

# Planner Training: Getting Started with Microsoft Planner

## Module 1: Introduction to Microsoft Planner

- Role of Planner within the Microsoft 365 ecosystem
- Access via browser, Teams, and mobile app
- Typical use cases: simple task management, team projects, routine tracking

## Module 2: Creating a Plan

- Create a new plan via Planner or Teams
- Choose or create a Microsoft 365 group
- Understand the structure: buckets and tasks

## Module 3: Task Management

- Create and edit a task
- Assign a task owner
- Add: due date, priority, checklist, attachments, notes
- Track progress (Not started, In progress, Completed)

## Module 4: Visual Organization

- Create buckets to structure project phases
- Use color-coded labels
- Rearrange tasks via drag-and-drop in Board view

## Module 5: Basic Collaboration

- Comment on tasks
- Understand automatic notifications
- Integrate Planner into Microsoft Teams (tab, simplified view)

## Module 6: Guided Hands-on Practice

- Create a mini project in pairs or groups
- Apply the features covered
- Open discussion and Q&A