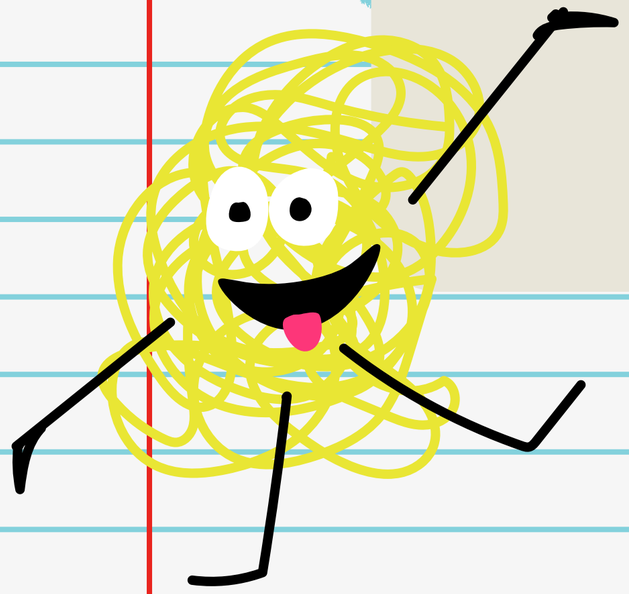
Process Templates in MS Planner

Increase Efficiency,
Reduce Errors, Save Time!

GWC Flex Day Fall 2026, Sally Heath - MESA Director



AGENDA

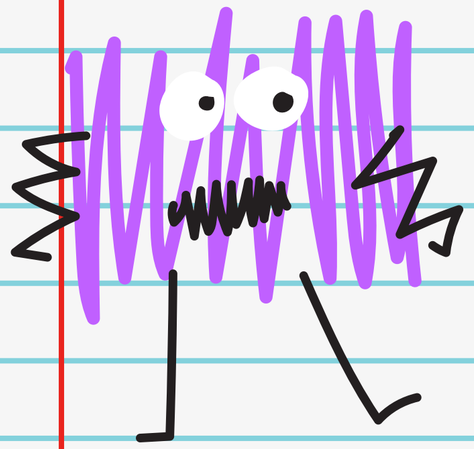
- Overview of MS Planner
- Creating & Tracking Tasks
- Process Template Examples
- Create Your Own!

Discussion

Share about a time you or someone on your team missed a step in a process

- what was it?
- what was the impact?
- how was the issue addressed?

USING MS TEAMS PLANNER



1. **Accessing MS Teams Planner**
2. **Navigating the Planner app**
3. **Creating a Team Plan**
4. **Creating Tasks**
    a. through the Planner
    b. through Emails
    c. through Teams Messages

Task components

1

Task Title

Immediately Recognizable

2

Assigning

Individual or Multiple people

3

Due Date

Can change as needed

4

Checklist

Subtasks - indiv dates, indiv assign

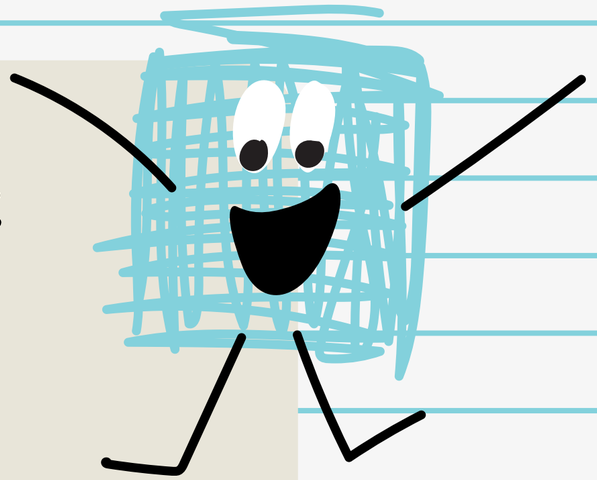
5

Notes

Description, links, attachments

EXAMPLES

- **Campus Approval Request**
- **New Student Onboarding**
- **Field Trip/Conference**
- **Purchase Orders**
  - PO
  - Open PO
  - Travel POR



Field Trips/Conf...

- Campus Appr TEMPLATE - Field Trip/Conference
  - Chris - Submit Campus Approval (route to Sally, Justin, VP Jen KG, Pr...
  - Chris - When approved, upload completed PDF to MESA files &...
  - Chris - add to GWC MESA calendar if not done already & invite relevant...
  - Chris - for events with registration or other fees, request Invoice or Quot...
  - Sally - submit requisition to pay invoice or fees
  - Chris - submit transportation request (bus or district van)
  - Chris - create Slate Sign-up (with VAR template) - in a way we can...
  - Chris - notify Sally when transportation rq approved
  - Chris/Sally - create agenda/timeline for the day, share with students
  - Chris/Vina/Sally - have students complete field trip permission forms

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- TEMPLATE: CARs
  - Add Conference Dates and Information to CAR
  - Download conference agenda, registration price, parking, hotel, et...
  - Add supporting docs and CAR to one form
  - Make finalized CAR a FLAT document
  - Upload to Adobe Sign for Justin and Meridith Signatures
  - Download signed file once complete
  - GWC-DEPT-Office of the President --> Shared Files --> Travel folder -->...
  - Copy link --> go back to Travel folder and open CAR Spreadsheet -...

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New Student O...

- New Student: Name (TEMPLATE)
  - Folder created (Vina)
  - Orientation (Team)
  - Forms (Orientation lead)
  - SEP upload to student folder (Vina)
  - Transcript upload to student folder (Sally)
  - MESA New Student Checklist/Contract signed by Sally
  - Canvas invite (Chris)
  - GWC App invite (Chris)
  - SARS alert (Vina)
  - MIS (Sally)

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Purchasing Template: Supply Order (non-Open PO)

- [ ] Request Quote from company (or multiple companies if above $XX)
- [ ] Submit Requistion in Banner Finance (PO by line item)
- [ ] Send Requisition Supporting Documentation (quote) to...
- [ ] Update Budget Tracking Spreadsheet with Req # and date submitted
- [ ] Update Budget Tracking Spreadsheet with Req Approval date
- [ ] Update Budget Tracking Spreadsheet with PO # and issue date
- [ ] PO issued to Company (watch for email from Purchasing)
- [ ] Items delivered (or picked up)
- [ ] Email Esteban/M&O that Items have been received
- [ ] Receive (request) final invoice from company

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Purchasing Template: Open PO

- [ ] Request Quote from company (or multiple companies if above $XX)
- [ ] Update Budget Tracking Spreadsheet with Quote amount & remaining P...
- [ ] Items delivered (or picked up)
- [ ] Email Esteban/M&O that Items have been received
- [ ] Receive (request) final invoice from company
- [ ] Send Invoice Approval message to APShare@cccd.edu
- [ ] Charge applied to FOAP

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Purchasing Template: Travel POR

- [ ] Request Quote/Invoice from company
- [ ] Complete Travel POR form - include all attachments (CAR, Invoice, Roste...
- [ ] Send form to Supervisor to Sign & Return to you
- [ ] Send signed form to Business Services for BSO Director to sign
- [ ] Update Budget Tracking Spreadsheet with date submitted
- [ ] Watch for email from BSO to <Travel? or AP Share?>
- [ ] Update Budget Tracking Spreadsheet with PO # and issue date
- [ ] PO issued to Company (watch for email from Purchasing)
- [ ] Charge applied to FOAP

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Your Turn!

What's a process you would like to create a template for?

Or: Ideas for how to improve any of the templates I've already created?

TEMPLATE IDEAS

MORE RESOURCES

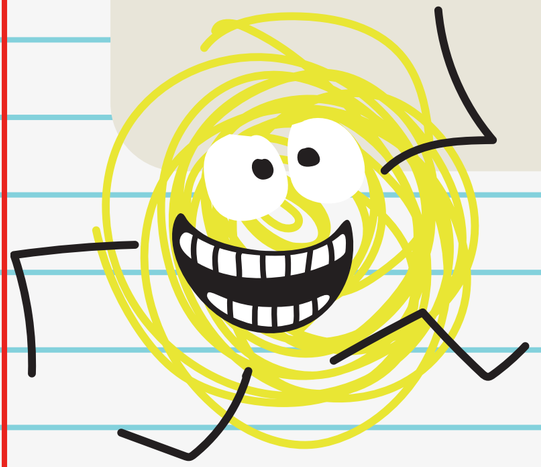
Getting Started with Planner in Teams

Create a Plan in MS Planner

Beginners Guide to MS Planner (video)

MS Planner Cheat Sheet

THANK YOU!

Reach out to me if you have
questions, ideas or want 1:1 help!

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