

Microsoft Planner Training Agenda (Level 100)

Overview

Planner allows teams to work together effortlessly by organizing projects visually in an easy to use application that works seamlessly across all your devices.

Session Summary



Engagement deck



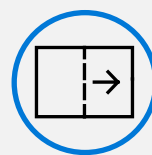
Navigation and functionality



Create a plan



Follow your plan



Next Steps

Expectations

- Understand Planner navigation and Microsoft 365 integrations
- See how to create and organize a plan
- Share a plan and assign tasks
- Learn to stay on top of tasks assigned to you
- Learn to stay on top of the project using charts, calendars, and specialized views
- Work with Planner in Teams or SharePoint

Engagement Deck

- Get more done intuitively, visually, and collaboratively with Planner
- Arrange tasks into customizable buckets
- See individual and team tasks in one place
- Use the schedule view and task notifications to stay on top of deadlines
- Quickly understand the status of all tasks

Navigation and functionality

- Overview Tasks in Microsoft 365
- Integrations
 - Teams
 - To Do
 - Outlook
 - SharePoint
- Accessing Planner
 - Web app
 - Mobile app
- Navigate Planner Home

- Planner Hub
 - My tasks
 - Favorites and Recent Plans
- Navigate a Plan
 - Board, Chart, and Schedule views
 - Additional features
 - Filtering and Grouping
 - View Members
- Overview M365 Groups

Create a plan

- Add a plan to a new or existing M365 Group
 - Create a new group and add people
 - Connect to an existing group and manage access through group membership
- Create a bucket to sort your tasks
- Create a new Task
 - Add notes
 - Checklists
 - Priority
 - Comments
 - Labels
 - Attach files
 - Assign due dates and people
 - Copy a task
- Edit buckets and tasks
- Best practices for building plans
 - Utilize buckets
 - Stay organized with labels
 - Have conversations with team members

Follow your plan

- Filter your tasks
- Set and update task progress
- Group by in board view to group by due date or progress
- Use Charts to check status of tasks, buckets, and members
- Use Schedule view to organize your tasks on a calendar
 - View and manage tasks
 - Manage unscheduled tasks
 - Remove a task's start or due date
- Add your plan to Outlook calendar
 - View your plan and tasks in Outlook
 - Open task in Planner
- View Planner tasks in To Do
- Manage task notifications
 - When assigned a task

- When a task is late, due, or due in the next 7 days

Next Steps

- Integration with SharePoint team sites
- Deep dive Tasks in Teams
 - Tasks as a personal app
 - Connect a plan to a channel
- Additional courses related to tasks
- Question and answer