

# Tech Tip

## Create a New Plan in Microsoft Planner

MODERN OFFICE

### Create a new plan in Microsoft Planner

1. Open **Planner** in your browser.
2. Select **New plan** in the left pane.
3. Type a name for your plan in the **Plan name** field.



New Plan

Marketing Plan

Add to an existing Microsoft 365 Group

This will automatically create an email address for your plan which you can use for discussions with plan members.

4. Next you can choose to add the plan to an existing Microsoft 365 group or skip if you want to create a new group.



Marketing Plan

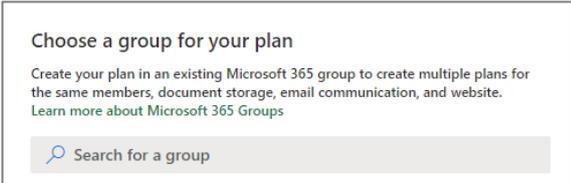
Add to an existing Microsoft 365 Group

Privacy

Public - Anyone in my organization can see plan contents

Private - Only members I add can see plan contents

If you choose to add the plan to an existing group, search and select the group.



Choose a group for your plan

Create your plan in an existing Microsoft 365 group to create multiple plans for the same members, document storage, email communication, and website. [Learn more about Microsoft 365 Groups](#)

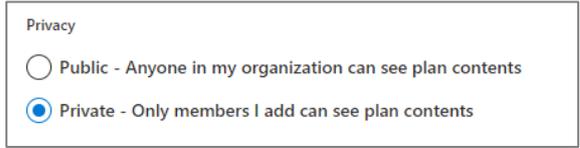
Search for a group

**Note:** If you don't add the plan to an existing group, Planner will automatically create a new Microsoft 365 group.

5. Next you can choose whether to make your plan **public** or **private**.

If you make the plan **public**, it will be visible to anyone in your organisation.

If you make the plan **private**, it will only be visible to the invited plan members.

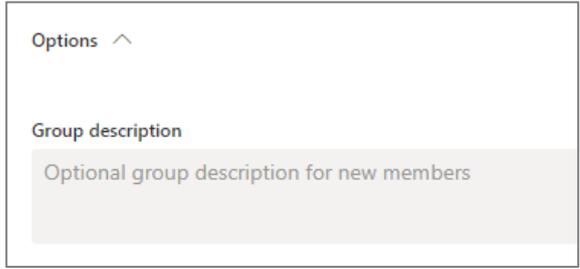


Privacy

Public - Anyone in my organization can see plan contents

Private - Only members I add can see plan contents

6. Lastly, you have the option to add a unique description that will be visible to all plan members.



Options ^

Group description

Optional group description for new members

7. Select **Create Plan**.

### Add people to the plan

1. To add people to your plan, select **Members** in the upper-right corner of the **Planner** window.

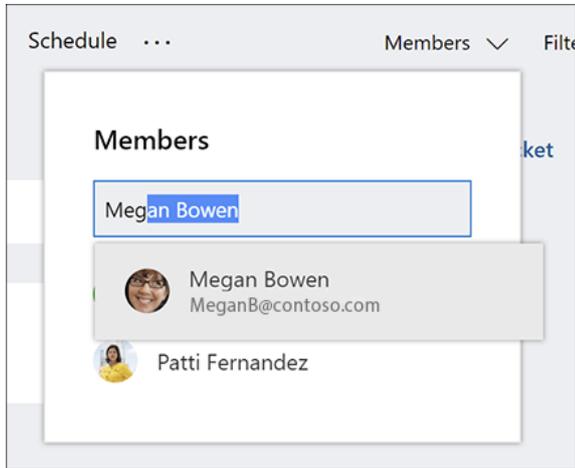
#### About us

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2. Start typing the **name** or **email address** of the user in your organisation you want to add.
3. Select the **user** when it appears.

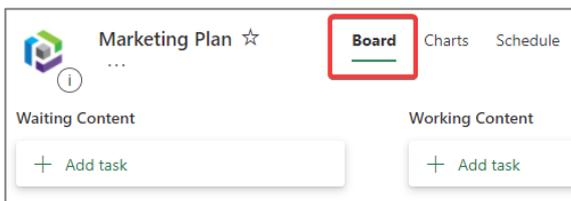


The user will now be added as a member to your plan and can be assigned tasks.

### Create buckets for tasks

In your plan, you can create buckets to organise tasks into categories such as workstreams, project phases, or topics.

1. Ensure your plan is displayed as **Board** view. Navigate to the top right of your plan to check the set view.



2. Select **Add new bucket**.

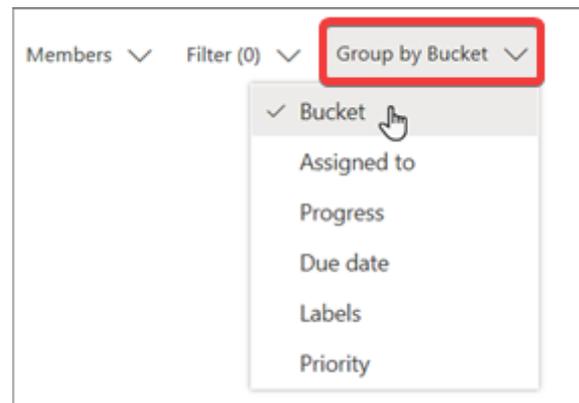


3. Type a name for your new bucket and select **Enter**.

### Change the task grouping

You can change the task grouping to highlight different aspects of your plan. For example, you can sort your tasks by bucket, progress, due date, or labels.

1. To change the task grouping, select **Group by** in the top-right corner of the plan board.
2. Select one of the options.



Your tasks will now be sorted according to your selection.

### What is Microsoft Planner?

Microsoft Planner is an app available in the Microsoft 365 suite designed to track tasks and activities. Planner is accessible on desktop, mobile and web devices.

#### About us

365 Architechts is a technology company based in Brisbane, Australia. We deliver solutions to support organisations on their digital transformation including cloud, modern applications, cybersecurity and artificial intelligence to drive profitability, growth and achievement of strategic objectives.  
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