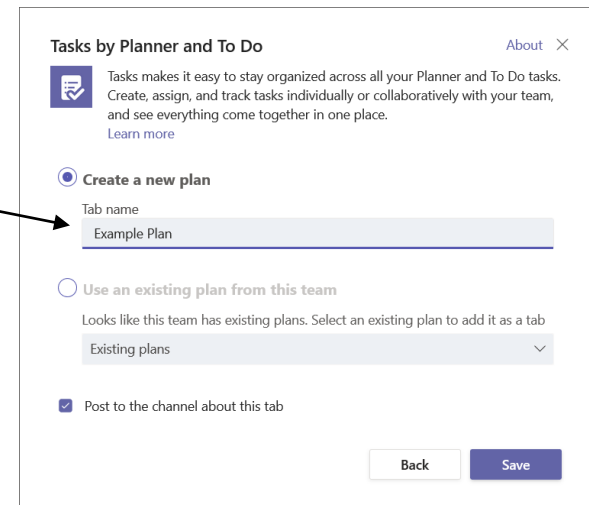
Create a Planner plan in Teams



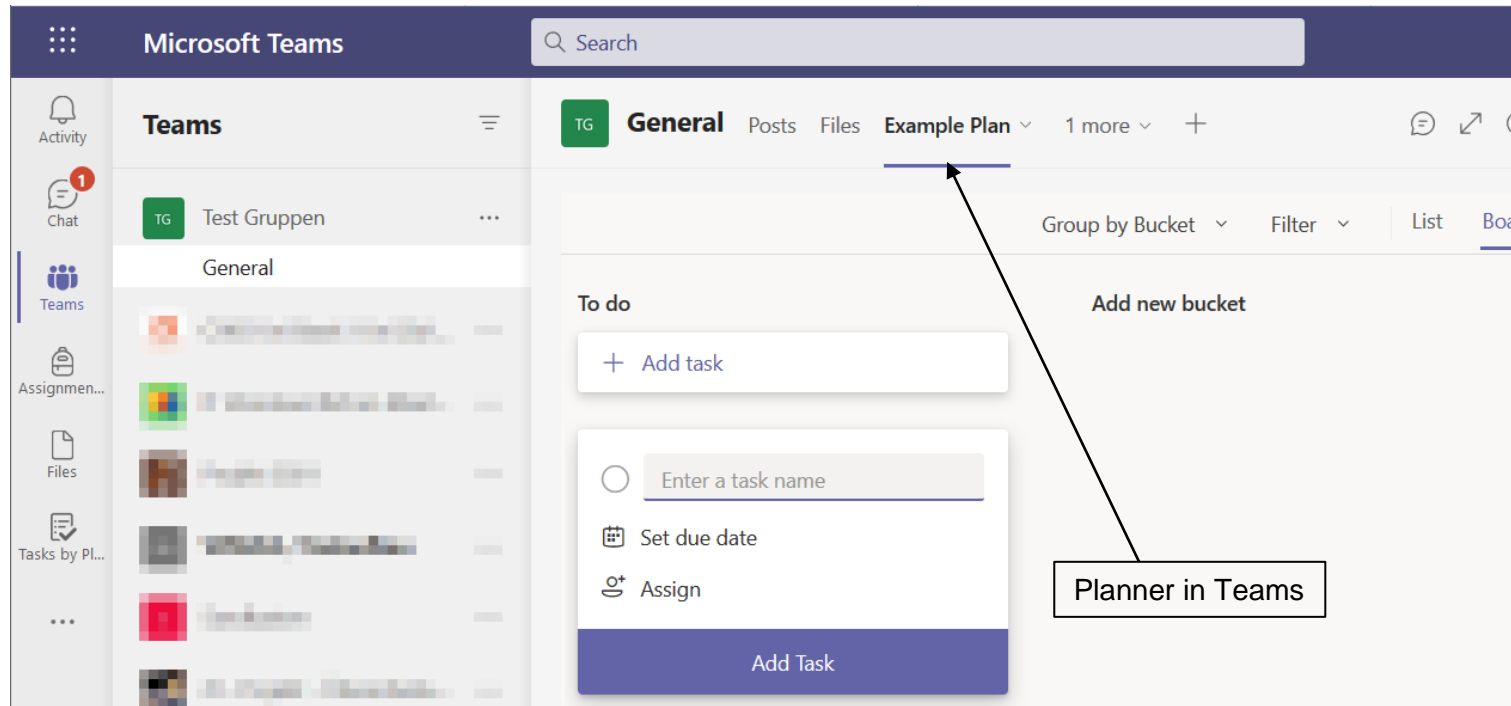
Create a Plan in Teams:
A new plan can be created in any channel using the plus sign.



