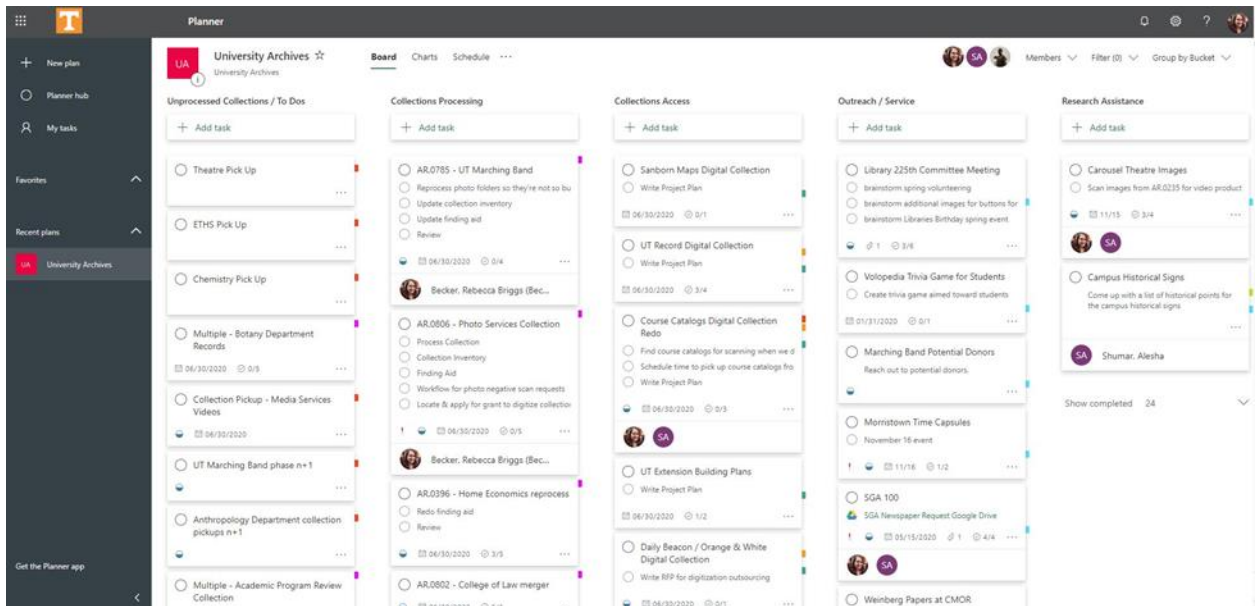


Microsoft Planner

<https://tasks.office.com>

Reviewed by Becky Briggs Becker, Editor-at-large

Planner is the task management web-based application available in Microsoft Office 365 premium, business, and educational subscription accounts. Microsoft initially released Planner in 2016 as an alternative to its decades old, separately sold, and more complex project management tool known as Project.¹ Following the blueprint established in other project management web tools such as [Trello](#), [Asana](#), and [AirTable](#), Planner builds its project management and organization framework from the [Kanban](#) board, a workflow visualization tool much like a whiteboard covered in Post-It notes. The main differences between Planner and its sibling web tools is that each tool uses different terminology to describe how its virtual whiteboard works, and while Trello, Asana, and AirTable have free versions and subscription versions, Planner only comes bundled in a subscription package.

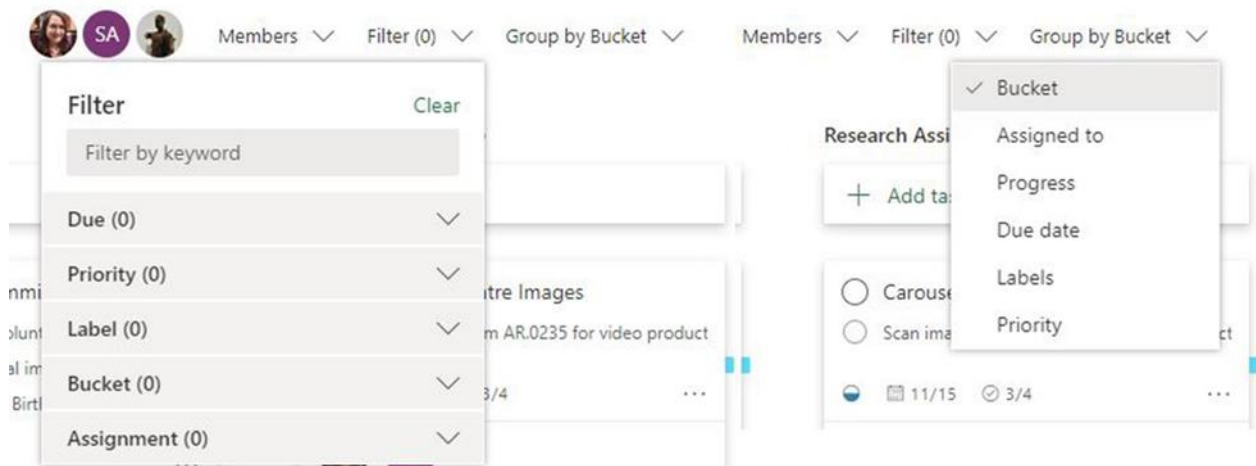


Screenshot of a Microsoft Planner user board, called a Plan.

