



## Microsoft Planner

### Getting Started

- What is Microsoft Planner
- Interacting with Planner via Microsoft Teams

### Creating Plans

- The Board
- Creating a Plan
- Creating a Bucket
- Assigning to Buckets
- Adding Tasks
- Adding due dates
- Assigning a task to others

### Adding more detail

- Adding more details
- Including checklists
- Adding file attachments
- Changing the priority
- Moving tasks between buckets

### Assignments and updates

- Add a member
- Remove a member
- Alter the members assigned

- Changing the progress and updating the status

- Work with labels

### Organise Plans in Teams

- Grouping tasks
- Filtering tasks
- Viewing the plan as a list
- Use a chart to view progress
- Use the schedule view

### The Planner App

- Work with the Planner Hub
- Mark a plan favourite
- Display a summary card

### Planner App Options

- Copy a plan
- Export a plan to Excel
- View the My Tasks area
- Change My Task views
- Link a plan to Outlook calendar
- Adding colours and charms

### Q&A

Our hands-on training course is ideal for users new to Microsoft Planner. You'll learn how to use the Planner hub to create plans, organise and assign tasks, as well as track progress through easy-to-read dashboards.