It is recommended to use a meaningful name, as the tasks of all plans are summarized in overviews.
For example: Project Name or Team Name + Channel Name



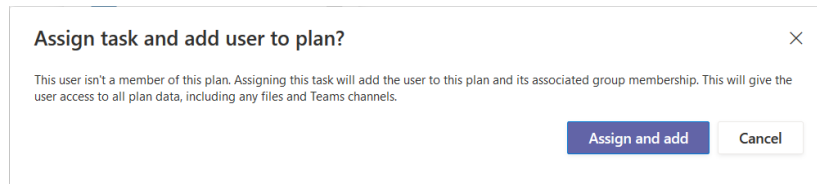
Planner



Planner in Teams automatically inherits the permissions of the team itself. This means that all tasks are visible to all team members. This creates transparency with regard to current activities as well as open and completed tasks. Each team member can create, adapt or assign tasks.

Planner Tasks

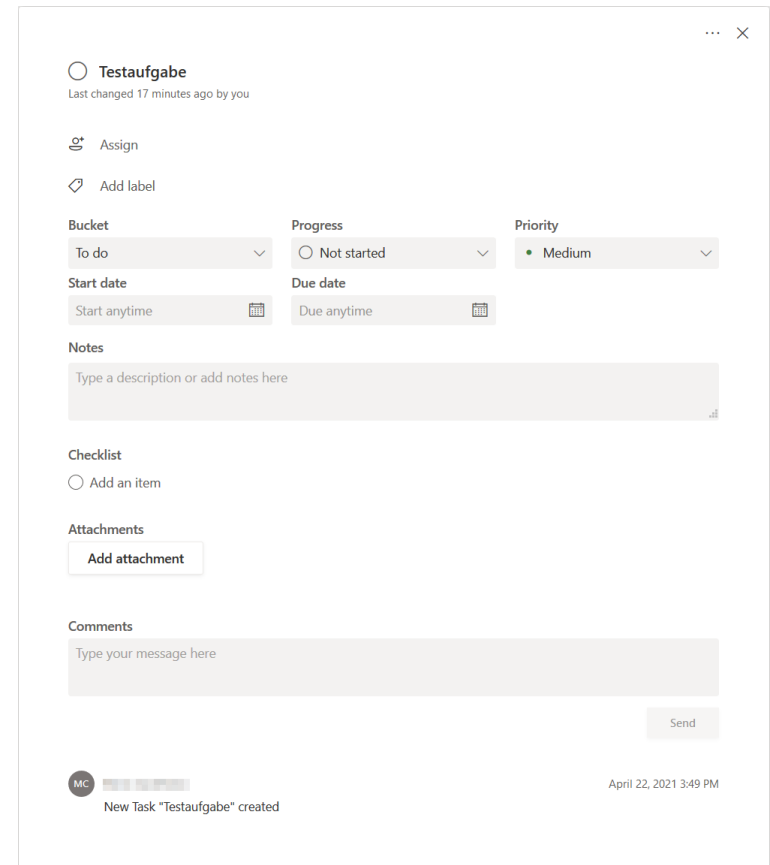
You can assign tasks to yourself or to one or more other team members, or you can [enlarge](#) the team by assigning tasks.



Tasks can be categorized and filtered by [Bucket](#), [Status](#), [Priority](#) and [Color](#).

