

Introduction to Microsoft Planner

1 Day Course

Overview

Planner is a simple planning and project management app in Microsoft 365. It enables users/groups to be more productive. The course covers the key functionality of creating new plans, organising work, assigning and managing tasks, collaboration with colleagues, progress monitoring and integration with Microsoft Teams.

Audience

Users requiring Planner to organise work and teams in a simple visual format.

Course Objectives

By the end of the course, delegates will be able to use Planner to organise and manage tasks and projects.



Prerequisites

Delegates should be familiar with Microsoft 365.



Course Contents (1 day)

What is Planner?

- o Quick recap of Microsoft 365 basics
- o Where Planner fits within Microsoft 365
- o Planner vs To Do vs Microsoft Project
- o When to use Planner?

Getting Started

- o Opening Planner
- o Planner in Microsoft Teams
- o Planner web experience
- o Understanding the navigation
- o My Day
- o My Tasks
 - Private Tasks, Assigned to me
 - Flagged emails, All
- o My Plans
 - Recent, Shared, Personal, Pinned
 - My Teams

Creating a Plan / Group

- o Create / Name a new plan
- o Personal vs shared plans
- o Microsoft 365 Groups
- o Adding members
- o Using templates
- o Understanding plan structure
- o Creating buckets
- o Choosing an appropriate bucket structure

Creating and Managing Tasks

- o Task name

- o Adding and Assigning Tasks to others
- o Start date / Due date
- o Viewing progress on a plan
- o Priority
- o Description
- o Checklist
- o Attaching files to tasks
- o Links
- o Comments
- o Flagging tasks with labels
- o Task visibility, Updating a task's status
- o Sorting Tasks into buckets
- o Completing tasks

Organising & Collaborating

- o Using labels
- o Priorities
- o Checklists
- o Attachments
- o Task comments
- o Conversations
- o Copying tasks
- o Updating progress
- o Completing tasks
- o Managing overdue work

Changing the Views

Board view

- o Buckets
- o Kanban-style working

- o Dragging tasks
- o Grouping tasks
- o Visual progress

Grid view

- o Spreadsheet-style task management
- o Editing task information
- o Sorting
- o Updating dates and assignments

Schedule/Calendar

- o Tasks by date
- o Upcoming deadlines
- o Identifying overloaded periods
- o Calendar planning
- o Charts
- o Task status
- o Priority
- o Buckets
- o Members
- o Overall progress

Filtering & Grouping

Filtering by:

- o Assignment, Label, Priority, Bucket, Status, Due date

Grouping by:

- o Assigned to, Bucket, Labels, Due date, Priority, Status

Planner in Microsoft Teams

- o Why use Planner inside Teams?
- o Adding Planner to a Team/channel
- o Creating a new plan
- o Adding an existing plan
- o Working collaboratively
- o Assigning tasks from Teams
- o Notifications
- o Using Planner alongside meetings and conversations

Monitoring & Reporting

- o How to monitor progress
- o Identifying overdue work
- o Checking workload
- o Using Charts
- o Adding Tasks whilst in Chart View
- o Reviewing Completed vs Outstanding tasks
- o Running a weekly Planner review
- o Communicating status to stakeholders

Best Practice & Team Standards

- o Recommended team rules

Basic vs Premium Planner (Optional)

Basic

- o Grid, Board, Schedule, Charts, Tasks, Assignments, Labels, Filtering, Grouping, Collaboration

Premium

- o Timeline / Gantt
- o Dependencies
- o Milestones
- o People/workload
- o Goals
- o Sprints
- o Custom fields
- o Critical path
- o Advanced project management
- o Additional reporting capabilities

Course Materials

Enliten IT will provide each delegate with a workbook and other useful reference materials where applicable. These may be either paper based or in Adobe pdf format or a combination thereof.

Note: We only offer Microsoft Planner and Microsoft 365 courses on a private in-house basis.