www.sstslo.com
info@sstslo.com

SOFTWARE SOLUTIONS TEAM
TRAINING - CONSULTING

3220 S. Higuera St., Ste. 208
San Luis Obispo, CA 93401
Ph 805.786.4283

Course Description and Outline

Microsoft Planner Essentials

Days: 1/2

Prerequisites or Equivalent Skills: Windows and basic use of MS Office applications including Outlook.

Course Description:

MS Planner is an Office 365 application for 'light' project management. Planner makes it easy for your team to create new plans, organize and assign tasks, share files, chat about what you are working on, and get updates on progress. Each plan has its own board, where you can organize tasks into buckets. You can categorize tasks based on their status or on whom they are assigned to. After completing this course, you will know how to:

- Understand the Planner Dashboard and Planner Hub
- Create Plans, Buckets, and their associated Tasks
- Add Task details and related Files, and Assign Tasks
- Understand and manage Plan Views: Board, Chart, and Schedule

Course Outline:

Unit 1 : Planner Dashboard Hub

- Understand Plan Navigation pane
- Plan Overviews
- My Tasks

Unit 2 : Anatomy of a Plan

- Plan Names
- Use Buckets to organize Tasks
- Tasks
- Checklist Items

Unit 3 : Creating Plans

- Create a Plan
- Add People to a Plan
- Set up Buckets
- Add Tasks to a Bucket

Unit 4 : Working with Buckets

- Create Buckets to organize Tasks
- Reorder Buckets
- Rename Buckets

Unit 5 : Working with Tasks

- Completing Task details
- Add attachments to Task
- Work with Labels
- Assign Tasks and understand Task Notifications
- Working with Checklist Items

Unit 6 : Manage Tasks

- Reorder Tasks
- Change Task Assignments
- Change Task Status or Priority

- Copy Tasks

Unit 7 : Work with Plan Views

- Switch between the Board, Chart, and Schedule View
- Filter and Groupings by View
- Create Start/Due dates for Unscheduled Tasks in Schedule View

Unit 8 : Explore Plan Resources

- Work with Plan Files, Members, Notebook, and Site
- Copy Plan, or Copy Link to Plan
- Plan settings