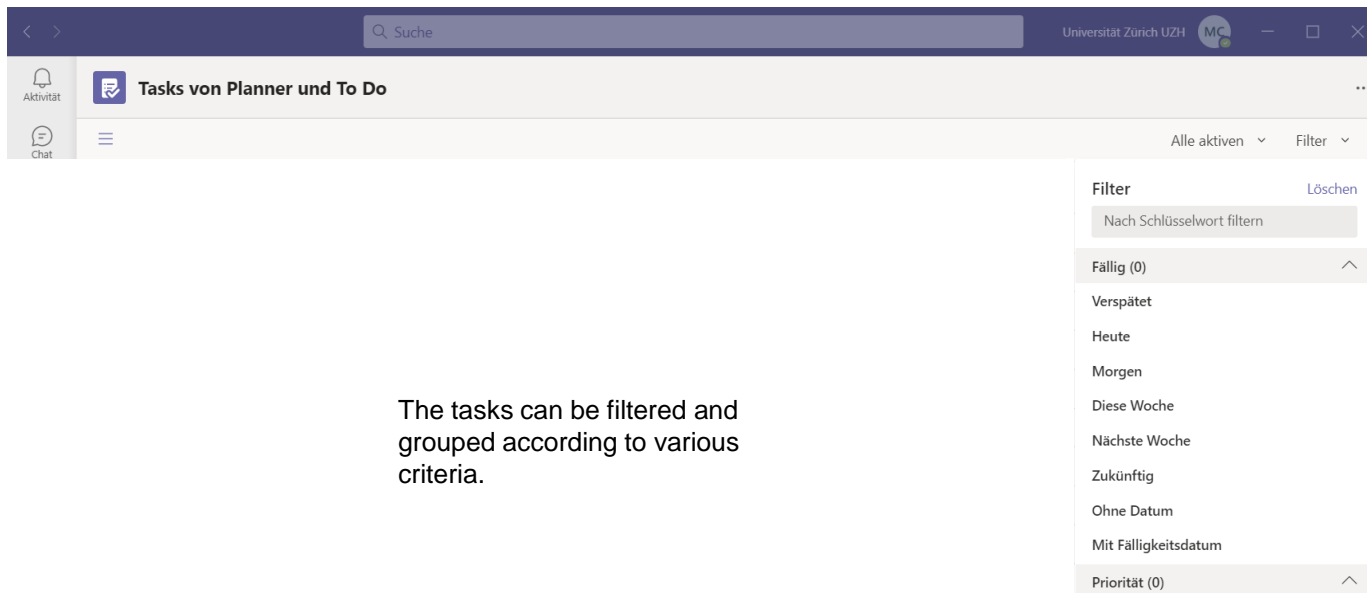
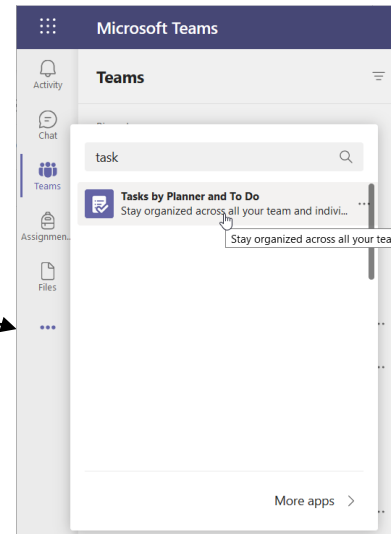
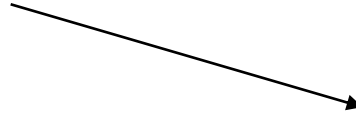
Describe the task details with [Notes](#), with a [Checklist](#) or add [Attachments](#) to the task.

The [Comment](#) function needs Outlook Online and therefore does not currently work at UZH.



Tasks Overview

For an overview of all your tasks, open the Planner app in Teams.



The tasks can be filtered and grouped according to various criteria.

Tasks Overview

You can get various overviews via <https://portal.office.com>.

The screenshot displays the Microsoft Planner interface. The top navigation bar is blue with the University of Zurich logo and the word "Planner". The left sidebar contains navigation options: "Neuer Plan", "Planner-Hub", "Meine Aufgaben", "Favoriten" (with expandable arrows), and "Zuletzt verwendete Pläne" (with expandable arrows). Under "Favoriten", there are three items: "Projekt 1" (pink icon), "Projekt 2" (purple icon), and "Beispiel Plan" (red icon). Under "Zuletzt verwendete Pläne", there are two items: "Beispiel Plan" (red icon) and "Projekt 3" (orange icon).

