

A large, translucent, dome-shaped structure, resembling a space station or a futuristic habitat, is shown floating in space. The structure is composed of many vertical, curved panels that create a grid-like pattern. It is positioned on the left side of the frame, with its right edge curving towards the center. Below the structure, the horizon of a planet is visible, showing a thin layer of clouds and the dark surface of the planet. The background is a deep blue space filled with numerous small, distant stars.

Microsoft Planner Deep Dive

24 June 2017

Thanks to the Sponsors!



Who Am I?



André Vala

SharePoint Lead Architect @ everis Portugal

Office Servers and Services MVP

SharePointer for 11+ years

Speaker & author



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<https://andrevala.com>



@atomicvee

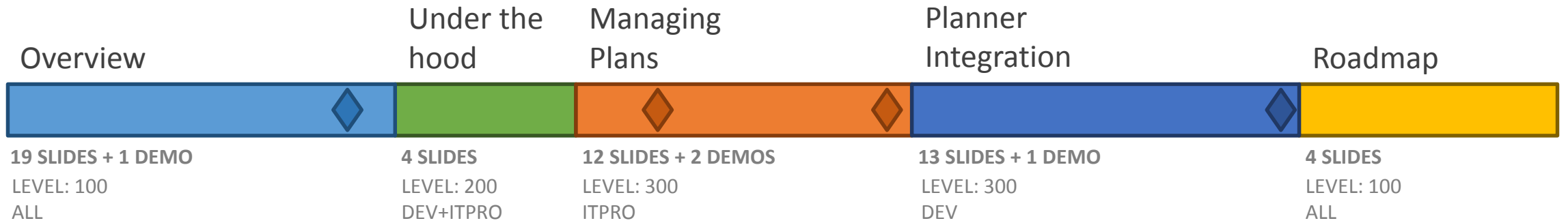


andre.vala@gmail.com



an NTT DATA Company

Agenda



Microsoft Planner

Overview



MODERN WORKPLACE CHALLENGES



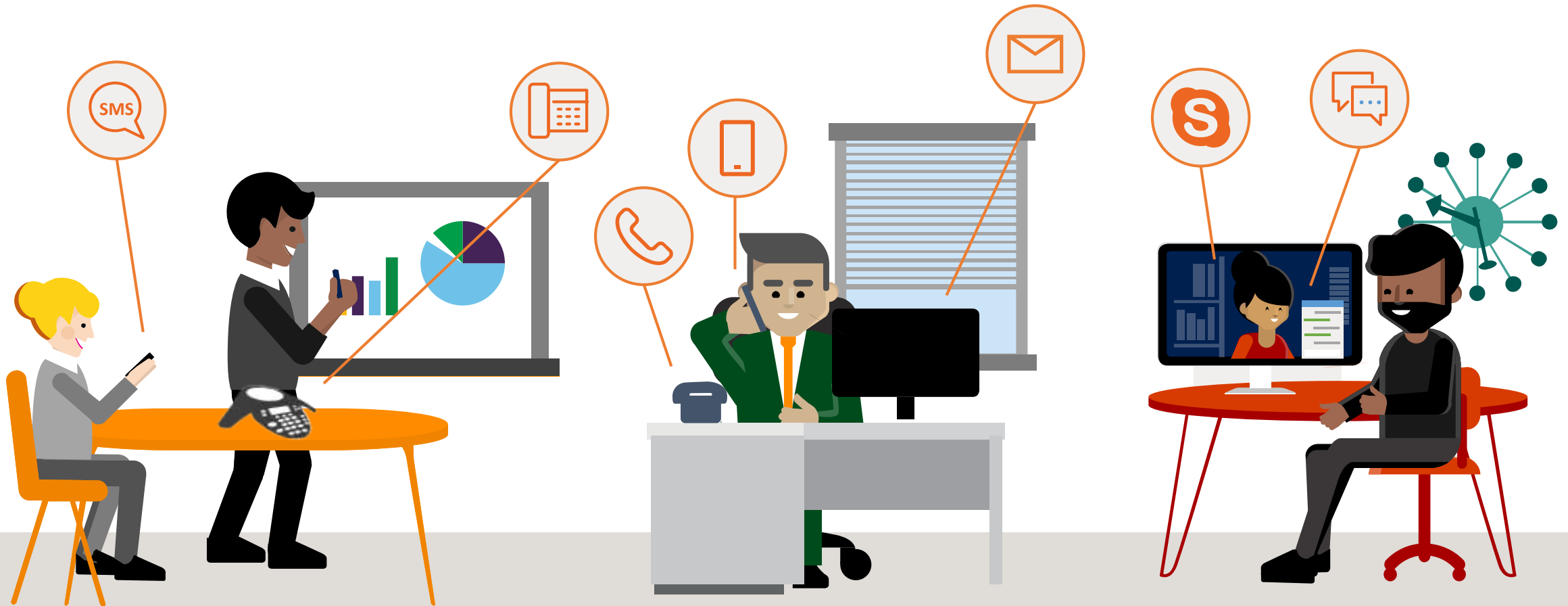
30% of executives say the greatest challenge to executing strategy is the failure to coordinate across units¹

62% of employees work from multiple locations in a month²

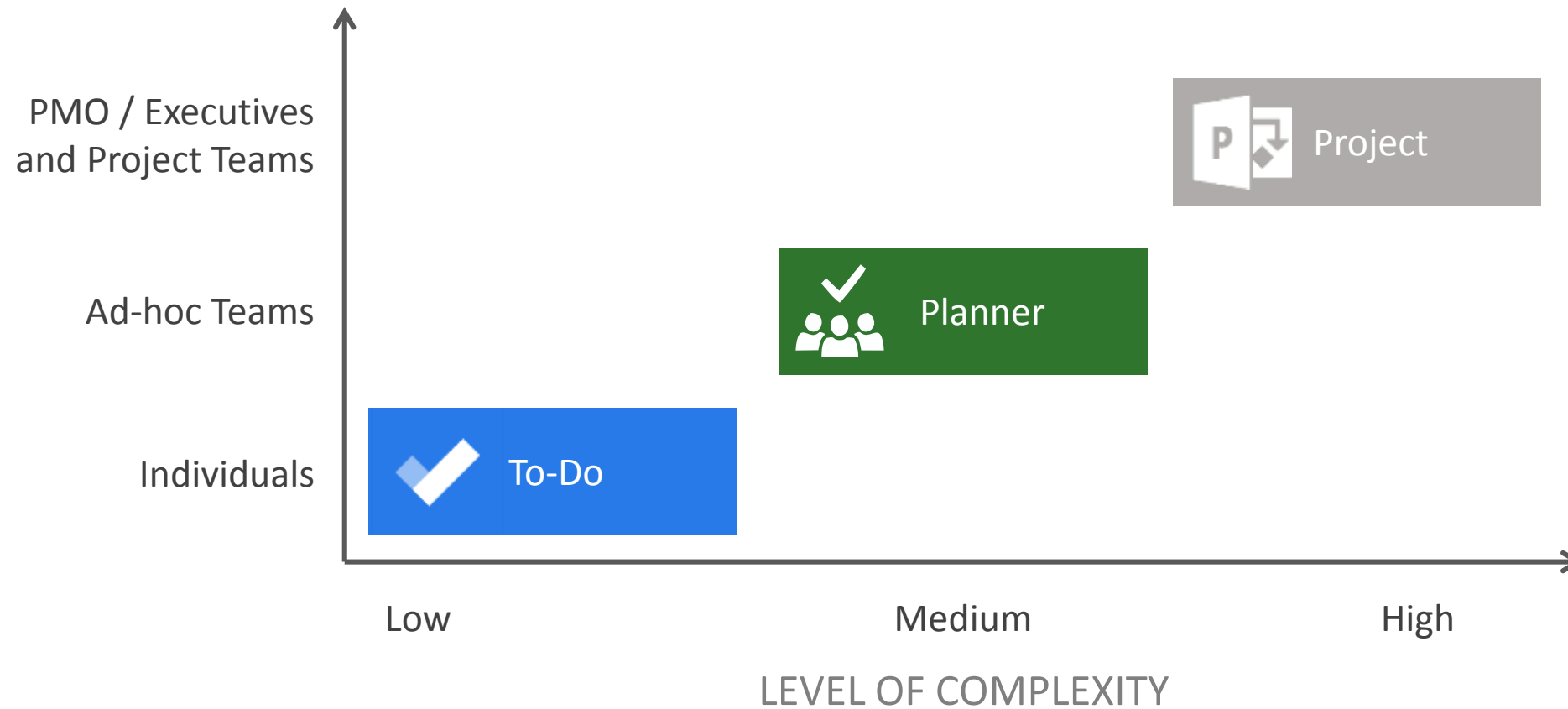
25% of the average worker's time goes into looking for information³

1. Harvard Business Review. "Why Strategy Execution Unravels—and What to Do About It."
2. Forrester Remote Work Survey
3. IDC. "The High Cost of Not Finding Information."

