Mastering Microsoft Planner

Microsoft Planner is a task management tool that allows individuals and teams to organize and manage their projects efficiently.

In this workshop, we'll introduce you to MS Planner how to use the app to manage projects, events or any other initiate that requires coordination and collaboration.

Workshop Learning Outcomes

Once you've completed this training, you will know how to:

- Create Plans where you will track tasks for yourself and your team.
- Set due dates, add labels, attachments, and comments to tasks
- Customize Kanban boards to visualize your workflow and track the progress on your tasks
- Delegate and track progress on delegated tasks
- Group and filter your tasks
- Integrate MS Planner with Excel, Outlook, SharePoint & Teams

Overview of MS Planner

- What is MS Planner?
- Overview of the App interface
- Setting-up Planner notifications

Working with Plans & Tasks

- Creating a new Plan
- Overview of Plan options and components
- Managing your Plan settings (members, backgrounds, notifications and more)
- Creating task buckets
- Adding Tasks to your Plan
- Setting task dates & priorities
- Creating and assigning custom labels to your tasks
- Assigning tasks to one or multiple team members
- Adding files to your tasks
- Communicating with task delegates through task comments & Group Conversations
- Tracking task progress

Working with Task Views

- Working with the different task views (Grid, Board, Charts and Schedule views)
- Grouping and Filtering your tasks
- Editing and updating your tasks

Integration with other Microsoft 365 Apps

- Integration with OneNote
- Integration with SharePoint
- Integration with Outlook
- Integration with Excel
- Integration with Teams

Workshop Formats:

- Classroom: 9:00am - 4:00pm

  OR

- Live webinar: Two 3 hour sessions

  *Includes

  - A detailed learning guide
  - Unlimited complimentary coaching