

A top-down view of a workspace. In the upper left, a white smartphone lies vertically. Next to it is a black pencil. To the right, an open notebook with a pair of black-rimmed glasses resting on its pages. Below the notebook is a white computer keyboard. In the bottom right corner, a white ceramic coffee cup is partially visible. The entire scene is set against a dark, textured background.

Mastering Task Management with Microsoft Planner and Microsoft Project

Streamline Your Workflow and Enhance Productivity

Agenda

Part 1: Introduction to Microsoft Planner (1 hour)

- Overview of Microsoft Planner
- Setting up Microsoft Planner
- Creating a new plan
- Adding members to a plan
- Creating tasks and assigning them to members
- Using labels and buckets for task organization

Agenda

Part 2: Advanced Features of Microsoft Planner (1 hour)

- Attaching files and links to tasks
- Commenting and collaborating on tasks
- Tracking progress with Planner's built-in charts
- Integrating Planner with Microsoft Teams
- Exporting Planner data to Excel for further analysis

Agenda

Part 3: Introduction to Microsoft Project (1 hour)

- Overview of Microsoft Project
- Creating a new project
- Adding tasks, durations, and dependencies
- Assigning resources to tasks
- Using the Gantt chart view for project visualization

Agenda

Part 4: Advanced Features of Microsoft Project (1 hour)

- Tracking project progress and updating task status
- Resolving resource conflicts
- Using the timeline view for high-level project overview



Introduction to Microsoft Planner

- **Microsoft Planner** is a task management tool included in the Microsoft 365 suite. It is designed to help teams and individuals organize, assign, and track tasks in a visually intuitive way.

Setting up Microsoft Planner

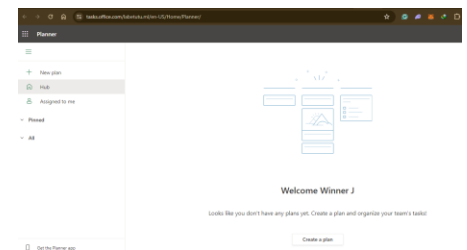
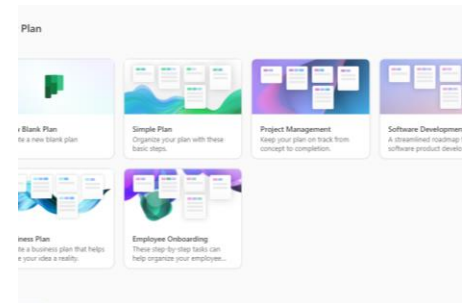
Sign into your Microsoft 365 account. Using office.com

Open the app launcher (the grid icon) in the top left corner and select "Planner" from the list of apps.

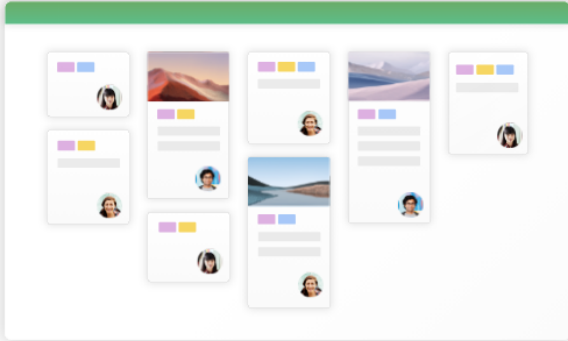


Creating a new plan

- Once you are signed in Click the "Create a Plan" button. Then select New Blank Plan