One size doesn't fit all

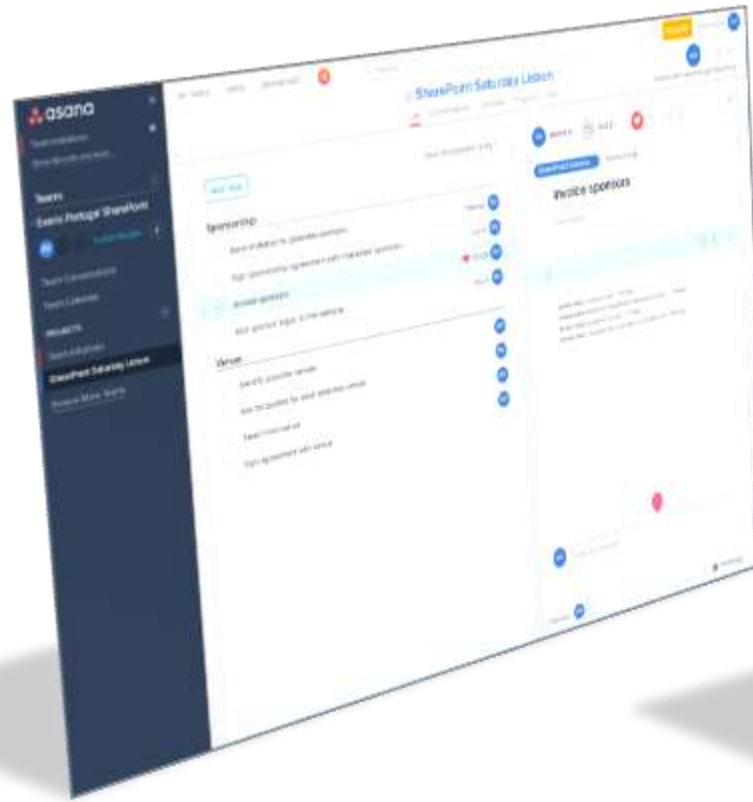


Work Management

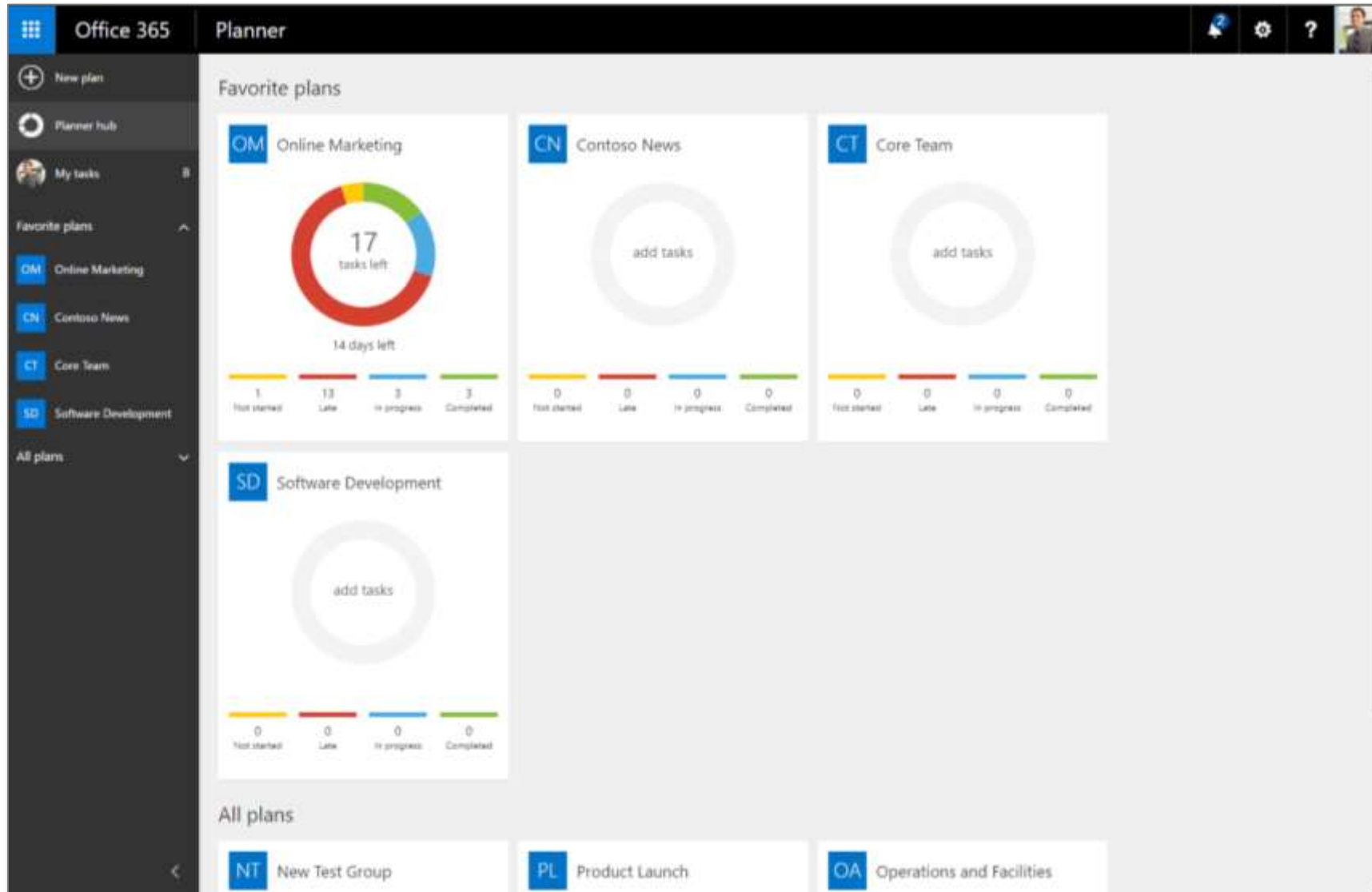


OVERVIEW

Competition



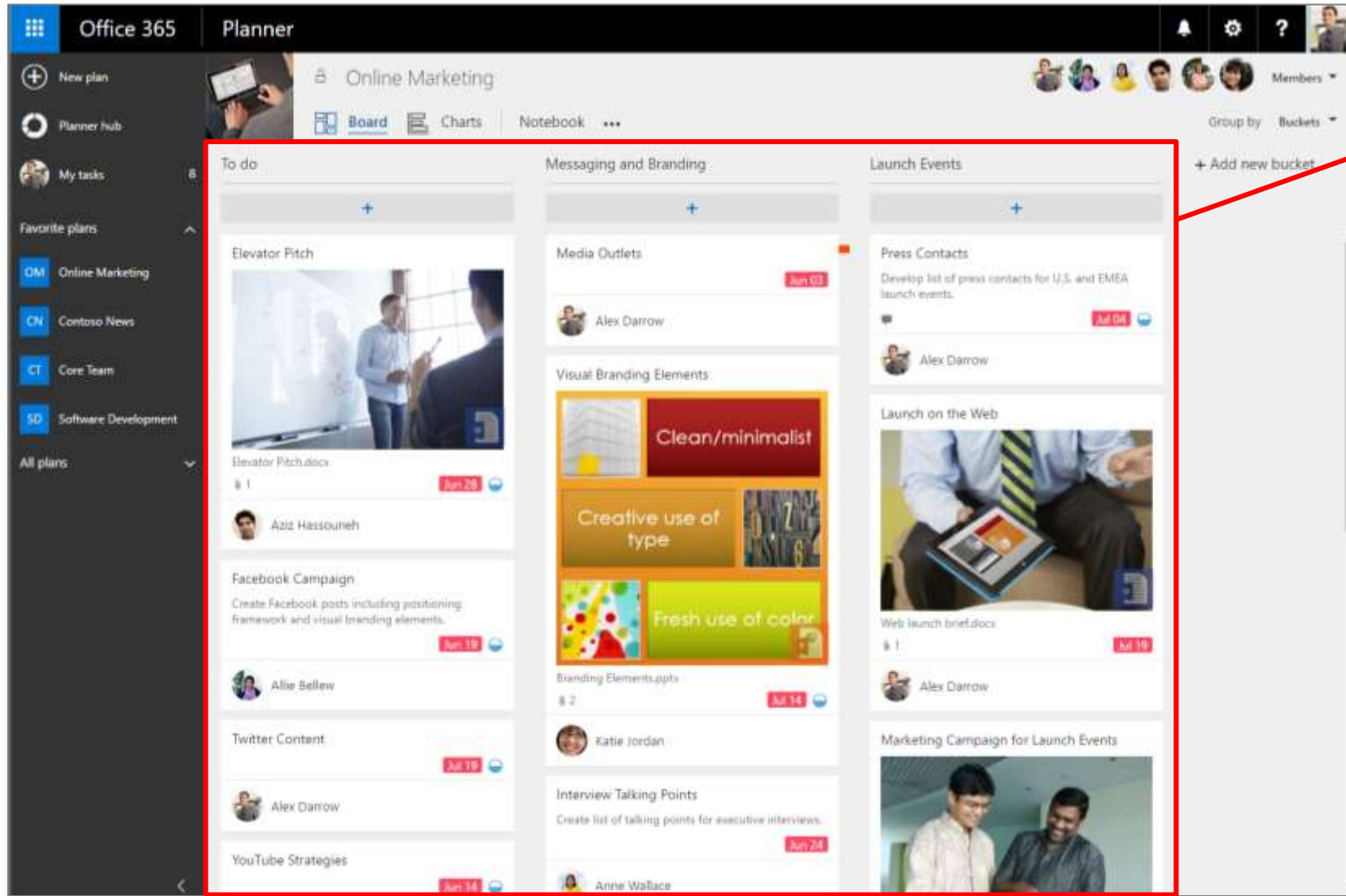
Planner Concepts



Planner Hub

- Shows a summary of each of the user's favorite plans
- Allows access to all of the organization's public plans

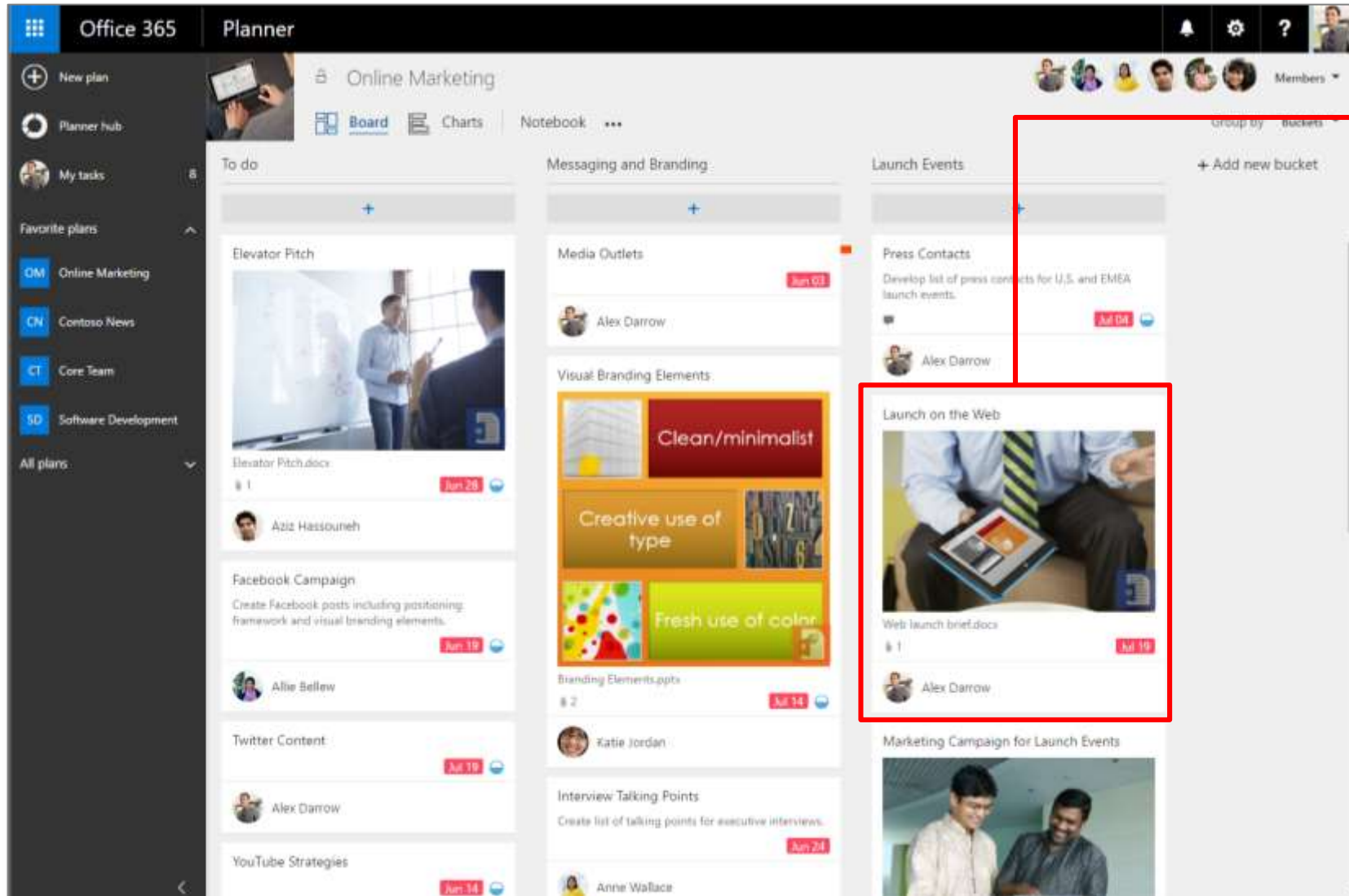
Planner Concepts



Plan

- Owned by a group
- Inherits group's members
- Contains **tasks**
- Contains **buckets**

Planner Concepts



Task

- Represented by a **card**
- Placed in a **bucket**
- Can be assigned to one or more members
- Can have a start and due date
- Has a progress status
- Can contain a checklist
- Can have files attached or linked
- Can have labels
- Can have comments

Planner Concepts

The image shows a screenshot of the Microsoft Planner application interface. A task card titled "Media Outlets" is highlighted with a red border. Red arrows point from various parts of the task card to labels on the right side of the image, identifying key Planner concepts. The task card includes fields for Owner(s), Label, Progress Status, Start Date, Due Date, Checklist, Attachments, and Comments.

