

Manage your projects with Office 365 Groups and Planner

IT Showcase Productivity Guide

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Used together, Microsoft Office 365 Groups and Office 365 Planner give you a simple and highly visual way to organize teamwork. Groups let you chat about what you are working on, get progress updates, share files, and see relevant messages in a conversational view, away from your email inbox. Planner shows all your plans in a centralized view and lets you set due dates, assign people to tasks, and track your progress in a chart—all without the learning curve and ramp-up time usually associated with project management software.

Topics in this guide include:

What are Groups?

Communicating with others

Sharing documents with Groups

Using Planner to create plans and track tasks

For more information

What are Groups?

Getting things done at work means sharing information and collaborating across ad hoc groups and project teams. Often, the tools we use to bring people together are different in each app—distribution lists in Outlook, workgroup lists in Skype, groups in Yammer. Office 365 Groups let you easily connect with the colleagues, information, and applications you need to work more collaboratively.

Groups are more than just a replacement for Outlook distribution lists. They offer the next generation in enterprise collaboration by bringing together conversations, document collaboration, and calendar-based event management in one seamless experience.

By combining the best of Microsoft Exchange and Microsoft SharePoint Online experiences with a social conversation model and integrated management functions, Groups offer “one-stop shopping” for all your group collaboration needs. Here are some key points about Office 365 Groups.

Conversations

Group conversations provide a focused workspace for group communication in Microsoft Outlook on the web, away from the traffic of your inbox. Interact with conversations using a modern feed that focuses on content over message structure. You can receive group communications in your inbox if you prefer, which makes it easy to participate by using the email client of your choice.

Documents

Document collaboration with your group has never been easier. Next-generation message attachments let you view documents side by side with your messages, and even support in-line edits without requiring you to leave Office 365. Each group **Files** page provides a dedicated place to store all your group documents so that they are accessible from anywhere—and it is backed by SharePoint Online. Your documents are always one step away in the Office 365 experience, and it is easy to get back to your group/personal inbox and calendar.

Calendars

Office 365 Groups help you to track all your group events in one place, visible to everyone in the group. You can easily visualize how group events will work into your schedule in the Outlook client and Outlook on the web by overlaying your calendar with the group calendar. It is easy to stay in sync with the group rhythm at a single glance, with one-step navigation to your other group collaboration workloads. If you are not using Outlook on the web and your mailbox is in the cloud, group event invites go to your inbox, allowing you to add the group events directly to your work calendar. Check with your Exchange administrator to see if your mailbox is in the cloud.

Group management

Group management is integrated with Office 365, allowing you to manage your group without learning to use a separate security management website. Additionally, Groups support an open permission model, which gives users the ability to add themselves to public groups, reducing management overhead and increasing information availability. For sensitive topics, private groups provide built-in data privacy and offer a mechanism for prospective members to request access to the group.

Groups bring the promise of social collaboration to life in a familiar context, whether you are working in Outlook or Office 365 web-based client apps, the Microsoft Office Mobile apps for tablets and smartphones, or the desktop client apps.

Who can use Groups?

The integrated group messaging and calendar experiences are available to those with a mailbox in the cloud (SDF and SPROD tenants); however, on-premises users can still participate with their preferred email client via standard email messages. Group documents are available via Microsoft OneDrive for Business.

What are group conversations, and why should I use them?

Conversations in Office 365 Groups let you communicate with members of your group in a thread that shows the message history at a glance. New posts appear at the bottom of the conversation. The great thing about conversations is that they are saved in your group, and you can reply either to the whole conversation or to a specific post.

How does Planner work with Groups?