< New blank plan ×



Name your plan

▼

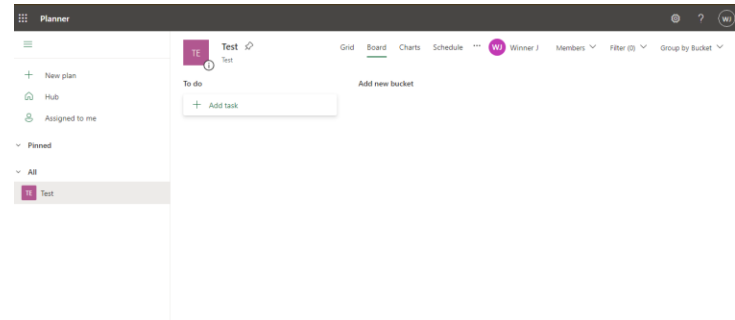
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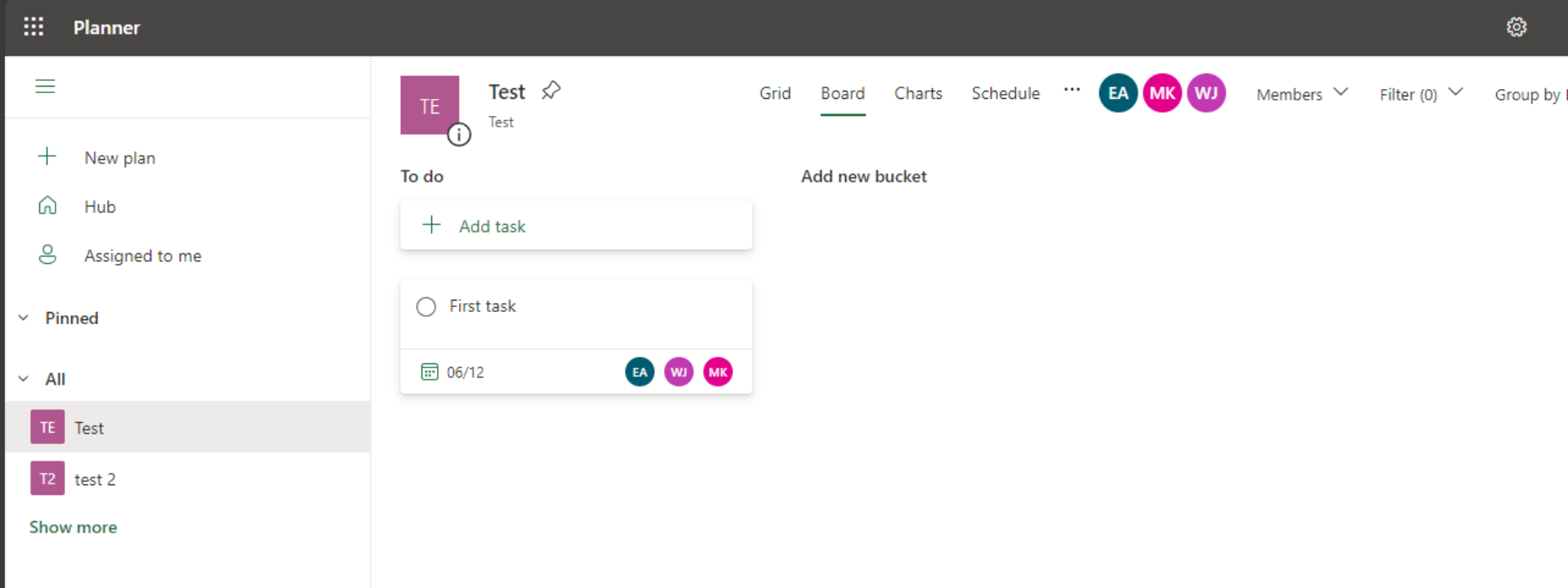
- Once you click on create
- You will have to give it a name
- Add it to a group (optional)
- and set the privacy to either Public or Private

Creating a new plan

Adding members to a plan



- Once the plan is created, you can add members by typing their names or email addresses into the "Members" box on the right side of the screen.
- This allows you to assign tasks to these members and collaborate with them.



Creating tasks and assigning them to members

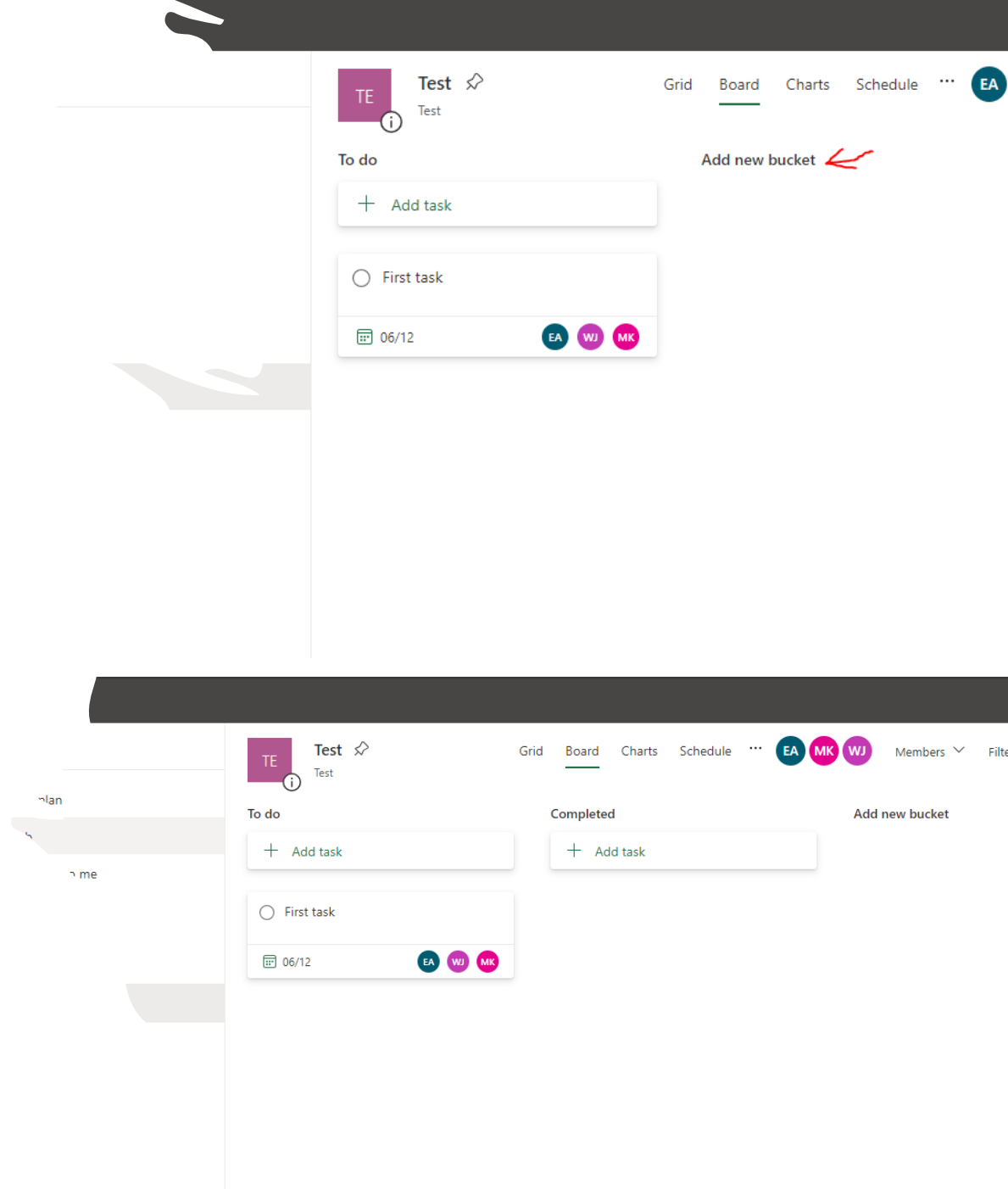
- Click on the "+" button under the bucket where you want to add a task.
- Enter a task name and press "Enter" to create the task.

