MICROSOFT PLANNER – MANAGING ACTIVITIES

½ DAY

Microsoft Planner is a web-based and desktop tool used for individual or teamwork planning with intuitive, collaborative and simple card-based interface. Planner will assist you in handling small projects without complex planning effort. You can efficiently assign tasks, create checklists, add labels, update tasks, add attachments and collaborate with your team members.

COURSE CONTENT

NAVIGATE THE PLANNER INTERFACE

- Overview of the Planner home page
- View your plans in Planner hub
- View your own tasks with My tasks
- Favorite a Plan

CREATE A NEW PLAN

- Start with a new plan
- Format the new plan
- Add a member
- Copy a plan

ADD BUCKETS AND TASKS TO A PLAN

- Plan and create buckets
- Add tasks to the buckets
- Assign tasks
- Add start dates and due dates
- Add items to the checklist
- Add attachments
- Change the progress status
- Prioritize the tasks
- Move tasks
- Copy tasks
- Complete a task
- Delete tasks

VIEWING OPTIONS

- Review the menu options
  - o Board, Charts and Schedule

PLAN SETTINGS
- Change the plan settings
- Delete a plan
- Copy a plan
- Export a plan
- Changing the name of your plan
- Add a background image
- Set your notifications
- Add your plan to your Outlook calendar

GROUPING AND FILTERING TASKS
- Review the grouping options
- Filter your tasks by different categories

SHARE YOUR PLAN WITH OTHERS
- Collaborating options between a plan owner and a plan member
- Creating a plan in MS Teams