Microsoft Planner

Course Overview

Microsoft Planner is a task management and organisational system, it is a to do app for your team. Planner is not a project management tool and does not offer scheduling or task dependency functionality like Microsoft Project.

Planner does, however, provide your team with a highly visual and mobile tool to help organise and manage team-wide tasks.

Planner provides all users with access to Kanban boards using content-rich task cards with files, checklists, labels, and more. Your team can easily collaborate in Planner and Microsoft Teams at the same time using the Tasks by Planner and To Do app.

Program Format

This is a 3-hour program that is delivered virtually.

Course Objectives

- Understand Microsoft Planner basics and integration.
- Create and manage plans across Microsoft 365 and Teams.
- Organise and assign tasks using buckets.
- Export plans and link them to Outlook and Teams.

Course Outline

Understanding Planner
What Is Microsoft Planner
Planner Integration
Planner Benefits
Planner in Microsoft Teams

Creating Plans
Create a new plan – via Microsoft 365
Create a new plan – via Microsoft Teams
Create a new plan – via Planner Mobile

Adding & Managing Members
Add, edit and delete members from a plan

Creating Bucket & Task
Creating plan content
What is a bucket
Setting up plan buckets
What is a task
Setting up tasks
Assigning Tasks to Members

Managing Plans
Accessing plans from multiple platforms
Explore plan views
Manage Tasks
Use task filters
Use grouping options
Exporting plans to Excel
Linking plans to Outlook and Teams
Understanding Microsoft 365 Groups

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