

Microsoft Planner (Basic Version) Essentials

Course Outline

Course Overview

This course provides a comprehensive introduction to Microsoft Planner's basic version, focusing on task and project management within the Microsoft 365 ecosystem. Participants will learn how to organise teamwork, assign tasks, track progress, and integrate Planner with other Microsoft 365 apps for enhanced productivity. The course is suitable for individuals and teams seeking to improve their project management and collaboration skills.

Course Objectives

- Understand the core features and benefits of Microsoft Planner
- Create and manage plans, tasks, and buckets
- Collaborate with team members and track progress
- Integrate Planner with other Microsoft 365 applications
- Apply best practices for efficient task and project management

Target Audience

- Team leaders and project managers
- Staff working collaboratively in Microsoft 365 environments
- Individuals seeking to enhance their task management skills

Introduction to Microsoft Planner

- What is Microsoft Planner?
- Planner in the Microsoft 365 ecosystem
- Accessing Planner on web and mobile

Getting Started

- Signing in and creating a plan
- Identifying Basic vs Premium Planner features
- Using Planner templates

Understanding the Planner Interface

- Navigation bar and views (My Plans, Pinned, Shared, etc.)
- Managing plans, plan details, and privacy settings
- Adding plans to groups and sharing plans

Organising Work: Buckets and Tasks

- Creating and managing buckets
- Adding, assigning, and editing tasks
- Setting due dates, priorities, and labels
- Using checklists, attachments, and comments

Planner Views and Task Management

- Board, Grid, Schedule, and Charts views
- Filtering, sorting, and grouping tasks
- Tracking progress and task completion

Integration and Collaboration

- Integrating Planner with Teams, Outlook, and To Do

- Collaborating using comments and sharing updates
- Using notifications and reminders

Reporting and Best Practices

- Exporting plans to Excel for reporting
- Manual status reporting and visual summaries
- Applying best practices for plan management

Templates, Use Cases, and Security

- Creating reusable plans as templates
- Common use cases for Microsoft Planner
- Managing multiple plans
- Security and permissions overview

Hands-On Exercises

- Create plans using templates and assign tasks
- Organise tasks into buckets and apply labels
- Integrate Planner with Teams and To Do
- Export plan data and review reporting options
- Present your project in breakout sessions

Resources and Further Learning

- Reference links: Software Solutions website, YouTube, LinkedIn
- Additional support and training materials

By the end of the course, participants will be able to confidently use Microsoft Planner to organise projects, collaborate with their teams, and manage tasks effectively within the Microsoft 365 environment.