Owner(s)

Label

Progress Status

Start Date

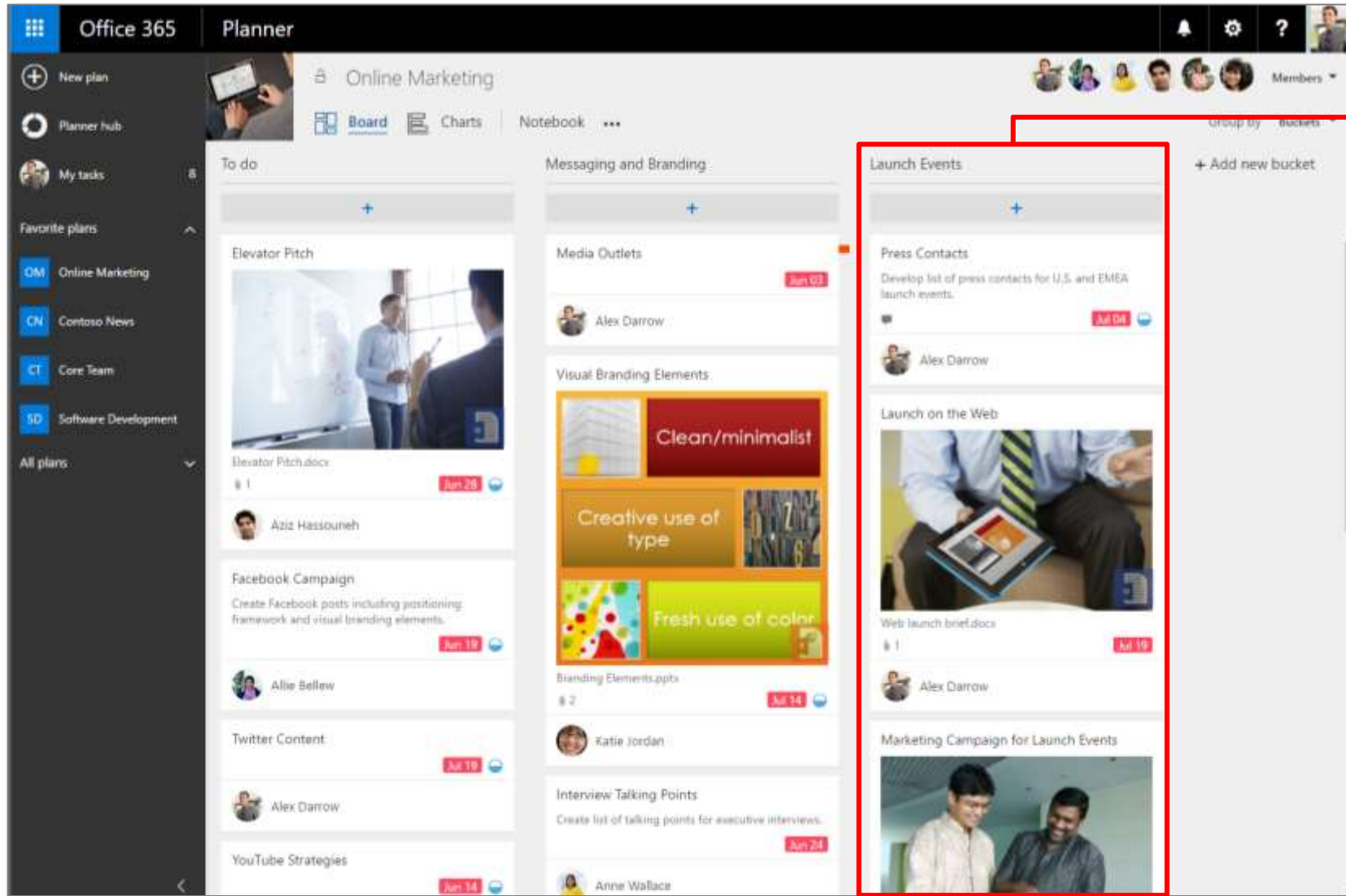
Due Date

Checklist

Attachments

Comments

Planner Concepts



Bucket

- Set of tasks organized in a column
- Can have any name
- A plan can have several buckets

Planner Concepts

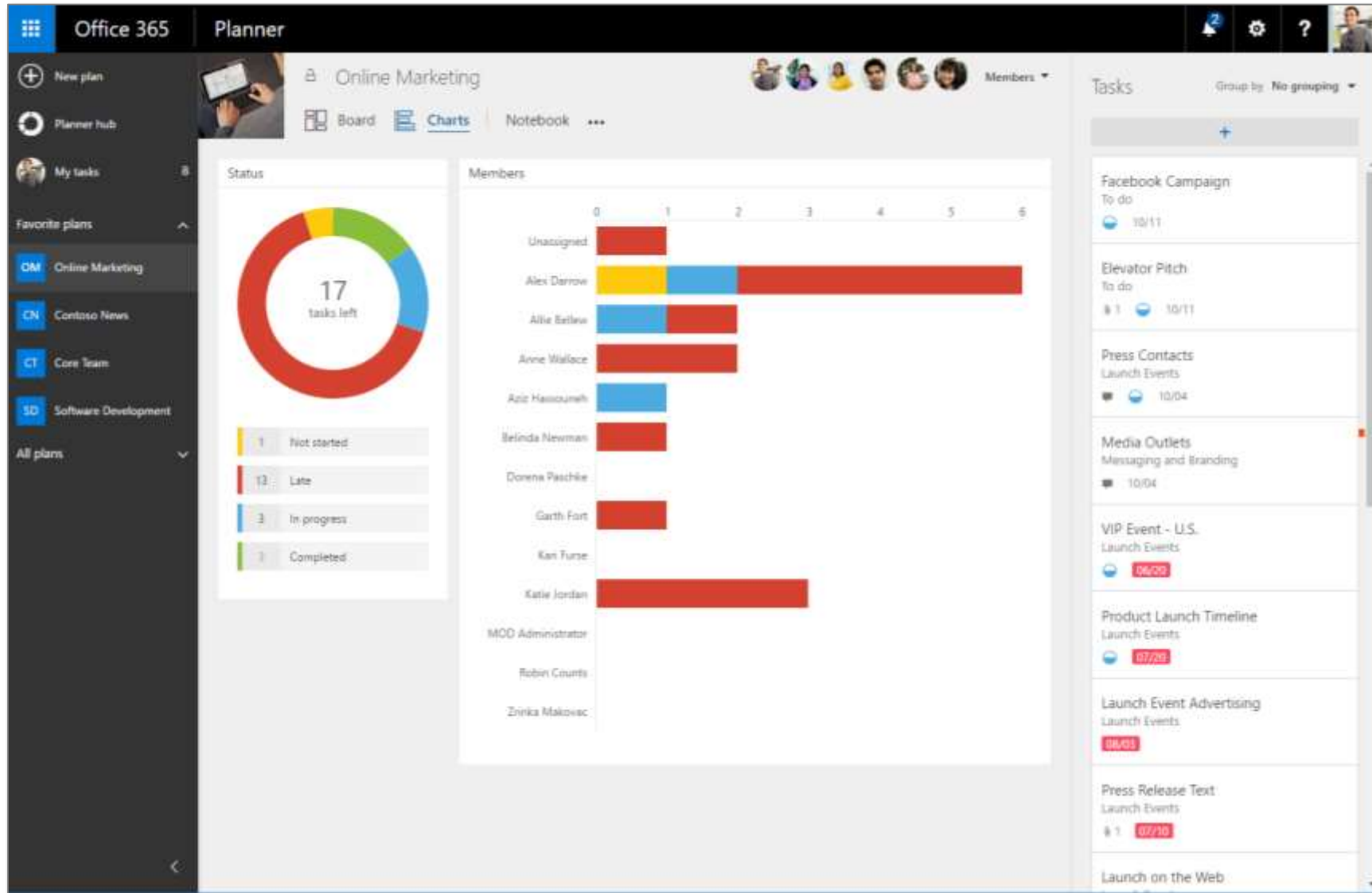
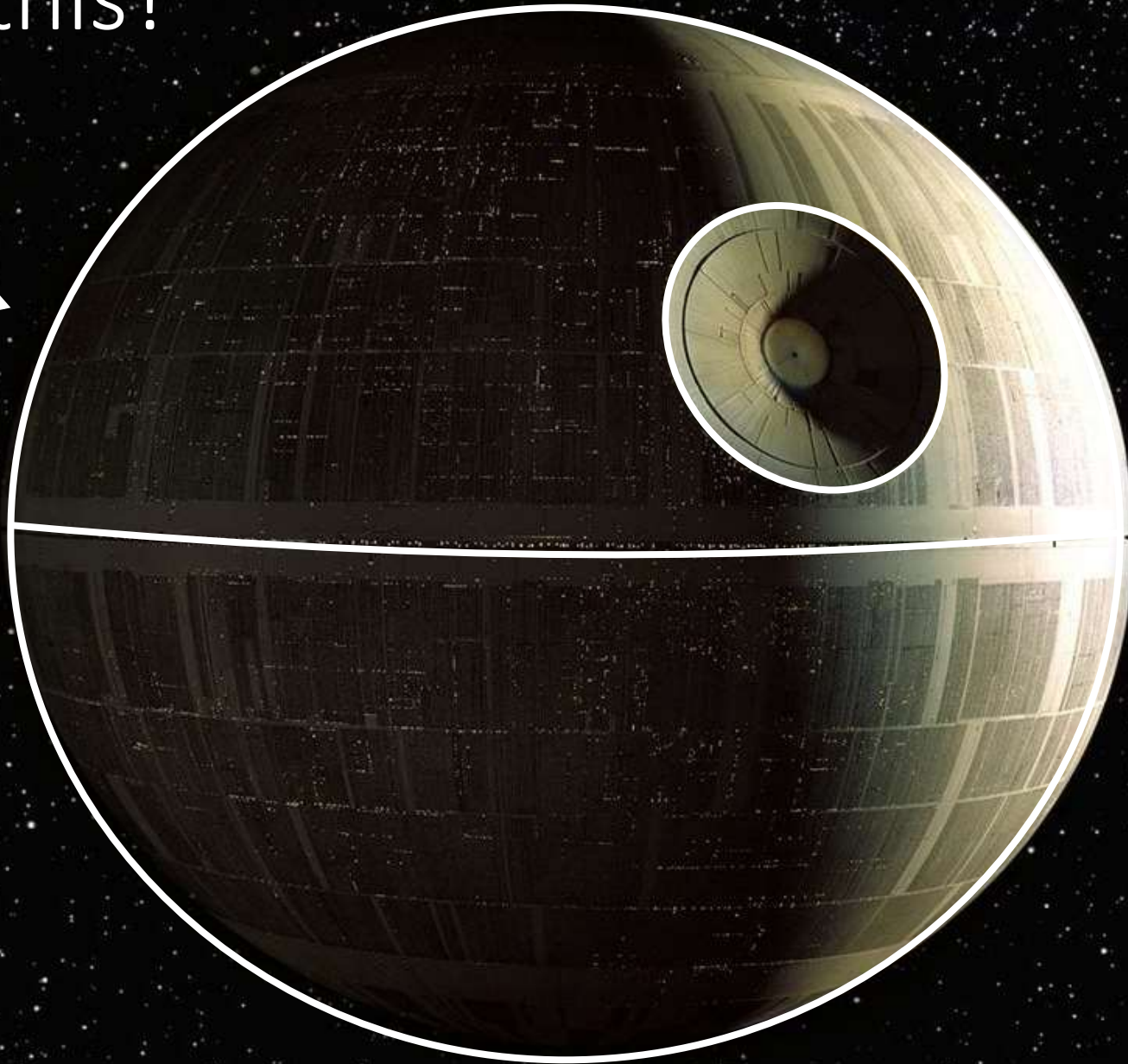


Chart View

- Shows plan tasks by status
- Shows tasks by group member
- Lists tasks and allows grouping and filtering

What is this?

