

Microsoft Planner and Teams 365 Level 1 Course Outline

Duration: 1 Day

Streamline your project management and collaboration skills with Microsoft Planner, To Do, and Teams. Learn to create and assign tasks, track progress, and collaborate effectively across tools. Whether managing personal to-do lists or team projects, this Planner and Teams 365 training course equips you with the knowledge to maximise productivity and teamwork in Office 365.

What You'll Learn

- Create and manage plans, tasks, and buckets in Microsoft Planner
- Use To Do to organise and sync your task lists across devices
- Collaborate efficiently with Teams, including messaging, meetings, and shared plans
- Integrate Planner with Teams to enhance project collaboration
- Leverage reporting tools like charts and schedule views for better tracking

Course Prerequisites

This course is suitable for new or experienced Office users looking to improve project management and collaboration. Delegates should have:

- **Basic computer skills:** Familiarity with using a PC or Mac, including navigating with a mouse or equivalent device.
- **Internet know-how:** Confidence in accessing the internet and downloading files as needed

Full Course Outline

Microsoft Office 365 Planner

Plan Management
Creating and deleting plans
Adding and removing members
Changing plan settings and appearance

Task Management

Adding and updating tasks with descriptions, checklists, and attachments
Setting task priorities and labels
Communicating within tasks

Using Buckets

- Creating buckets and assigning tasks
- Moving tasks between buckets

Plan Views and Reports

- Using Group By and filters
- Viewing progress with schedule and charts
- Exporting plan data to Excel

Planner Hub and Sharing

- Using the Planner Hub
- Adding plans to Teams and sharing links

What is To Do?

- Creating and managing task lists and tasks
- Using My Day and planning tasks

Microsoft Office 365 Teams

- Teams Basics
- Sending messages, adding pictures and hyperlinks
- Creating polls, announcements, and managing teams

Teams Meetings

- Scheduling and joining meetings with virtual backgrounds
- Sharing screens, recording, and transcribing meetings

Teams and Planner Together

- Adding and using Planner in Teams
- Using shared plans and managing updates

Training Benefits

Comprehensive training materials: Access detailed notes and exercise files for future reference.

Post-training support: Enjoy three months of assistance via email, phone, or screen sharing for follow-up questions.

Certificate of completion: Celebrate your achievement with a certificate that recognises your effort and skills.

Practical learning environment: Experience hands-on training designed to build confidence and inspire trust.