Using labels and buckets for task organization

Using labels and buckets in Microsoft Planner is an effective way to organize and categorize tasks, making it easier to manage projects and workflows.

How to create bucket

- Click on Add new bucket highlighted with the red marker
- Enter a name for the bucket (e.g., "To Do," "In Progress," "Completed," "High Priority," "Low Priority").



Organize Tasks into Buckets

1

Create tasks and assign them to the appropriate buckets by clicking the "+" button under each bucket.

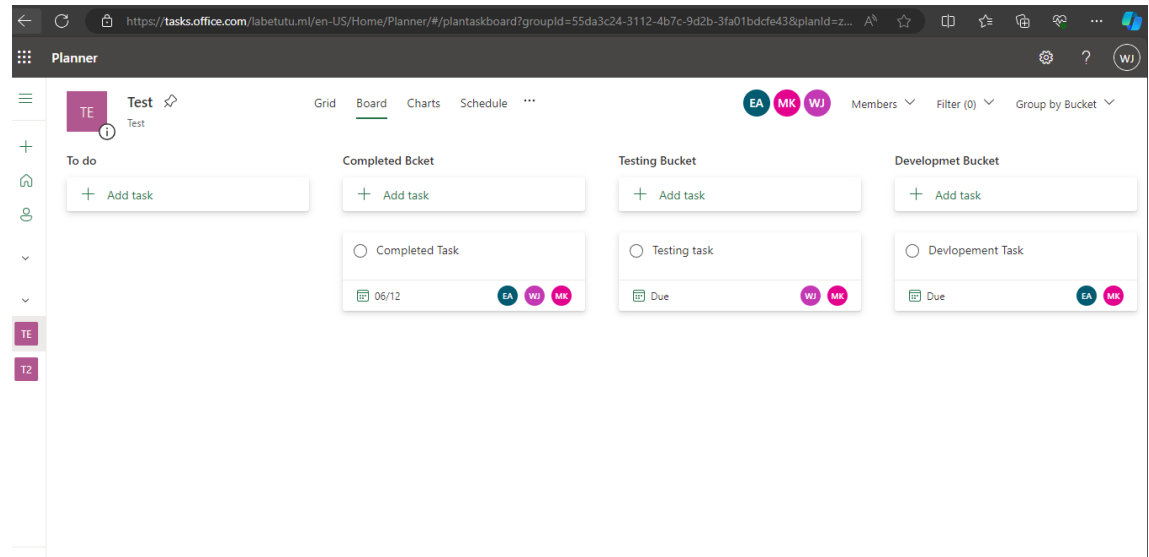
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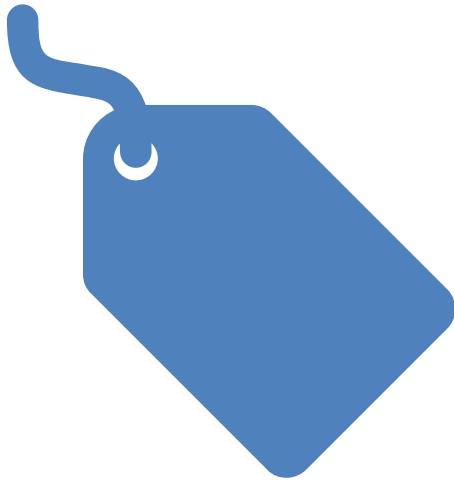
Drag and drop existing tasks between buckets as their status or priority changes.

3

Use buckets to represent different stages of a workflow (e.g., "Backlog," "Design," "Development," "Testing," "Deployment").

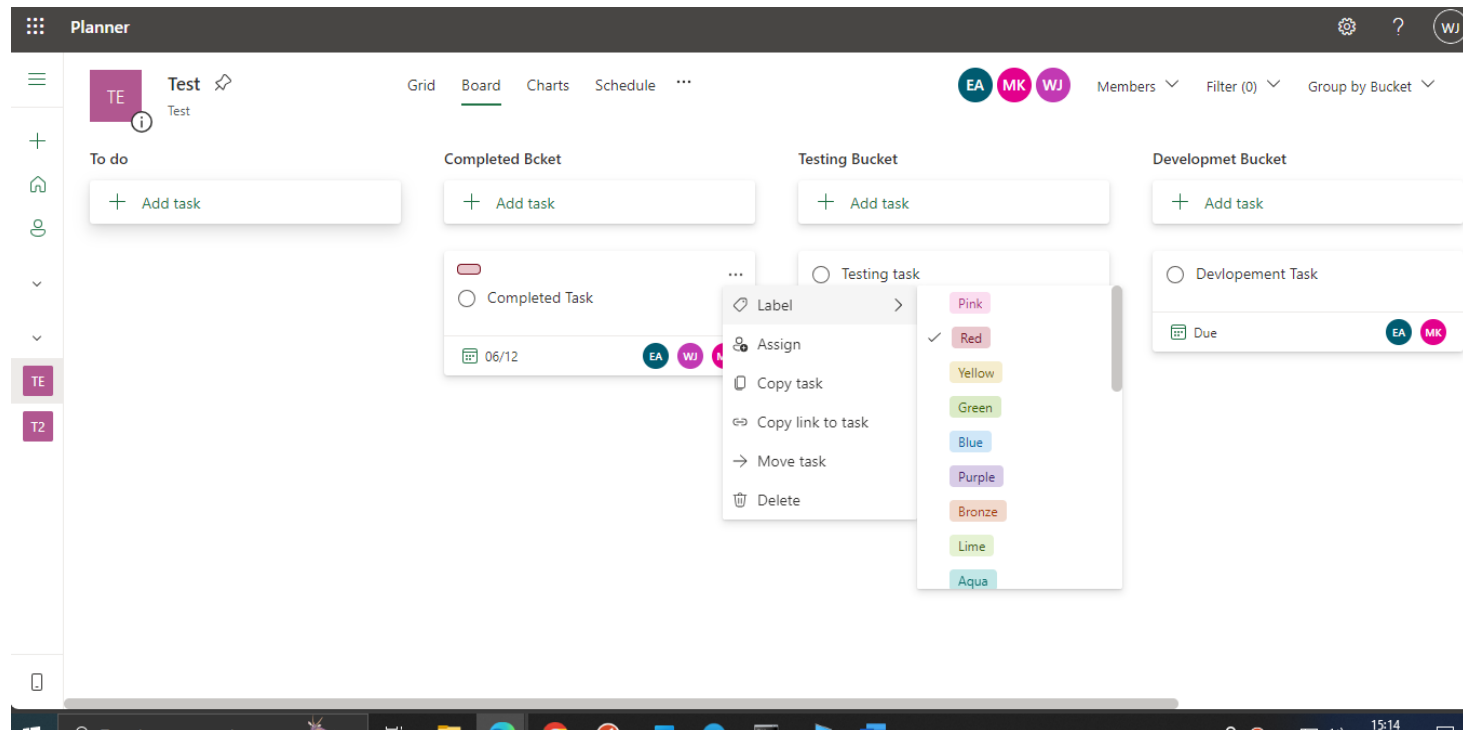
Organize Tasks into Buckets - Contd





Using Labels for Task Categorization

Labels in Microsoft Planner are color-coded tags that you can apply to tasks to add another layer of organization and categorization. Labels can represent anything from task priority to project phase, or specific color tags relevant to your plan.



Add and Edit Labels:

- Click on a task to open the task details pane.
- In the task details pane, you'll see a section labeled "Labels" with several colored circles.
- Click on a colored circle to assign a label to the task.
- To rename a label, click on the pencil icon next to the label name and type in your desired label name (e.g., "Urgent," "Feature," "Bug," "Client Request").










Test

○ Testing task

last changed moments ago by you



Testing X Search for label

Bucket	Pink		Priority
Testing Bucket	Done		Medium
Start date	Yellow		Repeat
Start anytime	Green		Does not repeat
Notes	Blue		
Type a description	Purple		
	Bronze		
	Lime		
	Aqua		

↓

Add and Edit Labels:

- To rename a label, click on the pencil icon next to the label name and type in your desired label name (e.g., "Urgent," "Feature," "Bug," "Client Request").

Example Setup

Buckets:

- "To Do"
- "In Progress"
- "Completed"
- "Backlog"
- "Review"
- "Urgent"

Labels:

- Red: "High Priority"
- Yellow: "Medium Priority"
- Green: "Low Priority"
- Blue: "Client Request"
- Purple: "Internal Task"
- Orange: "Bug Fix"



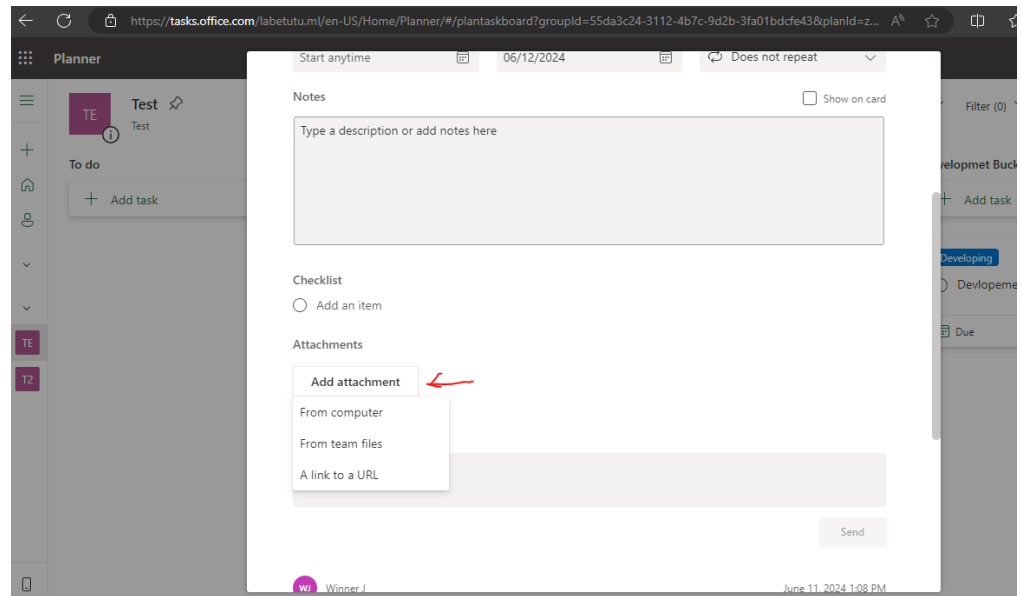
Part 2: Advanced Features of Microsoft Planner

Attaching files and links to tasks allows team members to access relevant documents and resources directly within the task, facilitating easier collaboration and reference.



Steps to Attach Files and Link

- Open a task in Planner.
- Scroll down then click on the "Add attachment" button.
- Choose from:
- **Upload from computer:** Select a file from your local device.
- **Attach from OneDrive:** Select a file from your OneDrive storage.
- **Link:** Add a URL link by entering the URL and providing a display name.

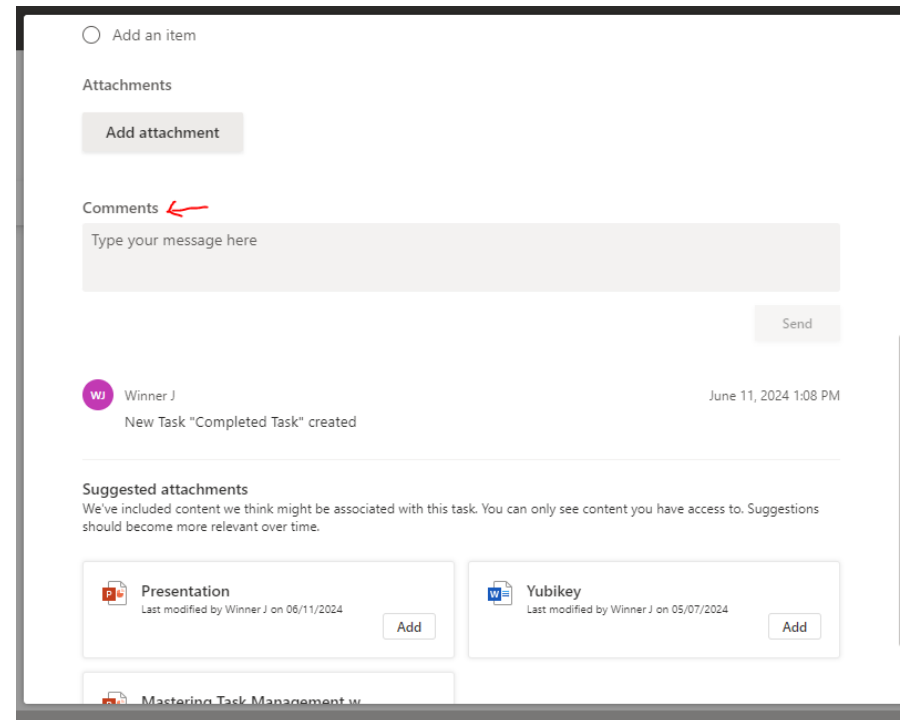


A 3D rendering of a grey puzzle with one red piece standing out. The red piece is in the center, and the text is overlaid on it.

Commenting and Collaborating on Tasks

Comments within tasks allow team members to communicate, ask questions, provide updates, and share feedback directly within the task.

- Open a task in Planner. Scroll down to the "Comments" section.
- Enter your comment in the text box and click "Send."




The screenshot displays the Microsoft Planner interface for a task. At the top, there is a radio button labeled "Add an item". Below this is the "Attachments" section with a grey "Add attachment" button. The "Comments" section is highlighted with a red arrow and contains a large text input area with the placeholder "Type your message here" and a "Send" button to its right. Below the comments section, a notification from "Winner J" is shown, stating "New Task 'Completed Task' created" with a timestamp of "June 11, 2024 1:08 PM". The "Suggested attachments" section follows, with a sub-header and explanatory text. It lists three suggested files: "Presentation" (a PowerPoint icon), "Yubikey" (a Word icon), and "Mastering Task Management.w" (a Word icon). Each file entry includes the name, a "Last modified by Winner J" timestamp, and an "Add" button.

☐ Add an item


Attachments

Add attachment




Comments 

Type your message here

Send

 Winner J June 11, 2024 1:08 PM
New Task "Completed Task" created

Suggested attachments
We've included content we think might be associated with this task. You can only see content you have access to. Suggestions should become more relevant over time.

Attachment	Last modified by	Action
 Presentation	Winner J on 06/11/2024	Add
 Yubikey	Winner J on 05/07/2024	Add
 Mastering Task Management.w		

Collaboration Features:

- Real-time updates and notifications for comments.
- Activity log showing all comments and actions taken on the task.

