

Microsoft Planner Plan Export to Excel Procedure

FPG M365 Migration Guidance

Overview

Microsoft Planner allows you to export your plan data (tasks, assignments, progress, etc.) into an Excel file for reporting, tracking, or sharing purposes. This procedure will guide you through the export to excel feature.

Note: Export is only available when using Planner through a web browser (not the Teams app). Additionally, Microsoft Planner does NOT have a built-in “import from Excel” feature to create or update plans directly. You will need to copy/paste your excel data into your newly created plan.

Step-by-Step Instructions

Step 1: Open Your Plan

1. Go to <https://tasks.office.com> or open Planner via **Microsoft 365 (Office.com)**
2. Navigate to the **Plan** you want to export

Step 2: Access Plan Settings

1. In the top-right corner of the plan, click the plan name in the top toolbar (**More Actions**)
2. Select **“Export plan to Excel”**

Step 3: Download the Excel File

1. The file will automatically generate and download
2. Open the file in Excel

What’s Included in the Export

The Excel file will contain a table with key task details, including:

- Task Name
- Assigned To

- Bucket (category)
- Progress status
- Priority
- Start Date
- Due Date
- Created Date
- Completed Date
- Description (if available)

Important Notes / Limitations

- Export provides a **snapshot in time** (not live data)
- Attachments, comments, and checklist items are **not included**
- Plans must be exported **one at a time**
- You must have **access to the plan** to export it

Tips for Use

- Use Excel filters to quickly sort tasks by owner, status, or due date
- Create pivot tables for reporting (e.g., tasks by user or status)
- Save versions periodically if you need historical tracking