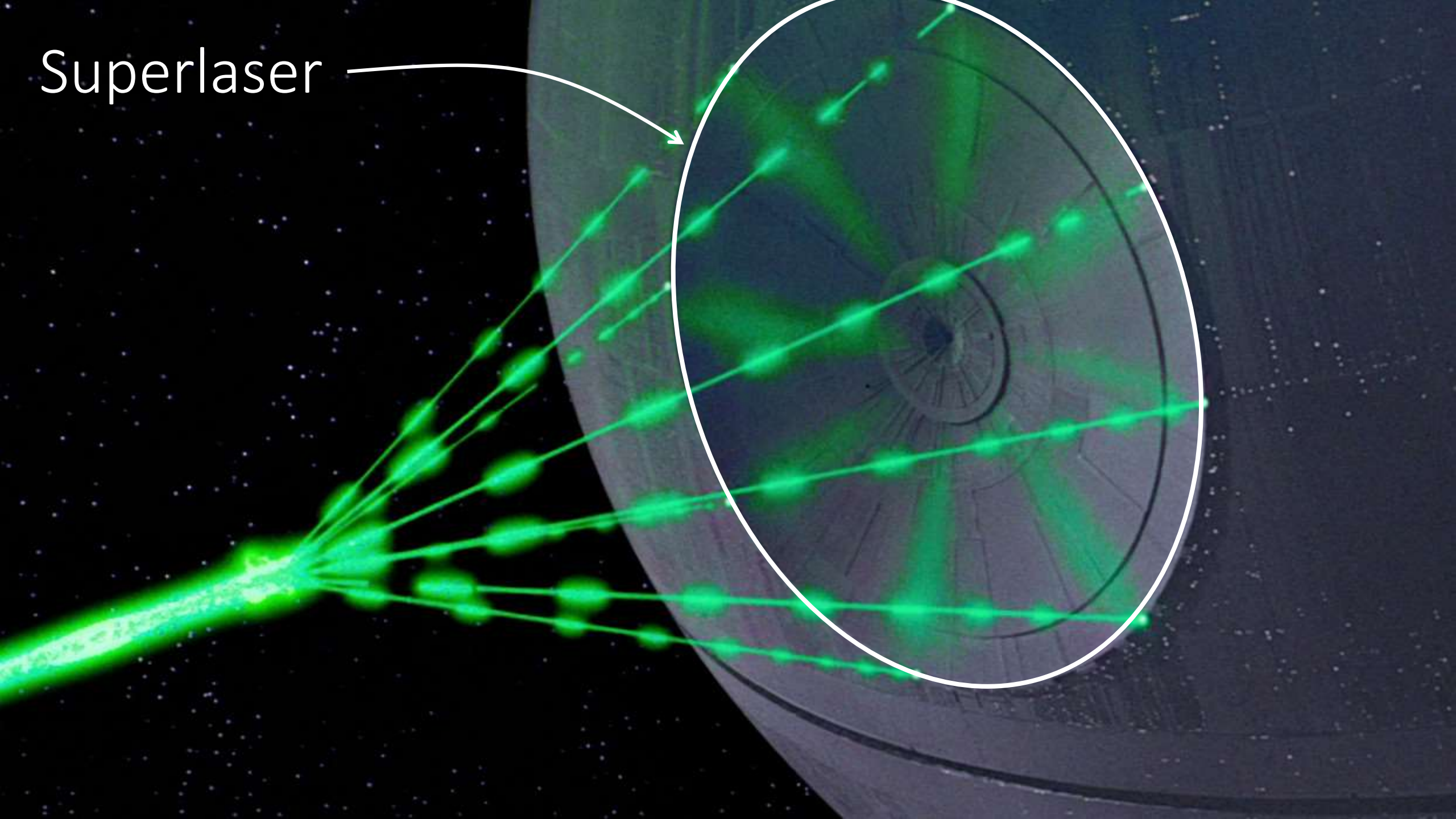


A Moon?

A Space Station!

Death Star

Superlaser





Who is this?

Darth Vader



Who is this?

Director Krennic

DEMO #1

Overview



Out-of-the-box Compliance

ISO 27001

ISO 27018

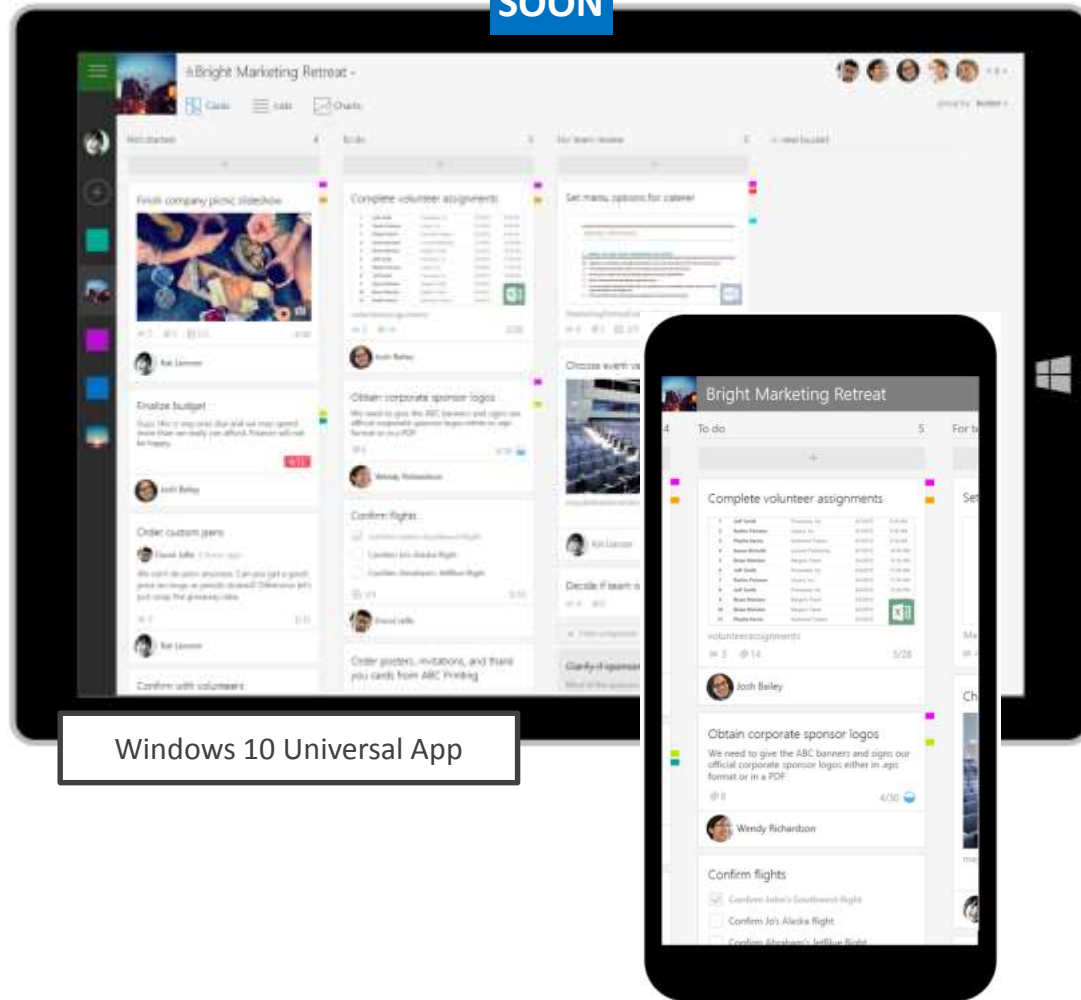
EU Model Clauses

HIPAA BAA

SOC 1 & 2

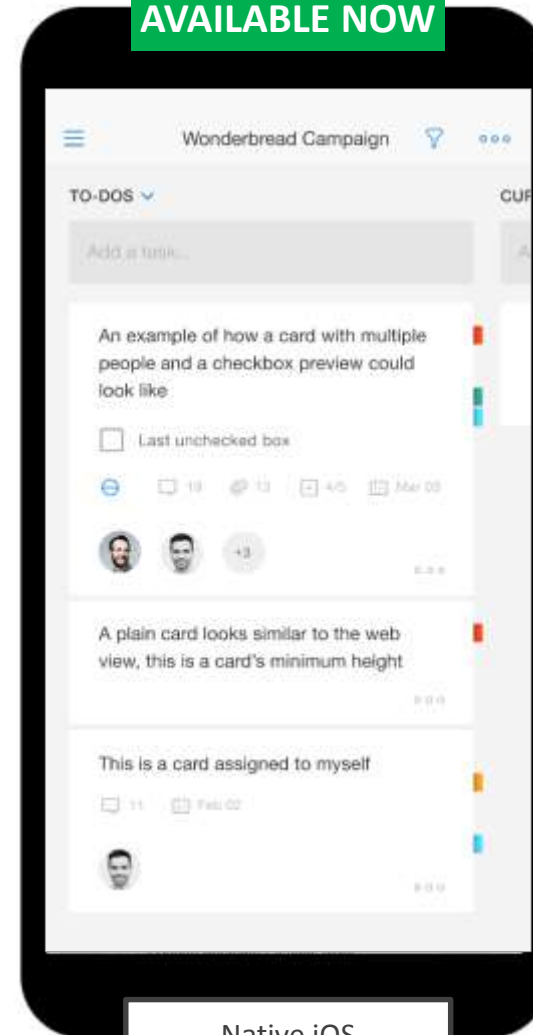
Planner Mobile Apps

SOON



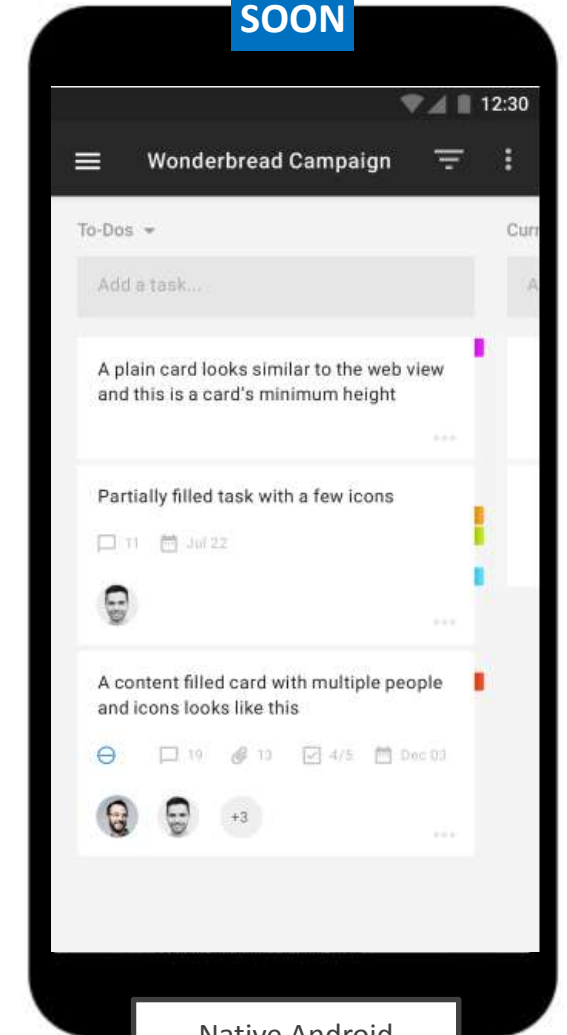
Windows 10 Universal App

AVAILABLE NOW



Native iOS

SOON



Native Android

Requirements

Office 365 Enterprise (E1, E3, E4 and E5)

