
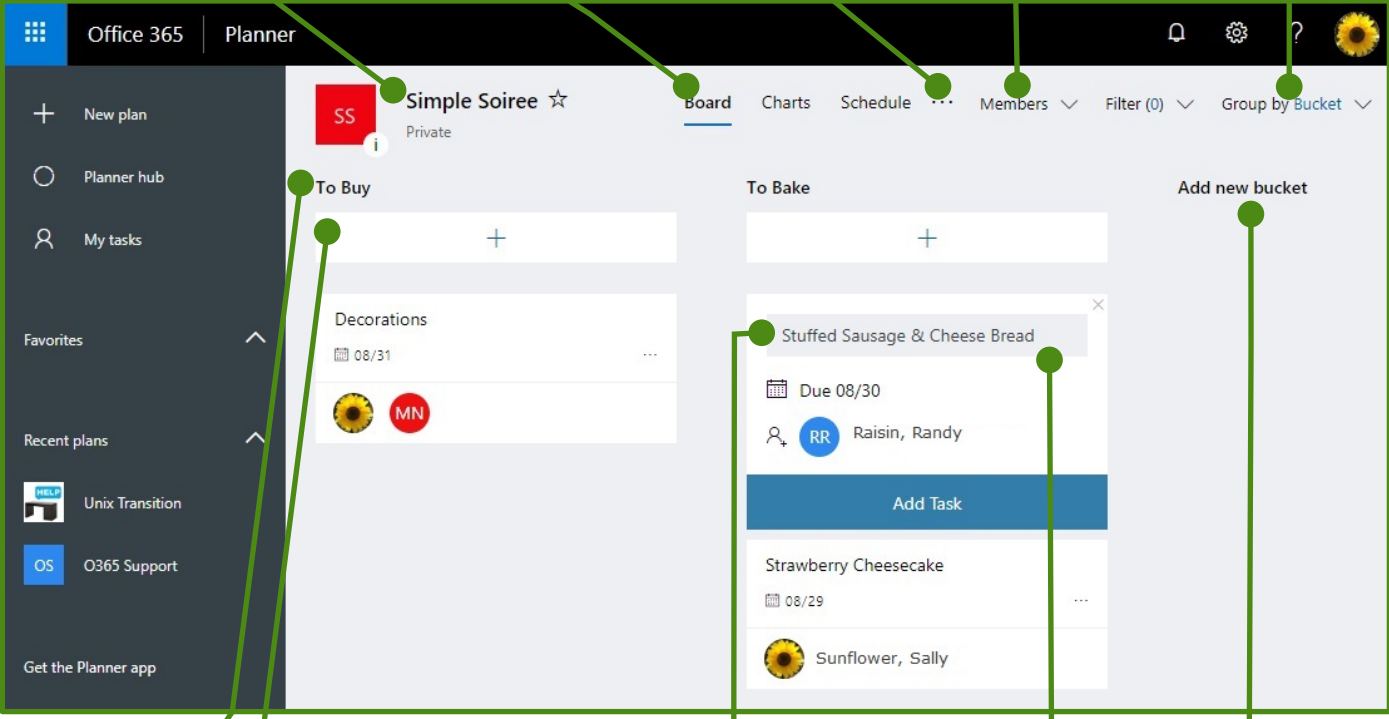


## Sign in and open

1. Use any browser to open the WPI portal at <https://portal.wpi.edu>.
2. Sign in using your WPI email address and WPI password.
3. Select the Office 365 app launcher  at the top left of the portal.
4. Select the **Planner** tile in the app launcher.  
Note: If you don't see the Planner option, you may need to select **All Apps** or **Explore all your apps** to find it.
5. Click **Recent Plans** or **All Plans** to choose a plan.



## Using Planner



The screenshot shows the Microsoft Planner interface for a plan named "Simple Soiree". The interface includes a left sidebar with navigation options like "New plan", "Planner hub", "My tasks", and "Favorites". The main area displays tasks organized into buckets: "To Buy" (containing "Decorations" due 08/31) and "To Bake" (containing "Stuffed Sausage & Cheese Bread" due 08/30 assigned to "Raisin, Randy" and "Strawberry Cheesecake" due 08/29 assigned to "Sunflower, Sally"). A third bucket "Add new bucket" is visible on the right.

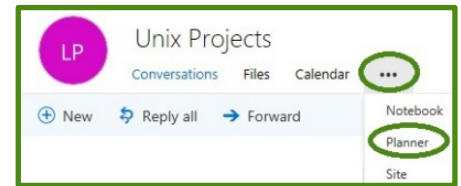
**Callout Boxes:**

- Name of Group this Plan belongs to:** Points to the "Simple Soiree" header.
- How to view this Plan:** Points to the "Board" view tab.
- More Plan options &:** Points to the three-dot menu icon next to the view tabs.
- Members of Group; all can access this Plan:** Points to the "Members" dropdown menu.
- How to view:** Points to the view tabs (Board, Charts, Schedule).
- Name of Bucket in this Plan:** Points to the "To Buy" bucket header.
- Add new Task to this Bucket:** Points to the plus icon in the "To Buy" bucket.
- Name of Task in this Bucket:** Points to the task "Stuffed Sausage & Cheese Bread".
- Task Due Date & Member assigned:** Points to the task details showing "Due 08/30" and "Raisin, Randy".
- Add new Bucket to this Plan:** Points to the "Add new bucket" button on the right.

## Use Planner in Groups

Group members and owners can add and view plans.

1. Open **O365 Outlook for the Web**
2. Open a Group
3. Near the Group name click the **Ellipsis** to see more, then click **Planner**



## Use Planner in Teams

Team members and owners can add and view plans.

1. Open **O365**, click on **Teams**
2. Near the Team name click the **Ellipsis** to see more, then click **Manage Team**
3. Click **Apps**, click **Planner**, click **Available**
4. Select options to create a new plan or use an existing plan, click **Save**.