Planner’s initial screen displays all the user’s boards (called “Plans”) that represent the user’s projects. Once the user clicks through to the Plan, it displays a project

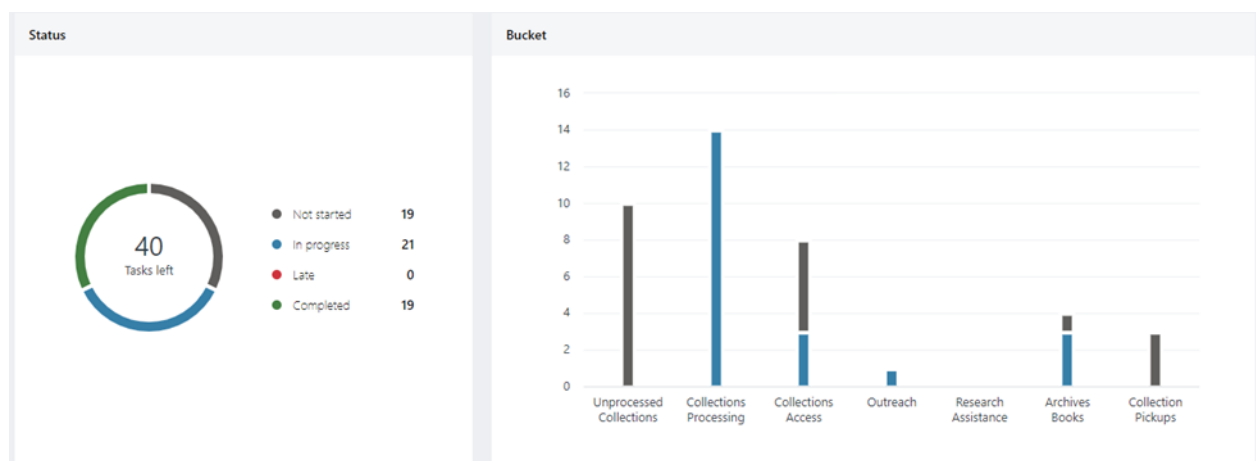
¹ Sarah Perez, “Microsoft Officially Launches Planner, Its Trello Competitor,” TechCrunch. Last modified June 6, 2016, <https://techcrunch.com/2016/06/06/microsoft-officially-launches-planner-its-trello-competitor/>.

board organized by columns (called “Buckets”) and cards (called “Tasks”). Users have access to customizable view filters to represent whatever kind of data the user desires to see, such as progress or tasks assigned to Plan members.



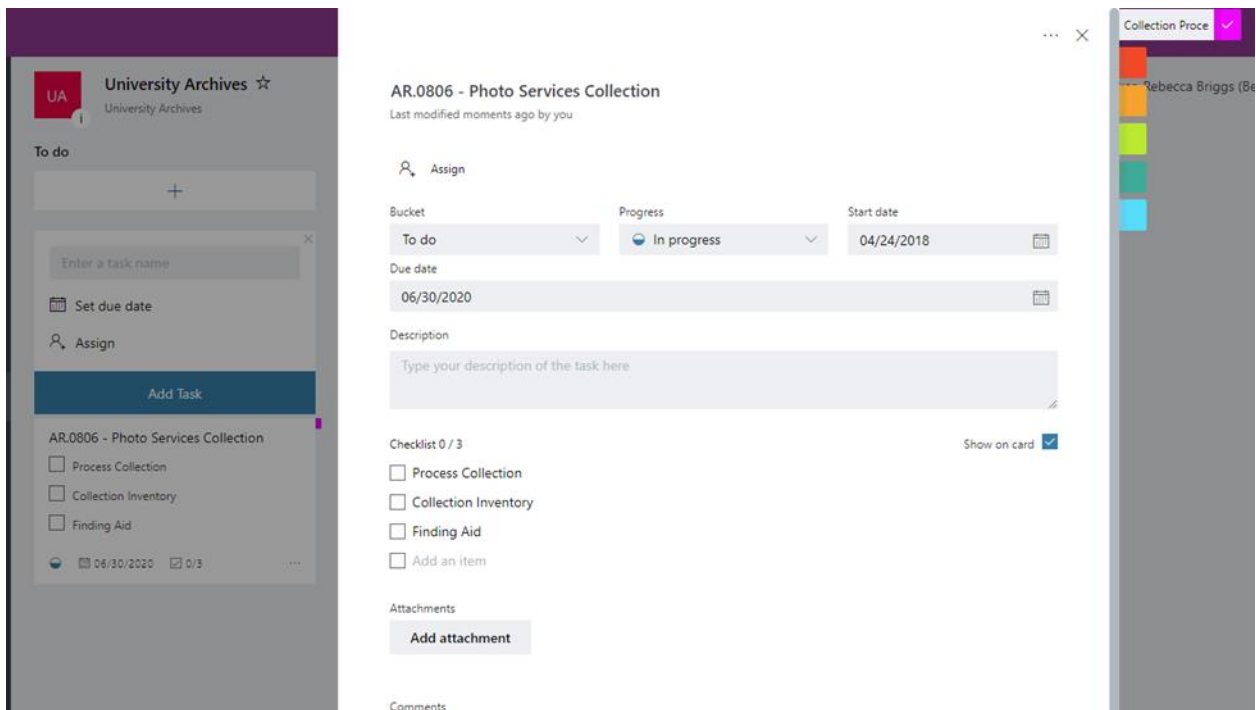
Dual screenshot of Filters (left) and Group By choices (right).