Office 365 Education (E1, E3, E4 and E5)

Office 365 Business Essentials

Office 365 Business Premium

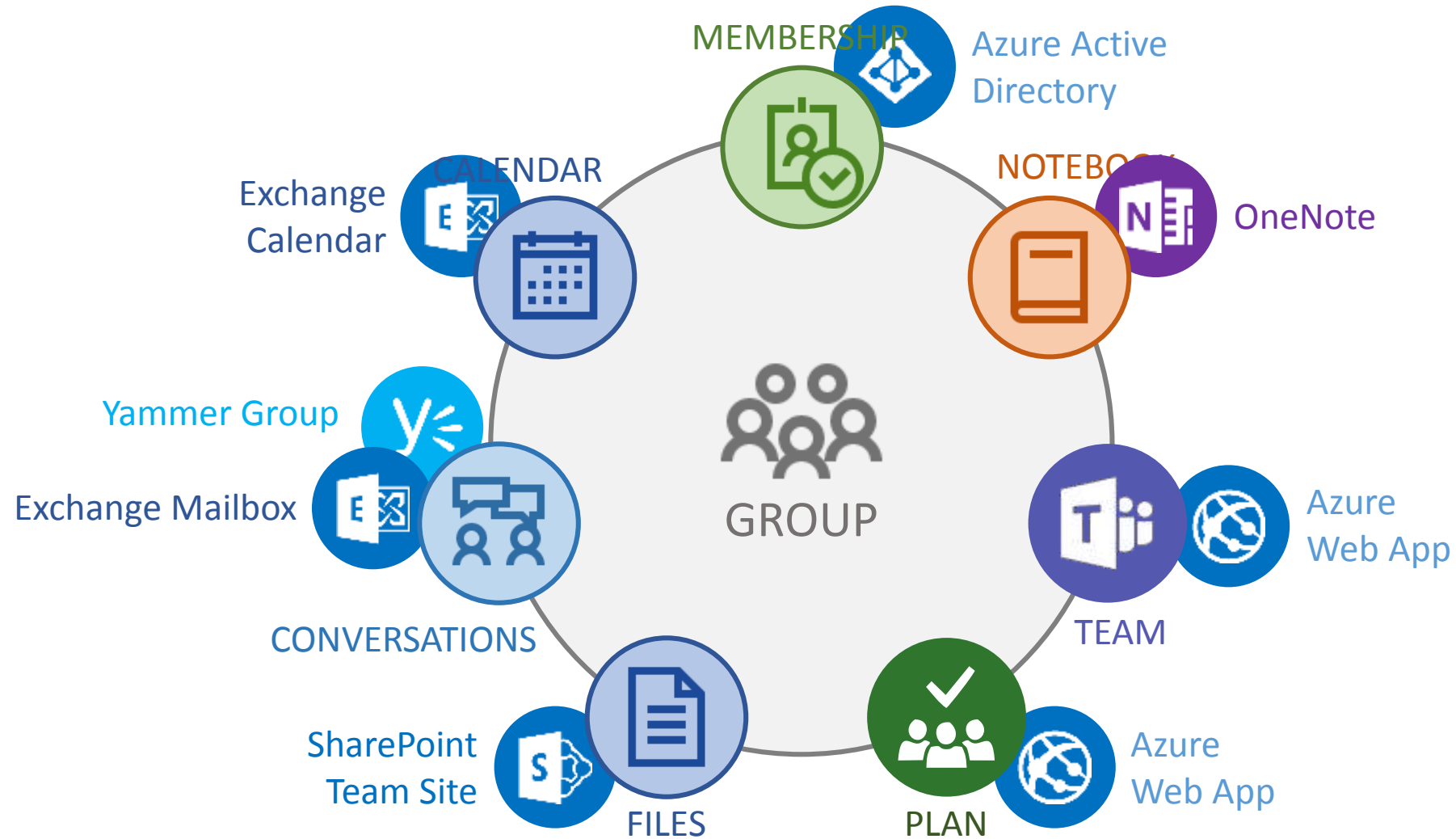
Microsoft Planner

Under the hood



UNDER THE HOOD

Architecture



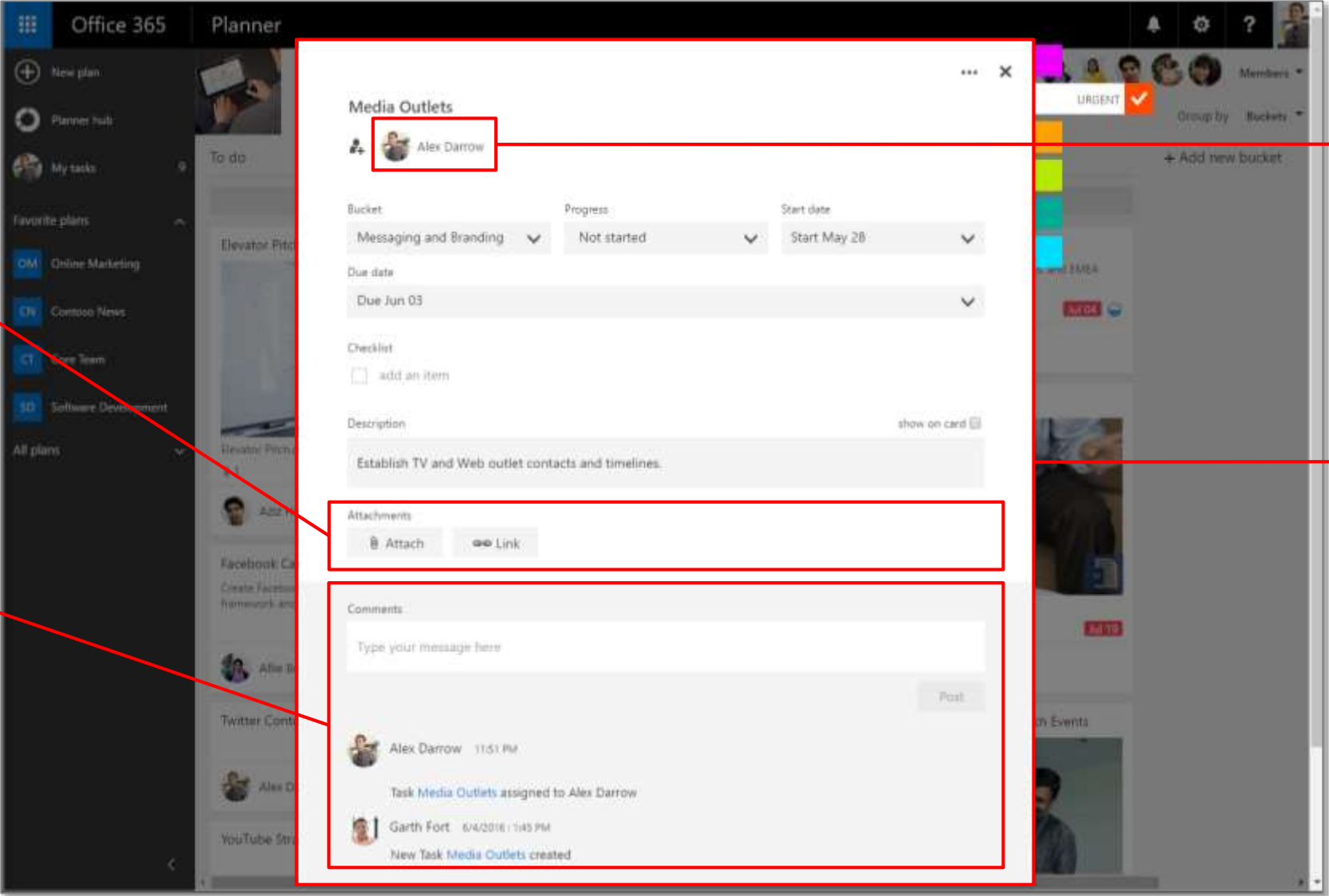
UNDER THE HOOD

Architecture

SharePoint
Team Site



Yammer
Group
Exchange
Mailbox

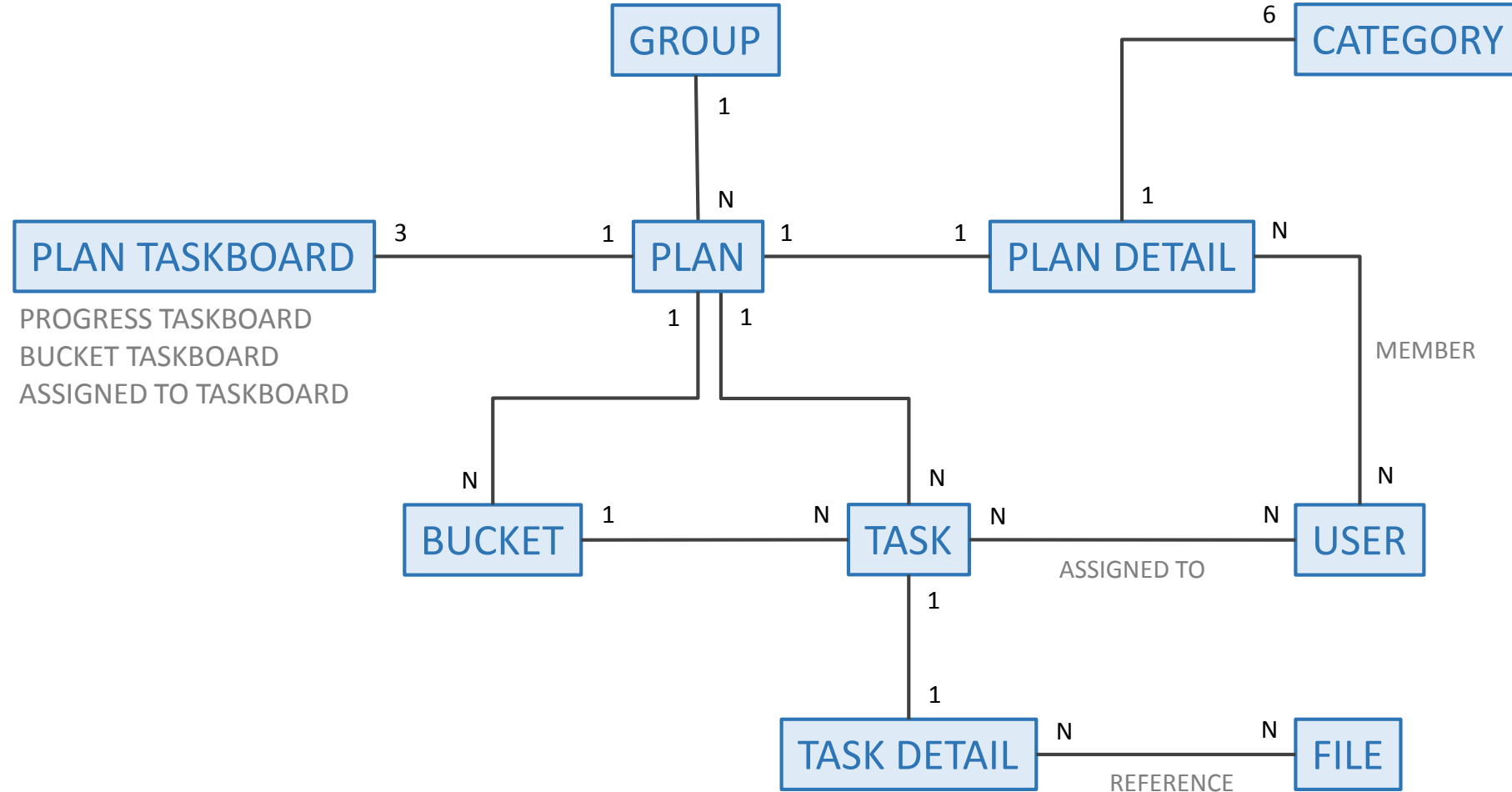


Azure AD



Azure

Data Model



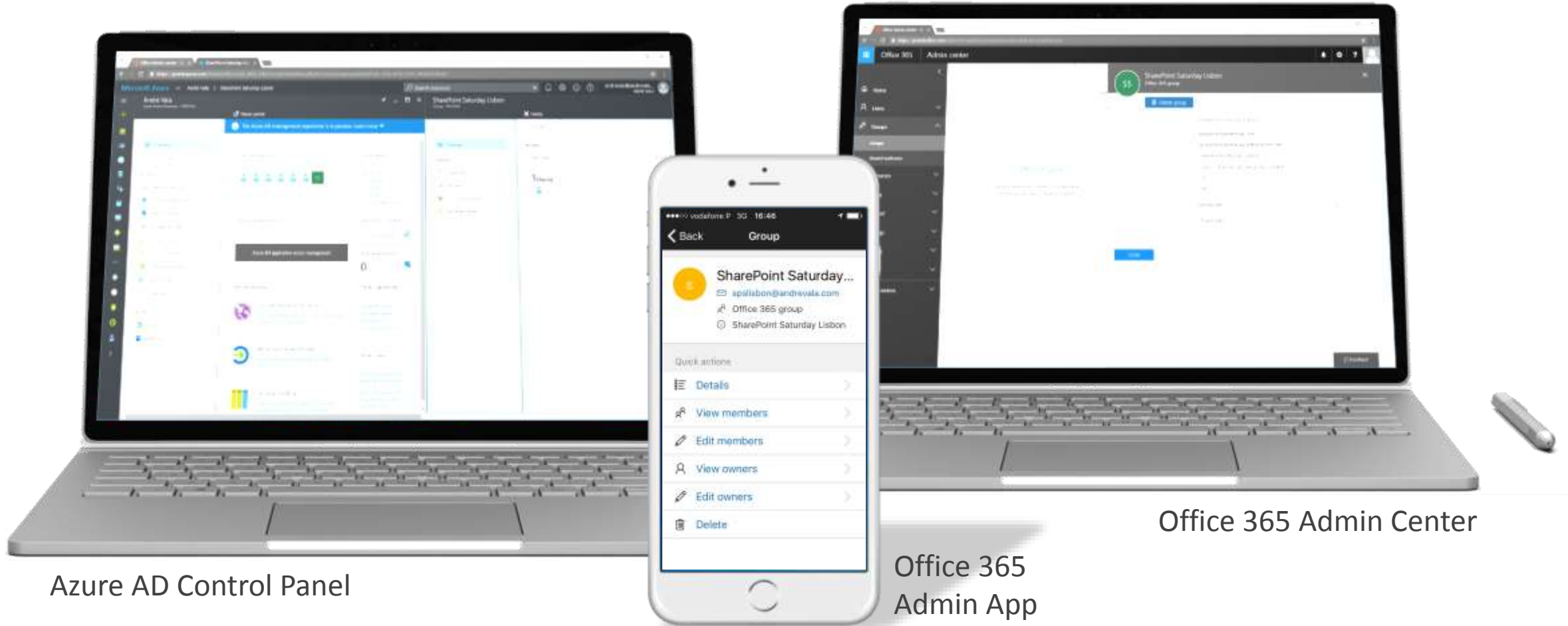
Microsoft Planner

Managing plans



MANAGING PLANS

Management UI



Azure AD Control Panel

Office 365
Admin App

Office 365 Admin Center

Management UI

Task	Azure AD Control Panel	Office 365 Admin Center	Office 365 Admin App
Create, update and delete groups	●	●	●
Add and remove group members and owners	●	●	●
Set dynamic membership policies	●		

DEMO #2

Management UI



PowerShell

*-UnifiedGroup

Create, edit and delete groups

Manage single-value properties available on the Group object

*-UnifiedGroupLinks

Manage members, owners and subscriber list

Plan Creation Policies

- Creation policies are configured in Azure Active Directory
- Requires a group of users that are allowed to create groups

```
PS> Connect-MsolService  
  
PS> $policy = Get-MsolAllSettingTemplate | where-object {$_.displayname -eq "Group.Unified"}  
  
PS> $setting = $policy.CreateSettingsObject()  
  
PS> $setting["EnableGroupCreation"] = "false"  
  
