



Microsoft® 365 Planner

Training Course Content

Course Objective: Students will be able to create, modify, delete, organize, and customize different types of Plans. Learn how you can easily assign and manage your tasks, collaborate with others, and share progress. You will learn how to set up notifications and integrate Planner using other Microsoft 365 applications.

Prerequisites: To ensure your success, each student should have a general knowledge of Windows, Web browsing and Microsoft Office concepts, but not required.

Lesson 1: Getting Started with Microsoft Planner

- Overview of Planner
- Sign In to Microsoft Planner
- Navigate in the Planner App

Lesson 5: Monitor Plan Progress

- View Progress on Plans
- Show Visual Progress Charts
- Set Up Favorite Plans
- Manage Emails and Notifications

Lesson 2: Create and Manage Plans

- Create a Plan using Planner
- Assign Members to a Plan
- Manage Plans
- Delete Plans

Lesson 3: Manage Tasks

- Create New Tasks in a Plan
- Assign Tasks to People
- Assign Due Dates to Tasks
- Set Up and Manage Tasks in Buckets
- Manage, Edit and Delete Tasks
- View and Update Tasks Status

Lesson 4: Team Collaboration and Sharing

- Attach Files to Tasks
- Start Team Conversations
- Set Up Notifications
- Integrate Planner with other Office 365 Apps