

Microsoft Planner

January 2025



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Introduction

This course is designed to teach project managers how to create, update and manage project schedules with Microsoft Planner. Participants will learn how to create new plans, enter tasks, work with boards, set dependencies in the new timeline, create dependencies and manage resource assignments. You will also learn how to analyze and manage resources, set baselines, track and manage progress and generate reports. Using checklists, labels and notifications will also be covered. This course also covers high level Administrator topics to give users a complete understanding of Planner.

Audience

This course is intended for project managers and team leads who will be working with Planner and will be responsible for creating and managing plans and projects with Planner. This course does not assume any previous knowledge of Microsoft Planner but a basic understanding of MS 365 and other Microsoft applications will be helpful. This course covers assumes you have the Planner Premium license (P1).

At Course Completion

After completing this course, students will have covered the following modules and topics:

Introduction: Welcome to Microsoft Planner (P1)

Module 1: Creating and Managing Plans

Module 2: Using Boards

Module 3: Collaborating with Teams

Module 4: Using the Timeline

Module 5: Managing People and Groups

Module 6: Working with Goals

Module 7: Managing Assignments

Module 8: Reporting & Administering Planner

Microsoft Planner Fundamentals	
Module	Topics
Introduction: Welcome to Planner	I.1- Overview and Benefits I.2- Licensing and Planner (P1) I.3- Logging in and Teams
Module 1: Creating and Managing Plans	1.1- Using Grids and Boards 1.2- Creating Tasks 1.3- Using Labels with Tasks 1.4- Using Comments
Module 2: Using Boards	2.1- Attaching Files, Photos and Links 2.2- Managing Checklists 2.3- Planner Notifications
Module 3: Collaborating with Teams	3.1- Managing All Plans and Tasks 3.2- Navigating Planner and Teams
Module 4: Using the Timeline	4.1- Managing Task Details 4.2- Setting Task Dependencies 4.3- Using the Gantt Chart
Module 5: Managing People and Groups	5.1- Managing Groups 5.2- Working with People Views
Module 6: Working with Goals	6.1- Adding Goals 6.2- Managing Goals
Module 7: Managing Assignments	7.1- Using Group by Resource 7.2- Using Group by Task 7.3- Using View Options
Module 8: Reporting and Administering Planner	8.1- Reporting with Planner 8.2- Administering Planner 8.3- Plan Creation & Guests