Each Task is customizable to show its progress status, priority status, start and due dates, descriptions, checklists, attachments (including files, links, and SharePoint items), and comments. The user can copy the Task, copy a link to the Task, or delete the task. The user can also apply color-coded labels, as well as receive email notifications regarding due dates or any changes made to the task. One benefit of using Planner is that the archivist can assign multiple Plan members to a Task card. New Plan users can be added via email. Institutional subscribers to Office 365 benefit from searching for Plan members by name, supplied by their institution’s prepopulated Outlook directory.



Screenshot of the Charts view in Planner

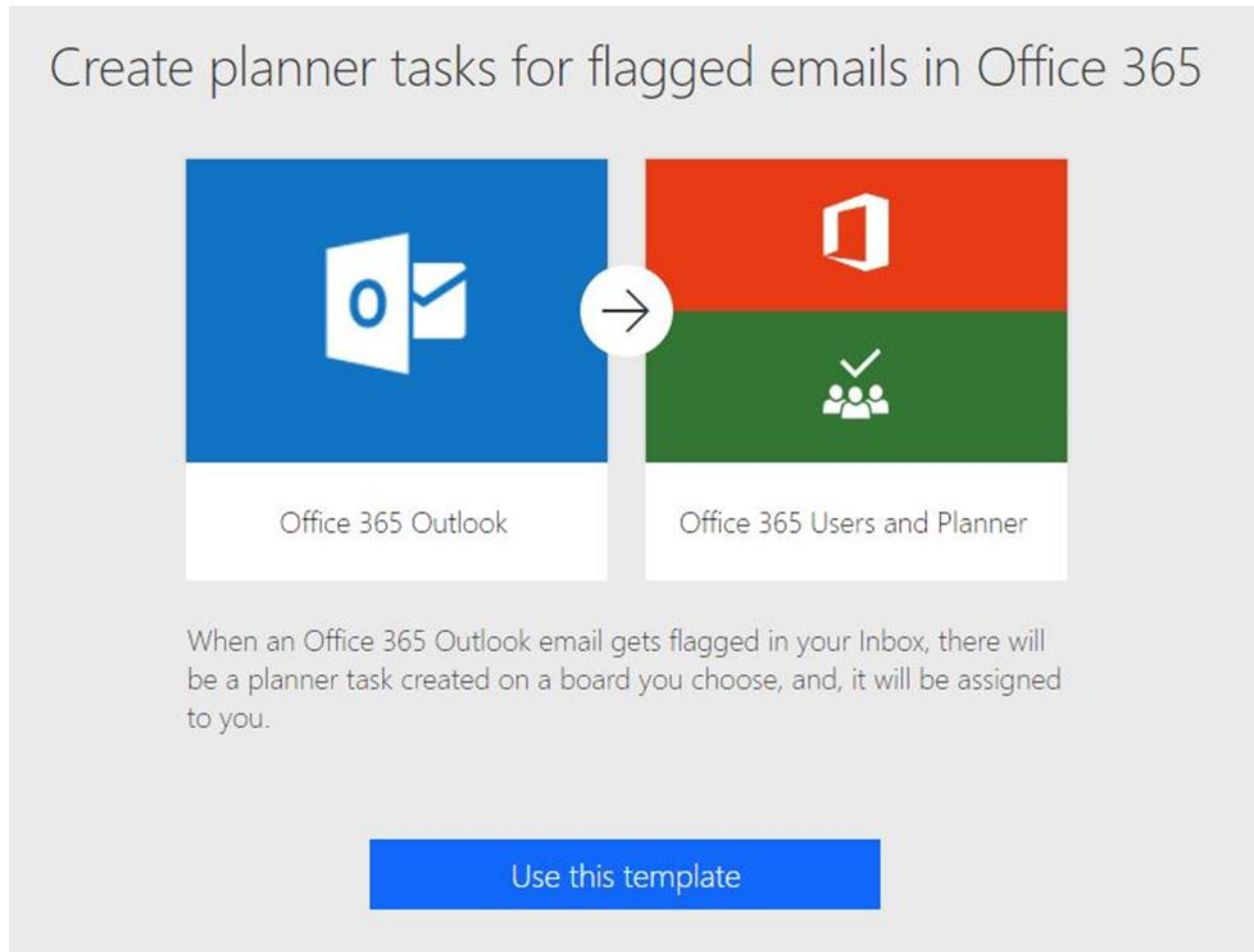
Planner's main departure from other project management apps like Trello or Asana is its visual representations of data gleaned from the buckets, tasks, group member assignments, and labels in the Plan view. Additional views include Charts, Schedule, Conversation, Members, Files, Notebook, and Sites. Charts and Schedule are unique to Planner as they display bar graphs, circle graphs, and a calendar created from tasks and labels to show project progression. Conversation, Members, Files, Notebook, and Sites are integrated features from existing Office 365 apps, including Outlook, Groups, SharePoint, and OneNote. If an archivist's institution already subscribes to Office 365, then one already has access to all of Planner's features and integrations with other Office products.