PS> $setting["GroupCreationAllowedGroupId"] = "{group ID}"  
  
PS> New-MsolSettings -SettingsObject $setting
```

Disable Guest Access

- Requires a tenant admin user
- Blocks access of external users to Group resources but still allows external users to access contents explicitly shared with them.

```
PS> Connect-MsolService  
PS> $policy = Get-MsolAllSettingTemplate | where-object {$_.displayname -eq "Group.Unified"}  
PS> $setting = $policy.CreateSettingsObject()  
PS> $setting["AllowGuestsToAccessGroups"] = "false"  
PS> New-MsolSettings -SettingsObject $setting
```

Prevent Users From Adding Guests

- Requires a tenant admin user
- Blocks group members from adding guest users to the group

```
PS> Connect-MsolService  
PS> $policy = Get-MsolAllSettingTemplate | where-object {$_.displayname -eq "Group.Unified"}  
PS> $setting = $policy.CreateSettingsObject()  
PS> $setting["AllowToAddGuests"] = "false"  
PS> New-MsolSettings -SettingsObject $setting
```



Who is this?

Galen Erso

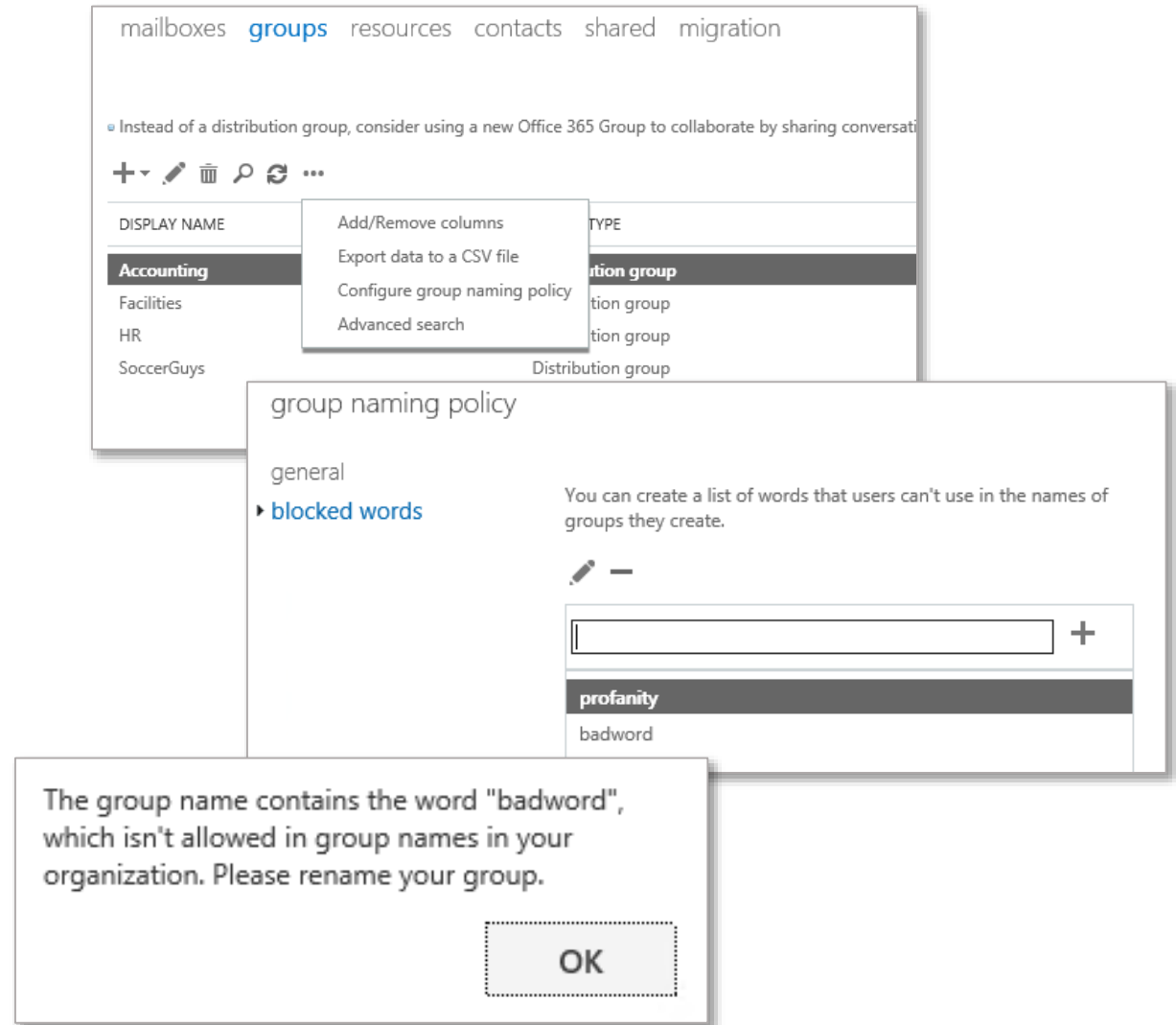
DEMO #3

Managing Plans
with PowerShell



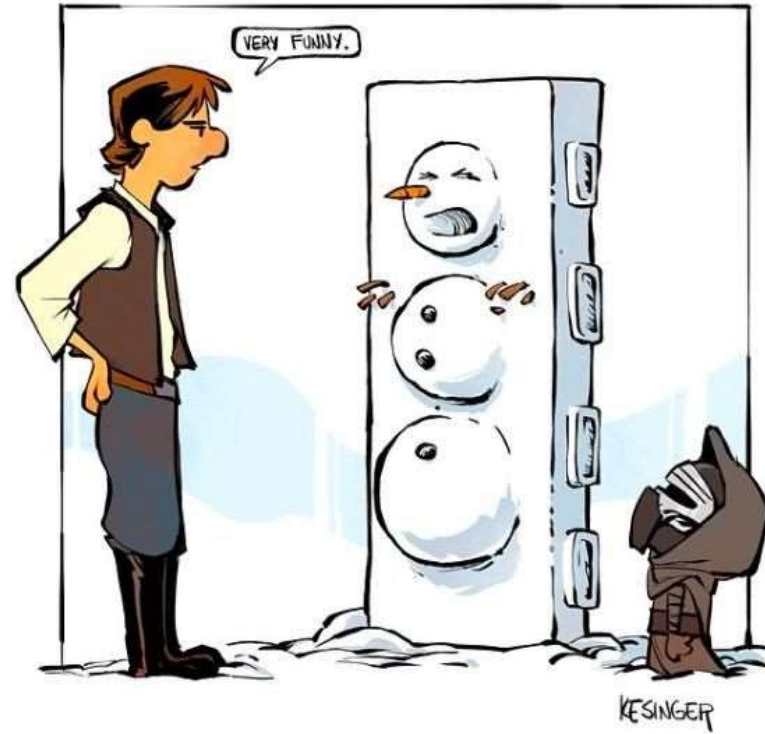
Naming Conventions

- Set on display name during create/change
- Blocked word list, pre-/post-fix based on AAD attributes or fixed text
- Same policy for DL and Groups
- IT admins can override
- Does not work when a plan is created in planner!



Dynamic Membership

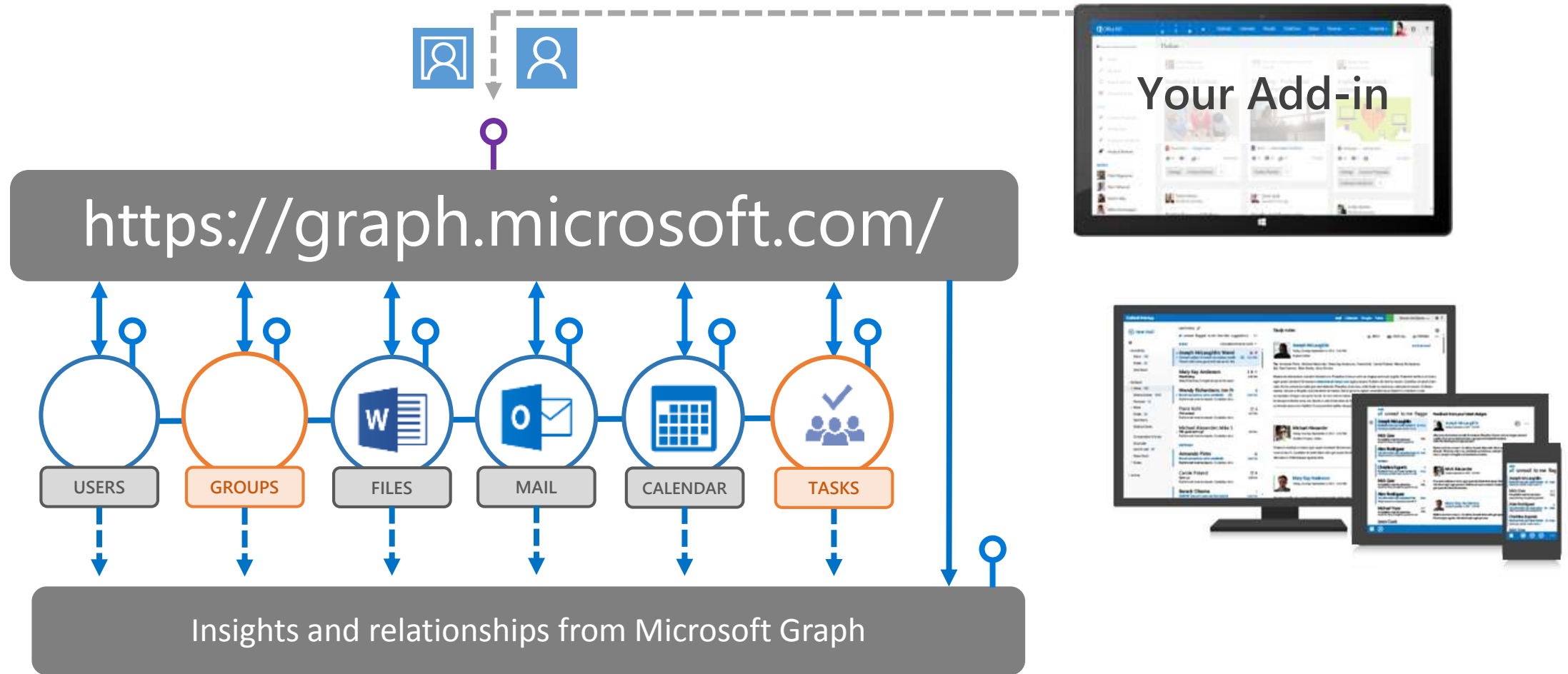
- Automatically includes/excludes members based on a rule
- Configured on Azure AD management portal
- Requires **Azure AD Premium**



Microsoft Planner

Planner Integration

Microsoft Graph API



Microsoft Graph API

GROUPS API



MANAGEMENT



CONVERSATIONS



NOTES



PLANS



EVENTS



DRIVE

TASKS API



PLANS



BUCKETS



TASKS

Groups API

Get Group Info

GET <https://graph.microsoft.com/v1.0/groups/{id}/>

Get Group Members

GET <https://graph.microsoft.com/v1.0/groups/{id}/members>

Get Group Plans

GET <https://graph.microsoft.com/beta/groups/{id}/plans>

Get Groups I'm a Member Of

GET <https://graph.microsoft.com/v1.0/me/getMemberGroups>

Plans API

Get Plan Info

GET [https://graph.microsoft.com/beta/plans?\\$filter=owner eq '{id}'](https://graph.microsoft.com/beta/plans?$filter=owner eq '{id}')



Group ID

Get Plan Details

GET <https://graph.microsoft.com/beta/plans/{id}/details>

Get Plan Buckets

GET <https://graph.microsoft.com/beta/plans/{id}/buckets>

Get Plan Tasks

GET <https://graph.microsoft.com/beta/plans/{id}/tasks>

Tasks API

Get My Tasks

GET [https://graph.microsoft.com/beta/tasks?\\$filter=createdby eq 'me'](https://graph.microsoft.com/beta/tasks?$filter=createdby%20eq%20%27me%27)

Get Task Info

GET <https://graph.microsoft.com/beta/tasks/{id}>

Get Task Details

GET <https://graph.microsoft.com/beta/tasks/{id}/details>

Buckets API

Get Bucket Info

GET <https://graph.microsoft.com/beta/buckets/{id}>

Get Bucket Tasks

GET <https://graph.microsoft.com/beta/buckets/{id}/tasks>



Death Star Plans

Jyn Erso

Stolen Death
Star Plans



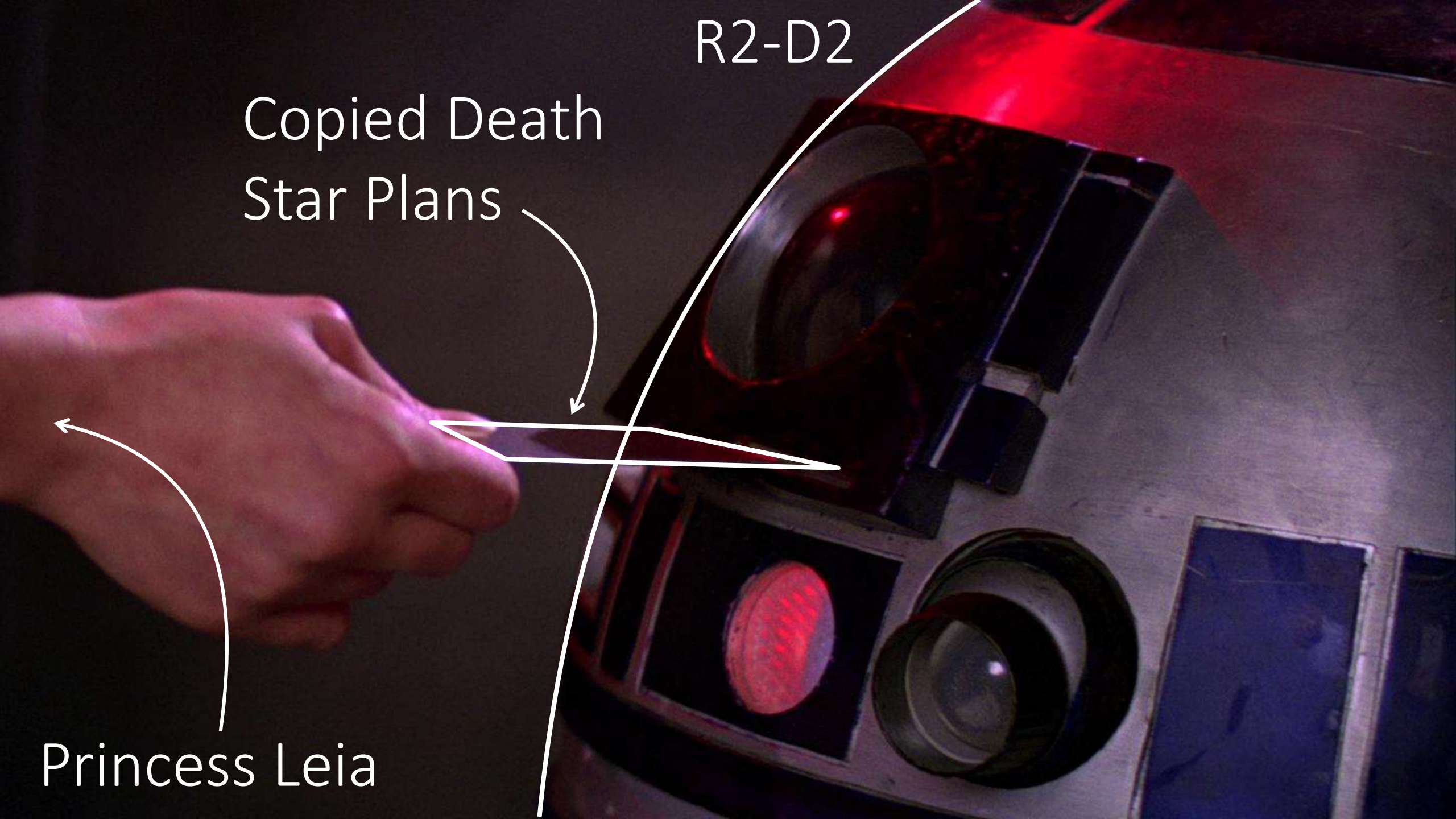


Darth Vader tried to avoid the theft...

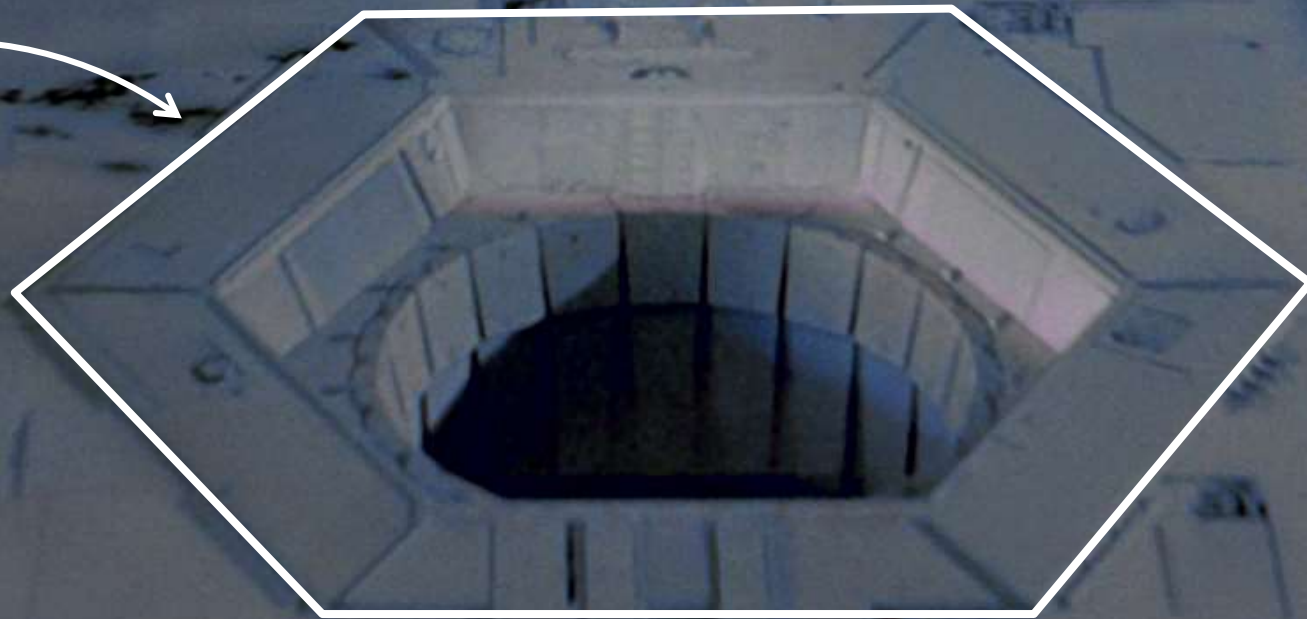
R2-D2

Copied Death
Star Plans

Princess Leia



Thermal
Exhaust Port



Design flaw?

DEMO #4

Planner Integration



Microsoft Planner

Roadmap

Roadmap

Available Now

- Creation Policy in AAD
- External user access **PARTIALLY**
- Multiple users per task
- Alert management
- Planner mobile apps

Soon

- Plan templates
- Timeline view
- Custom backgrounds

Most Requested

- Integrate tasks with calendar **IN PROGRESS**
- Better integration with Outlook
- Due date notification
- Multiple plans per group
- Search capabilities

External User Access

Plan Owner/Members

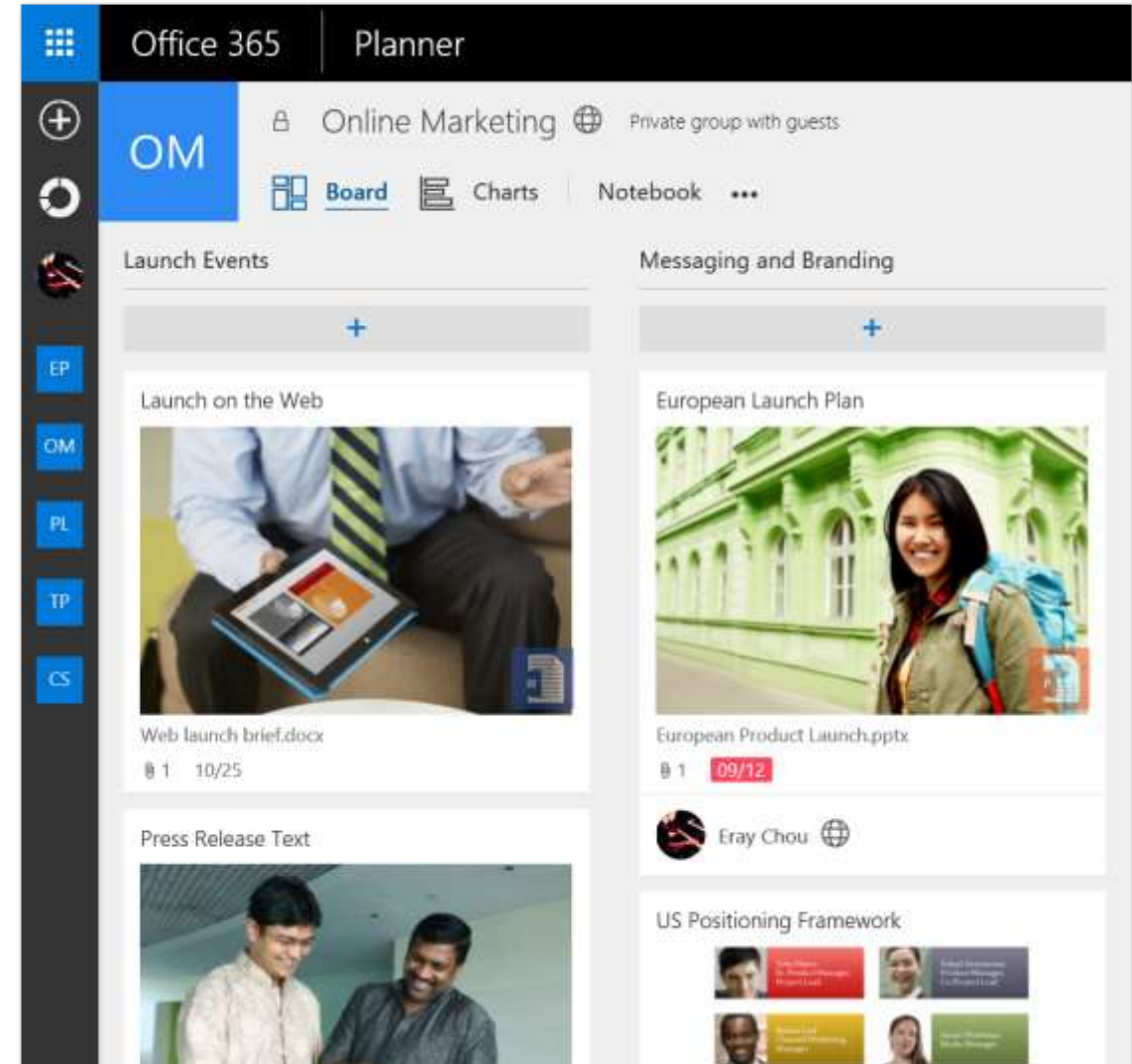
- Owners can add guest users
- Members are aware of guest participation across all group endpoints

Guests (subscribed experience in their email account)

- Receives a welcome email and groups messages
- Access Plans as well as files and notes

Tenant Admin can turn on/off:

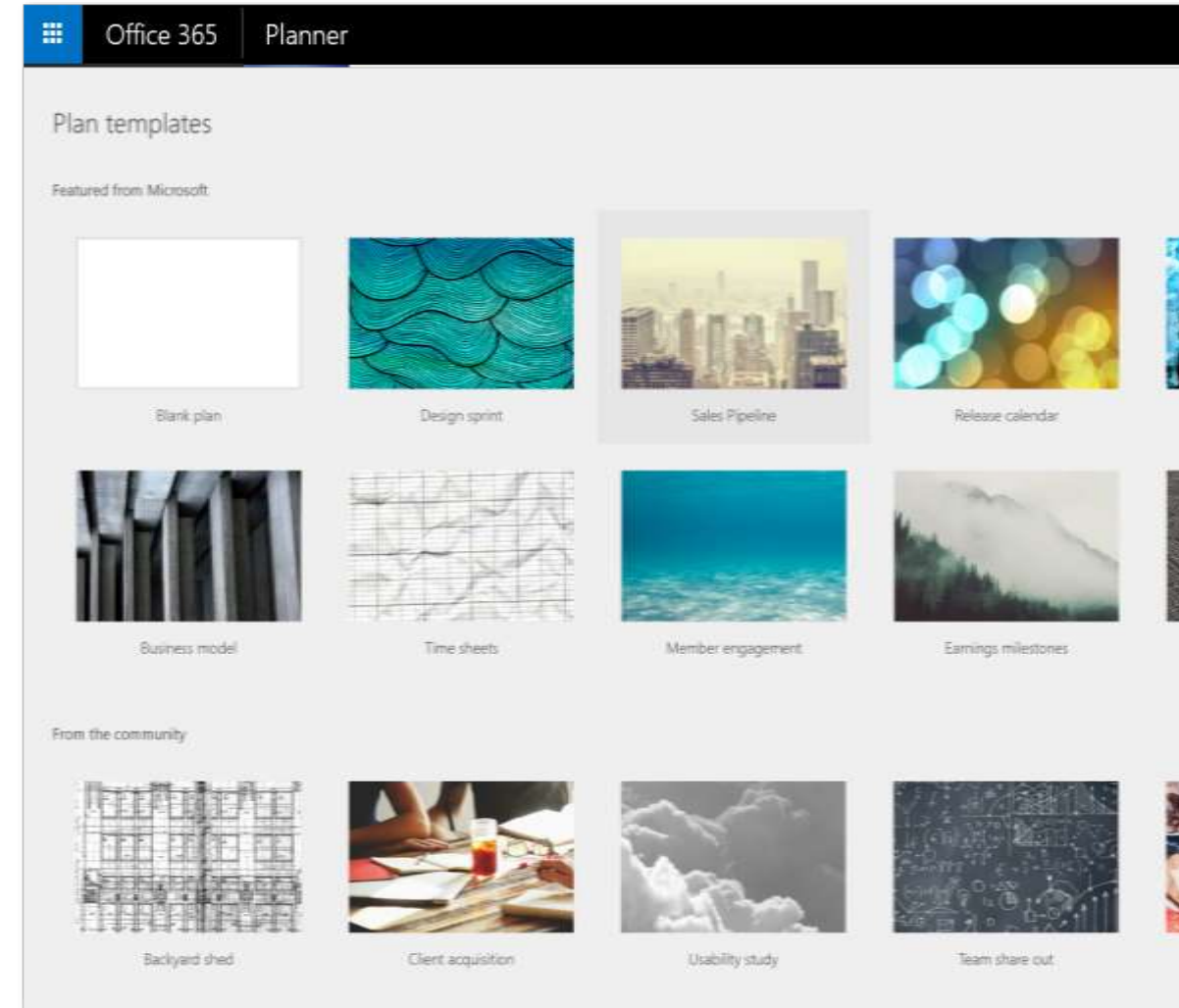
- Guest access to groups within tenant
- Adding of guest users per group
- Adding of guest users across any group within tenant



Plan Templates

Early Thinking (plans may change)

- Start from existing plan / copy plan
- User/Org defined templates
- Task/Bucket/Checklist templates
- Recurring Tasks
- **NOT** Microsoft defined templates



Next Steps

Microsoft Tech Community

<https://techcommunity.microsoft.com>

Planner @ User Voice

<https://planner.uservoice.com>

Answers @ Microsoft

<https://answers.microsoft.com>

Office Blog

<https://blogs.office.com>

Office Roadmap

<http://roadmap.office.com>



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Thank you
Brian Kesinger



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