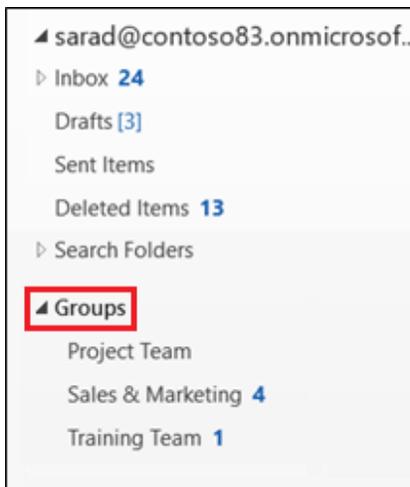
Planner and Groups are integrated to work in unison—in fact, when you create a new group in Outlook it appears in Planner, and when you create a plan in Planner it appears in Outlook as a group. Everything you can do in a group in Outlook you can do in Planner, such as start or view a conversation, work with files and your team OneNote notebook, and manage members. Planner is discussed later in this guide.

Get started with Groups

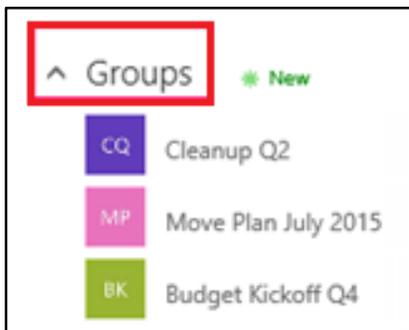
Access Groups through your Outlook mail or from your Planner hub. You will see all the groups you are a member of, along with links to create and browse groups. Explore away! Create a group, and add any user in Microsoft as a member; a welcome email will invite your new group-mates to participate.

Use Groups in Outlook desktop or in Outlook on the web

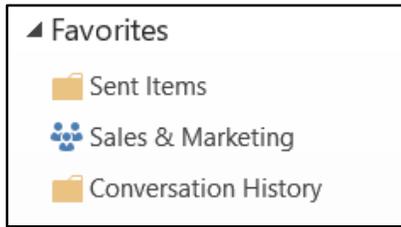
1. In the Outlook client, make sure you are in Mail view.
2. In the navigation pane on the left, select the arrow icon next to **Groups**.



- In Outlook on the web, select **Groups**.



You can add a group to your Outlook favorites by right-clicking it and selecting **Add to Favorites**.



Use Groups on a Windows phone, or on an iOS or Android device

With an Office 365 account and a Windows phone (or an iOS or Android tablet or phone) you use the Outlook Groups app to work with groups. The app for your specific device is available at its app store ([Apps for Windows](#), the [App Store](#) for iOS, or the [Google Play Store](#) for Android).

The Outlook Groups apps are a tailored mobile experience for connecting with existing groups. You can use several Outlook Groups features on these devices, but some, such as creating and browsing for groups, searching conversations, and managing meetings, are not yet available.

See [Compare Outlook Groups on all platforms](#) for a list of the features available for your device.

Join an existing group

To join a group, email a member of that group and ask to be added. Group messages and calendar invites will automatically be sent to your inbox, allowing you to participate in all group discussions and events. The welcome email will give you a link to the group OneDrive for Business site, where you can explore the group documents.

Communicating with others

Use Group conversations to build and keep a thread of conversations between group members. This gives you a complete, chronological view of a group's messages in one place.

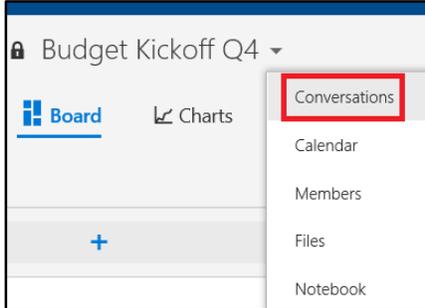
In addition, a group OneNote notebook is available for members to edit at the same time. Store brainstorming information, links, and more. The notebook functions like a wiki where everyone contributes. You can revert a page back to a previous version if necessary.

When you create a group, it also gets its own calendar. Use the group calendar to coordinate group schedules and team tasks.

