Introduction to Microsoft Planner in Office 365
½ Day Course

Overview

Microsoft 365 Planner is a new planning and project management app for Office 365 that enables individuals and groups to be more productive. The course covers creating new plans, using Boards and Buckets to organize tasks, creating and assigning tasks, adding members, setting due dates to updating a project's status and sharing files with team members.

Audience

Users requiring Planner to organize teams in a simple visual format.

Course Objectives

By the end of the course, delegates will be able to use Planner to organize and manage tasks and projects.

Prerequisites

Delegates should be familiar with Microsoft Office 365.

Course Contents (½ day)

What is Planner Office 365?
- The Use of Planner 365
- Interlinked Applications

Creating a Plan / Group
- Creating and Managing a Plan
- Creating a Group

Using Buckets and Tasks
- Using Buckets
- Creating Tasks
- Adding and Assigning Tasks to others
- Attaching files to tasks
- Flagging tasks with labels
- Updating a task's status
- Viewing progress on a plan
- Sorting Tasks into buckets
- Changing the View

Charts
- Using charts to view progress
- Adding Tasks whilst in Chart View
- Changing the Group
- Re-assigning Tasks

Notebook
- Using Notebook

Mail and Calendar
- Mail
- Conversations
- Calendars

Course Materials

Enliten IT will provide each delegate with a workbook and other useful reference materials where applicable. These may be either paper based or in Adobe pdf format or a combination thereof.

Note: We only offer Microsoft Planner and Office 365 courses on a private in-house basis.