

MICROSOFT PLANNER 365- INTRO



Corporate IT Course

LEARNING OUTCOMES

- Understand the purpose and features of Microsoft Planner 365 and how it works with other Microsoft 365 tools.
- Create and organise tasks, boards, and buckets, and prioritise work effectively.
- Collaborate with colleagues using comments, attachments, and task history.
- Monitor task progress, use labels, filter tasks, and apply different views to manage plans efficiently.
- Analyse Planner data using charts, dashboards, and exports for reporting and decision-making.
- Use advanced features such as templates, Teams integration, and Planner tabs.
- Optimise workflows by organising tasks and buckets to improve team productivity.
- Develop practical skills through hands-on exercises, managing real-world tasks and plans.

COURSE OVERVIEW

Boost your productivity and streamline team collaboration with Microsoft Planner 365. This hands-on course teaches you to create and organise tasks, track progress, and collaborate in real time using boards, buckets, labels, and dashboards. You'll also explore templates, Teams integration, and Planner tabs, equipping you with practical skills to manage projects efficiently and keep your team on track from day one.

TOPICS COVERED IN THIS COURSE

Introduction to Planner 365

Overview of Planner, its purpose, key features, and how it complements To Do for task management.

Creating Tasks

Understand Boards, Buckets, and Tasks. Learn to create and manage plans, including private and public plans, use templates, add tasks, create buckets, move tasks between buckets, and prioritize tasks effectively.

Collaboration and Communication

Discover how to coordinate tasks with colleagues, add comments, track task history, and attach files to tasks to enhance team communication and collaboration.

Monitoring Plans

Learn to monitor task progress and status, filter tasks, use different views, and apply labels and progress indicators to track performance efficiently.

Analysing Planner Data

Understand how to export Planner data for reporting and analysis. Learn to interpret charts, view task progress dashboards, and make data-driven decisions.

Advanced Features

Explore advanced features such as setting up reusable Planner templates, embedding Planner within Teams channels, and creating Planner tabs for easier access.

Task Prioritization and Workflow Optimization

Learn best practices for prioritizing tasks, organizing buckets, and streamlining workflows to ensure team productivity and efficient project management.

Practical Application and Hands-On Use

Apply your knowledge in real scenarios with hands-on exercises, including creating plans, managing tasks, collaborating with colleagues, and analysing progress to reinforce learning.