



Microsoft Planner Premium

Duration : 1 day

Overview

During this course delegates will learn how to create, manage, and track personal and team plans, integrate tasks with goals, and visually monitor progress using the enhanced features available in Microsoft Planner Premium. You will also learn how to integrate Planner with other Microsoft 365 apps, such as Outlook, Teams, and To-Do, to enhance your productivity and workflow.

Prerequisites

Delegates should be familiar with using computers and have used a mouse and keyboard. Delegates should be comfortable in the Windows environment and be able to use Windows to manage information on their computer.

Software

For courses delivered virtually or at a client's site, **each delegate will require a Planner Premium licence**. This is an additional licence to the standard Microsoft 365 License.

Objectives

Upon successful completion of this course, delegates will be able to:

- