



Education and Support for SharePoint, Office 365 and Azure
www.combined-knowledge.com

COURSE OUTLINE

BITESIZED PLANNER & FORMS

Course Duration: 2 hours

Overview

Discover the power of managing and reporting on tasks using Microsoft Planner as well as creating engaging surveys, or fun quizzes in Microsoft Forms.

Audience

Provide the knowledge and practice to use Office 365 Planner and its components efficiently and effectively at an introductory level and to enhance collaboration.

Prerequisites

No previous knowledge or experience of Microsoft Planner or Microsoft Forms is required, experience using Microsoft Office applications such as Word, Excel and Outlook would be an advantage but not necessary.

Outcomes:

By the end of the session the you will be able to do the following

Planner:

- Create plans to organise your daily tasks
- Delegate and track members tasks
- Track task progress in planner
- Utilise the Office 365 tools in Planner

Forms:

- Create a survey with multiple questions
- Customise how your form look and feels
- Share your survey/quiz
- View and download your form/quiz responses

The course will cover the following content:

Planner:

- Introduction to Planner
- Accessing Planner
- Planner home page
- Plan Page
- Planner Buckets
- Task overview
- Assigning tasks
- Filtering tasks
- Charts
- Create plan in Microsoft Teams channel
- Add your plans to favourites
- Delete Tasks
- Delete Plans

Forms:

- Introduction to Forms
- Accessing Microsoft Forms
- Forms home screen
- Form vs. Quiz
- Edit the title and description
- Questions and responses
- Question and response options
- Question types

- See how your forms looks
- Change your forms theme
- Share your Form
- Forms in Teams
- View your form's responses
- Additional form settings
- Organise your Forms/Quizzes

Your Learning Roadmap: What Next?

If you have completed this class or you have equivalent knowledge, we recommend looking at our course outlines for the following classes to enhance your knowledge:

Office 365 Users

- Office 365 Power User
- Rapid Upskill for Office 365
- Power Automate
- Power Apps
- Power BI

SharePoint Power Users

- SharePoint Online Power User
- Nintex Workflow
- Nintex Forms

SharePoint Farm Administrators

- Core Skills for Server Administrators
- Advanced Infrastructure
- Office 365 Identities and Services

SharePoint Developers

- Developer Track

The logo consists of the word 'training' in a white, lowercase, sans-serif font, followed by a white plus sign. The entire logo is enclosed in a white rectangular border with rounded corners, set against a solid orange background.

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