Create a team conversation

Start a group conversation from Outlook or from a plan Board in [Planner](#):

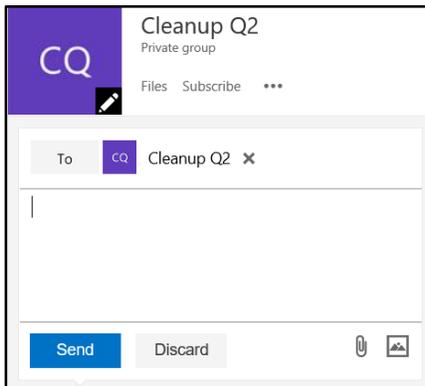
1. Select the arrow next to the plan name, and then select **Conversations**.



A new **GroupMail** page appears in a new browser window or tab.

2. In the middle of the page, select **Start a group conversation**.

A new message box appears.



3. Type your message. You can also insert a picture or attach a file or email.
4. Select **Send**. Conversation messages will show up in your Outlook inbox and on your group mail page.

Work with a group calendar

Group members can use the group calendar to set appointments and meetings, just as they would with any other calendar in Outlook. All group members have access to the calendar.

1. Above the project task pane, select the ellipsis (...).
2. Select **Calendar** to show the group calendar.

A new Outlook page appears in a new browser window or on a new tab, with the group team calendar selected.

Sharing documents with Groups

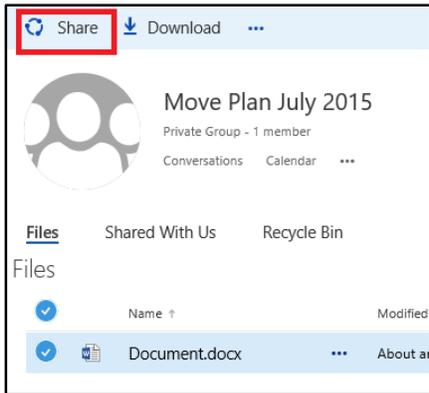
Groups provide a place to store, sync, and share your work files. Backed by SharePoint Online and accessed through OneDrive for Business, Groups let you update and share your files from anywhere. You can also work with other people on the same Microsoft Office documents at the same time.

To work with your group files in SharePoint Online

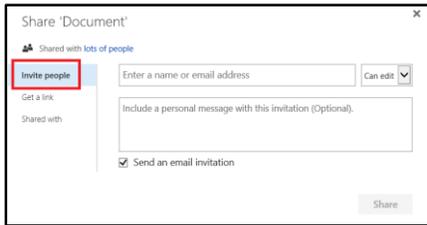
1. In the **Board** view, above the plan task pane, select **Files**.
The **Group Files** page appears in a new browser window or on a new tab.
2. In the middle of the page, select **View group files**.
Group members can upload, download, and edit files on this page.

Share documents or folders from Groups

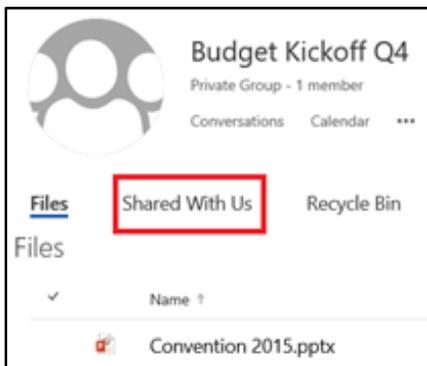
1. Go to the group that has the document or folder you want to share.
2. Select the file you want to share, and then select **Share**.



3. In the **Share** dialog box, select **Invite people**, and then type the names or email addresses of people or groups you want to share the document or folder with. As the person's or the group name appears below the box, select it. Start typing again to invite more people or groups.



If a file is shared with another group, in that group document library, the shared file appears in the Files list on the **Shared With Us** tab.