Tracking Progress with Planner's Built-in Charts

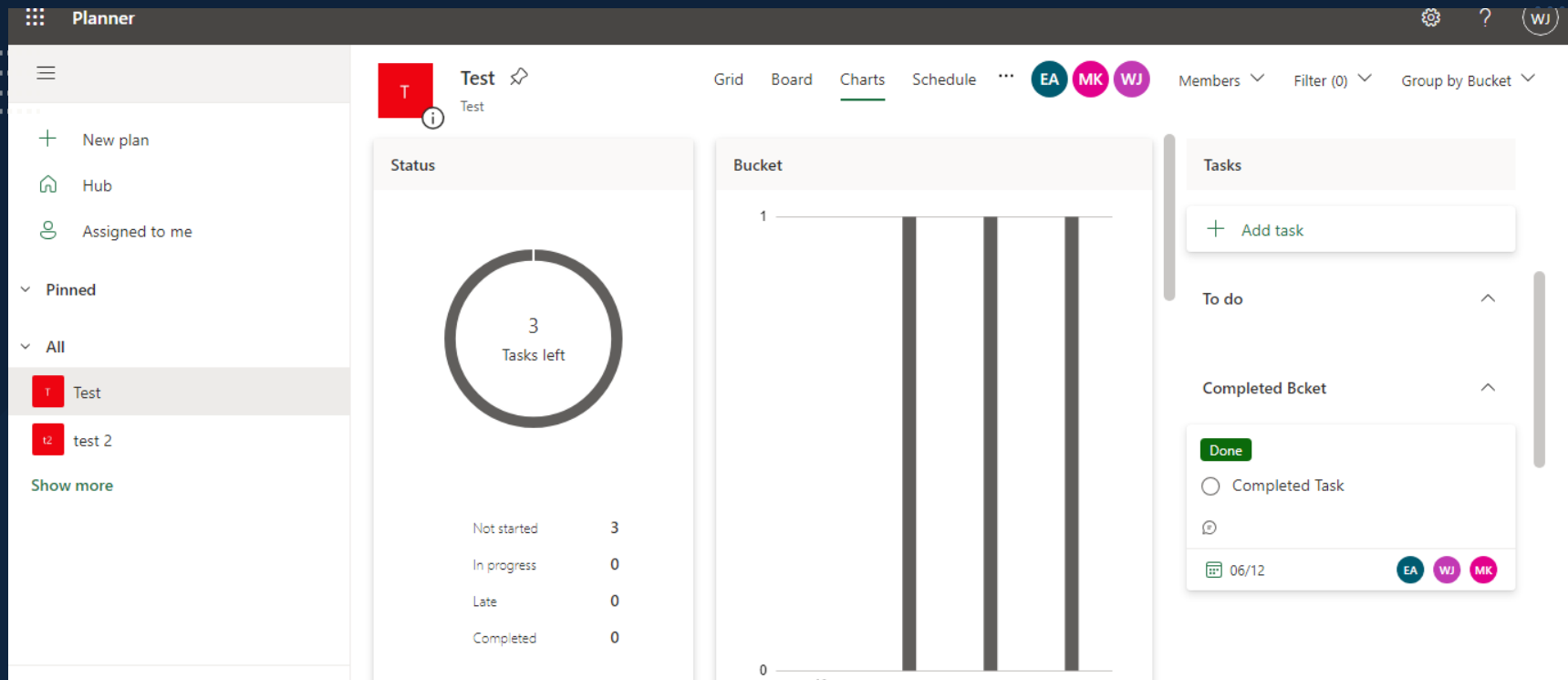




Planner provides built-in charts that visualize the progress of tasks within a plan, helping teams monitor workload and task completion.

Types of Charts

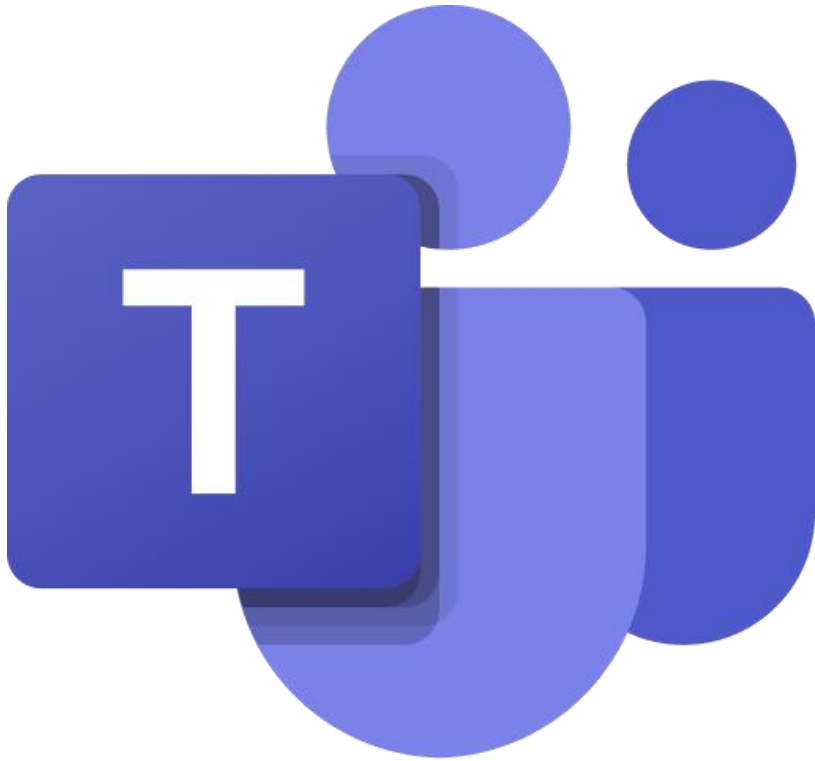
- **Status Chart:** Shows the distribution of tasks by status (Not Started, In Progress, Completed).
- **Bucket Chart:** Displays tasks categorized by buckets.
- **Priority Chart:** Shows tasks grouped by priority levels.
- **Members Chart:** Visualizes the number of tasks assigned to each team member.



Accessing Charts

- Open your plan in Planner.
- Click on the "Charts" tab to view the visual representations.

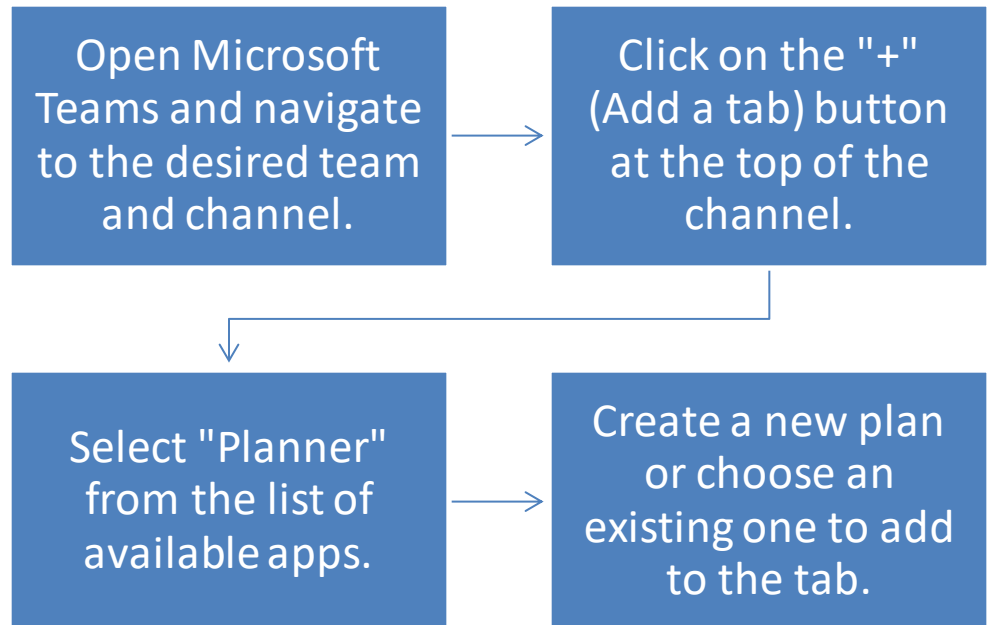
Integrating Planner with Microsoft Teams