Screenshot of a Task card.

The visual differences and additional features make Planner an upgrade over Trello and Asana's free-to-use versions for tracking archival collection processing projects, archival reference questions, and event planning. Rather than moving tasks across buckets to signify progress, each task card includes a progress drop-down box, a start date, and a due date. These built-in features are especially useful for tracking with definitive deadlines in mind, such as grant-funded archival processing projects, reference questions, and events. Buckets can be titled by project topic rather than progress, a departure from the traditional Kanban board organization scheme and a way to consolidate different projects of the same departmental unit at an institution into one Plan rather than creating several. When the archivist completes a task, one can choose "Completed" in the progress drop-down box and the task will by default hide itself at the bottom of the bucket column, decluttering itself from "In Progress" and "Not Started" tasks. One can also customize what is displayed on each task in a

bucket. For example, for tasks with multiple steps, the user can create a checklist and then check “Show on card” to display the checklist. The user can also choose to display the task’s description or attachments as well, but only one of these items can be displayed on a task in bucket view at a time.



Screenshot of a template for creating planner tasks for flagged emails in Office 365 Outlook.

Planner does have drawbacks in that it does not have features that are readily available in Trello and Asana. For example, Asana has the built-in “trick” that allows one to create recurring tasks. However, in order to implement the trick in Planner, the archivist would need to use Microsoft’s companion automation product, Flow, to program the recurring task.²³ While Flow includes templates for common Office 365

² “Create a Planner Task Every Month on a Recurring Basis,” Microsoft Flow, accessed October 21, 2019, <https://flow.microsoft.com/en-us/galleries/public/templates/3ea9a3eae7044dc496b619cbcad0afc4/create-a-planner-task-every-month-on-a-recurring-basis/>.

³ Rob Quatela, “Create Recurring Tasks in Microsoft Planner Using Microsoft Flow,” Medium, last modified July 30, 2018, <https://medium.com/@rob.quatela/creating-recurring-tasks-in-microsoft-planner-using-microsoft-flow-f605814734df>.

products, it took the reviewer's coworker a full workday to program a recurring task in Planner using Flow.⁴ Archivists savvy in computer programming may see Flow automation as an added step to using Planner, but general users may be more attracted to a premium account with Asana that removes the barrier entirely. Another missing feature in Planner can be found in a free Trello account. Trello users are familiar with being able to send emails to a Trello email address to add cards to their Trello boards. However, to use this feature in Planner, the archivist would need to use an add-on through Outlook. If the archivist does not have administrative approval to use add-ons from her institution's IT department, then that feature is locked. Another drawback in Planner is the lack of templates, which Trello and Asana both include. While Trello and Asana's templates cater to broader audiences in the business and software development fields, any sort of starting point such as a project management Plan would benefit Planner's beginner users. Smaller differences, such as the ability to clone checklists in Trello versus not being able to do so in Planner, add up to warrant an archivist to do some comparison shopping and testing before committing to any project management app.

⁴ Amanda Richards, interview by author, Knoxville, Tenn., September 6, 2019.