4. Select a permission setting: **Can edit** or **Can view**.
5. If you want, you can type a message to include in the email that goes to all invitees. This email includes a link to the shared document.
6. If you do not want to send an email, clear the **Send an email invitation** check box.
7. Select **Share**.

See who you are sharing a document with

1. Select the document, and then select **Share**.



2. In the **Share** dialog box, select **Shared with**.

The names of the people you are sharing the document with appear on the right.

3. If the names of the people you are sharing with do not all fit on the card, select the **More** link at the end of the list of names. You can then scroll to see all the names.

Using Planner to create plans and track tasks

Planner lets you put your plans in motion. Easily build teams, share goals, and track progress to get work done together—anywhere, on any device.

Bring focus to your team with the Planner Board

Organize and divvy up plan tasks using the Board. You can set start dates and due dates, set progress status, and assign people to tasks. You can also keep track of working groups for virtual teams, feature crews, ship goals, and action items.

Map out your plan

Before you start using Planner to create your plan, keep the following in mind:

- Determine what the goals of your plan are, and set an overall plan start and due date.
- Come up with discrete tasks that have start and due dates, and set the order of the tasks.
- Decide who should work on those tasks.
- Check the availability of those people for the tasks.
- Gather or create the documents you will need to share with your team.

Now that you have mapped things out, it is time to create and build out your plan.

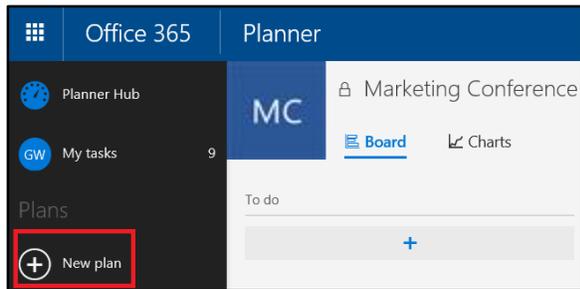
Add a new plan

You add plans from the Planner home page in Office 365.

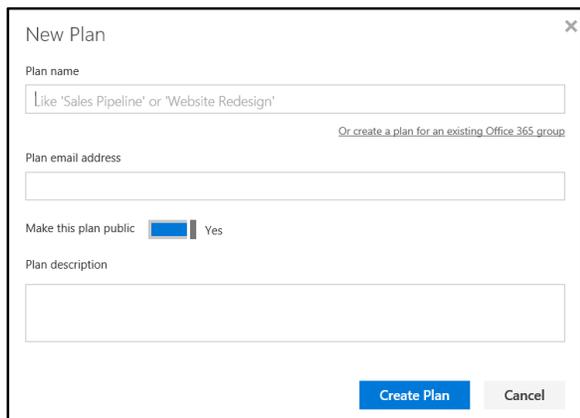
1. Sign in to Office 365 at <http://portal.office.com>, select the app launcher , and then select **Planner**.



- Under **Planner Hub**, select **+ New plan**.



The **New Plan** dialog box appears.



- Do one of the following:
 - To create a plan for an existing Office 365 group, under the **Plan name** box, select **Or create a plan for an existing Office 365 group**. Then choose the group you want, and create the plan.
 - To create a new group dedicated to the plan, give your plan a name and description in the **Plan name** and **Plan description** boxes.
- Set the **Make this plan public** toggle option to **Yes** or **No** to control who can see your plan.
- Select **Create Plan**.

As each plan is created, it is also set up as an Office 365 group and includes:

- A SharePoint Online document library, set up with appropriate permissions.
- A group mailbox for email and conversations.
- A group calendar.



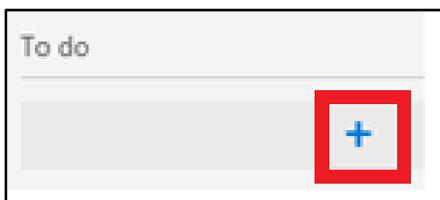
Add and customize tasks

Now that you have created your plan, it is time to build it out. This is where you add tasks, set their start and finish dates, and assign the tasks to people.