Integrating Planner with Microsoft Teams

Integrating Planner with Microsoft Teams allows teams to manage tasks directly within their Teams environment, enhancing collaboration and accessibility.

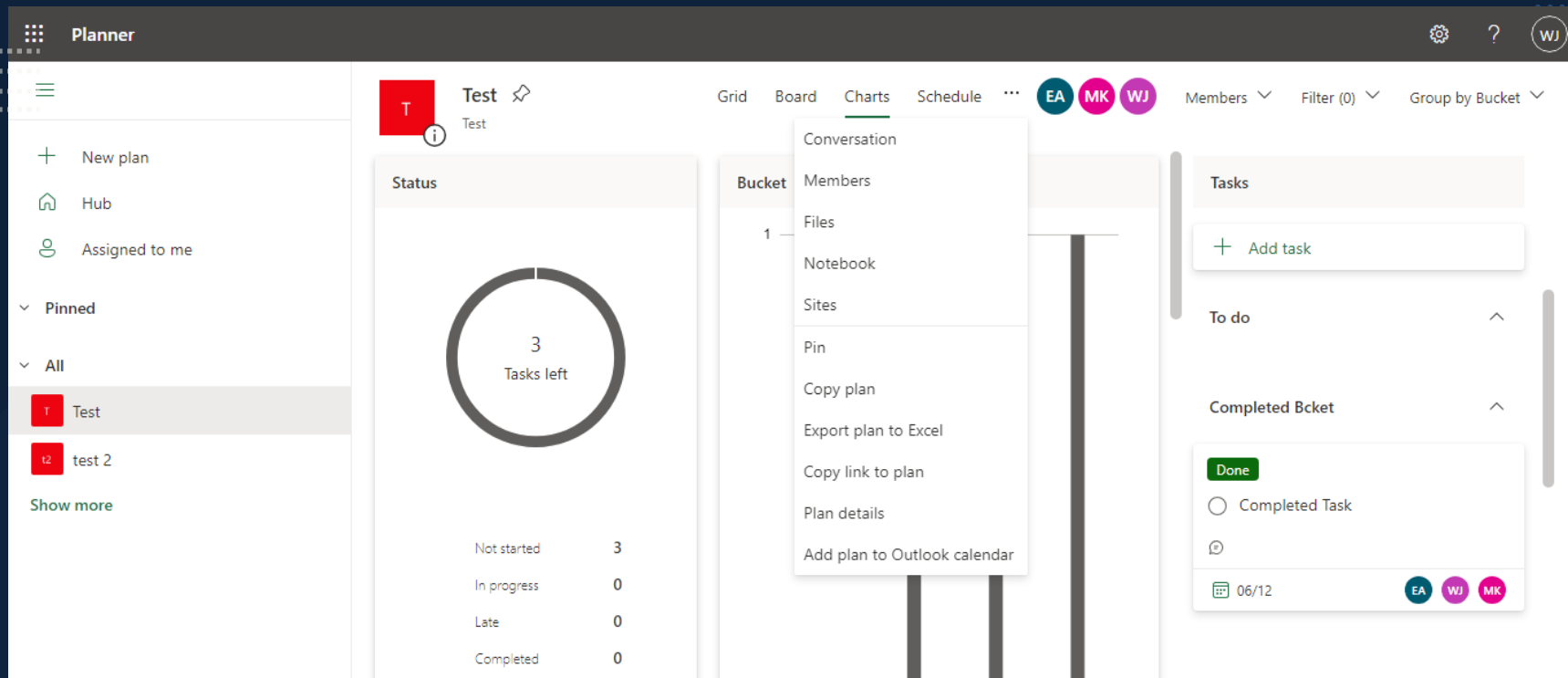
Steps to Integrate:



Exporting Planner Data to Excel for Further Analysis

Exporting Planner Data to Excel for Further Analysis

Exporting Planner data to Excel allows for advanced analysis, reporting, and customization of task data beyond what is available in Planner.



Steps to Export Data

- Open your plan in Planner.
- Click on the "..." (More options) button at the top right of the plan.
- Select "Export plan to Excel."
- Open the downloaded Excel file to view and analyze the data.