The main content area shows a welcome message "Willkommen Sven Wissmann" and a section titled "Bevorzugte Pläne". It features two project cards:

- Projekt 1** (pink icon): 32 Aufgaben übrig. Legend: Nicht begonnen... (26), In Arbeit (6), Verspätet (0), Erledigt (4).
- Projekt 2** (purple icon): 18 Aufgaben übrig. Legend: Nicht begonnen... (15), In Arbeit (3), Verspätet (0), Erledigt (4).

Below this, there is a section for "Zuletzt verwendete Pläne" and "Alle Pläne". It shows two cards:

- Beispiel Plan** (red icon): Team Mitarbeiter > Allgemein.
- Projekt 3** (orange icon): > Allgemein.

Email notifications

Di. 10.12.2019 04:48
MP Microsoft Planner <noreply@Planner.Office365.com>
You have late tasks!
An sven.wissmann@zi.uzh.ch

Fr. 06.12.2019 05:47
MP Microsoft Planner <noreply@Planner.Office365.com>
You have tasks due today!
Hi An sven.wissmann@zi.uzh.ch

Do. 05.12.2019 05:13
MP Microsoft Planner <noreply@Planner.Office365.com>
You have upcoming tasks due.
Hi An sven.wissmann@zi.uzh.ch

Microsoft

Hi Sven,
You have 3 tasks due in Microsoft Planner.

Upcoming

- 12/6/2019 [IMLS Legacy Domain umziehen](#)
Absenzen / Abwesenheiten
- 12/6/2019 [Umzug imls.uzh.ch](#)
Aufgaben
- 12/6/2019 [Planner für TL](#)
Aufgaben

This notification is sent by Microsoft Planner.
To change your notification settings, go to Planner for web, choose the gear icon in the top right, and then se

Planner emails reminders for tasks that are due on a daily basis.

Tips & Tricks

Deleting of tasks / plans

Warning:

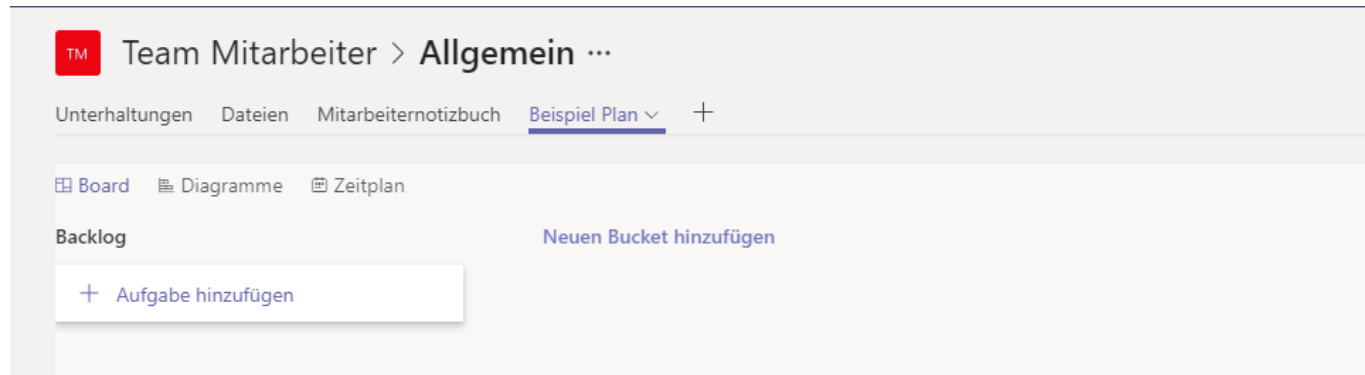
There is **no way to recover** a deleted task. If you accidentally delete a task, you'll need to recreate it from scratch.

(As of April 23, 2021)

<https://support.microsoft.com/en-us/office/delete-a-task-or-plan-39e10e78-13f0-446d-94cd-9e562648497a>

Backlog

The Bucket «backlog» is ideal for collecting open tasks, especially when setting up a new task plan. The tasks can be prioritized or assigned after their creation. Later, the team members can independently take open tasks from the backlog or store new tasks in the backlog, even if the implementation of the task is not yet clear.



Planner on Mobile Devices

iOS

<https://apps.apple.com/de/app/microsoft-planner/id1219301037>

Android

https://play.google.com/store/apps/details?id=com.microsoft.planner&hl=de_CH