1. If you do not see your plan, select **Planner** to go to your Planner home page. This includes the Planner Hub, showing all your plans in one place. A donut chart for each plan gives you a quick view of its status. The chart shown here has four tasks in various progress states: Not started (gold), In progress (blue), Complete (green), and Late (red).

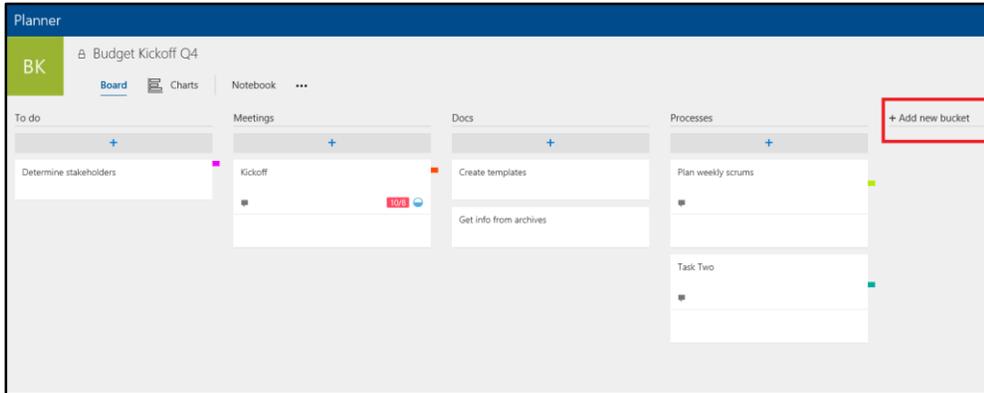


2. Select your plan, select the plus sign (+) under **To do**, and give the new task a name.

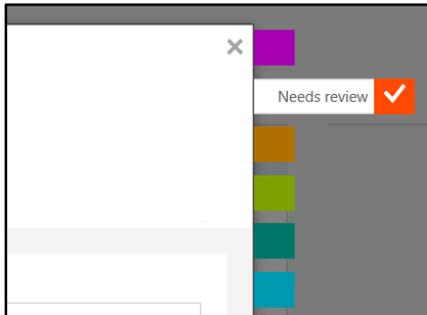


3. Select **Add**.

Each task has its own “card,” which you can move between the default **To do** bucket and any other custom buckets you create to organize your tasks. Buckets are a great way to organize your tasks by week, by task type, by priority, or whatever criteria suit you. Select **New Bucket** on the Board page to create a new bucket.



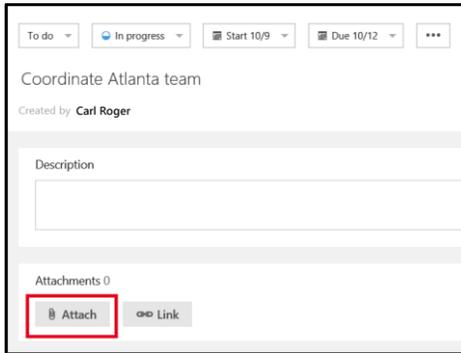
4. If you want, you can set a due date, upload a file or photo, or assign someone to a task. You can do one or all of these right away or you can wait until later if you are not ready yet.
5. You can categorize your task cards by adding a colored label that flags it for action or attention. Open the task card for editing, choose a label color, and enter your custom text. That text shows up as a tooltip when you move the pointer over the label.



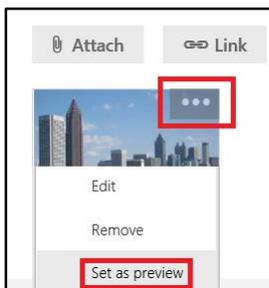
Attach pictures, files, and hyperlinks to a task card

On your task card, you can bring your task cards to life with a picture by uploading an image. Keep your files close at hand by attaching them to the task card, or add useful links to the web.

1. Open the task card for editing.
2. To attach a picture, select **Attach**, and browse to the image you want to upload. The image file will be saved to the document library.



3. To set the image as the preview picture for the task card, select **Other Commands** (three dots) in the upper-right corner of the image and choose **Set as preview**.

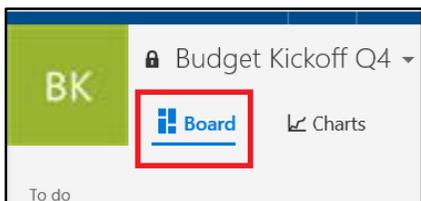


4. To add a document to your plan, select **Attach** and browse to your file. After you attach the file, it is available from the task card when the card is open for edit. On the task card, select the attachment icon (a paperclip) to open the task card. To open the document for viewing or editing in its Office Online app, select its name (a text link) under its preview image.
5. You can also add a hyperlink by selecting **Link**. Type the link text and enter the web address. The text you type for the link will appear as a hyperlink under the link icon.

Add people to your plan

If you are working on your own but want to share status with your manager or other stakeholders, you can add people to your team without assigning work. Or, if you have added tasks to your plan but have not yet assigned people to those tasks, you can assign those people now.

1. If you do not see your plan, select **Planner** to go to your Planner home page.
2. Select your plan. Your plan appears on the **Board** tab.

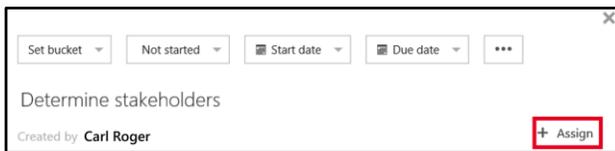


3. In the pane on the right side, select **Add Members**, and then start typing a name in the box. Type-ahead is enabled, so you might need to type just the first few letters.
4. When you find someone you want to add to your plan, select his or her name, or press Enter.

Assign someone to a task

Keep in mind that you can assign only one person to a task at a time. As your plan progresses, you can assign another person to take over that task as needed.

1. Select **Board** to switch to the Board view.
2. If a person is a member of the plan group, you can drag their picture from the upper-right area of the page to the task. If not, continue to step 3 to assign that person. Assigning a person to a task adds them to the plan and its group.
3. If the person you want to assign to the task isn't a member of the plan, select the task.
A new window appears, showing the details for the task.
4. Select **+ Assign**.



5. Select **Add someone new** and then enter the person's name or email address to find him or her.
After you assign a person to your task, his or her name appears on the card for the task.

Set the progress status for a task

As your team members work on their tasks, you will want to look at or update their status.

1. Switch to **Charts** view, and then select the task.
A new window appears, showing the details for the task, including the status. A new task will have the **Not started** status, as shown here.



2. In the box, select the **Not Started**, **In Progress**, or **Completed** status.

As the status changes for a task, its color changes:

- A new task, by default, is set to **Not started** and its color is gold.
- A task that you set to **In Progress** changes to blue.
- A task that you set to **Completed** changes to green.
- If a task due date has passed, its status changes to **Late**, and its color changes to red.

When you are done with a plan

Before you think about deleting a plan, keep the following in mind:

- When you delete a plan, you also delete its group and its conversations, its document library, notebook, and other related information.
- If you really do want to delete your plan, consider creating an archive of your work by copying the dashboard status and the text of conversations, and saving any related documents—or whatever practices work best for you.

For more information

Video: Introducing groups in Office 365

<https://support.office.com/en-US/Article/Video-Introducing-groups-in-Office-365-76cc8193-9554-4f85-8c76-bd151763b6e7>

Find help about groups in Office 365

<https://support.office.com/en-US/Article/Find-help-about-Groups-in-Office-365-7a9b321f-b76a-4d53-b98b-a2b0b7946de1>

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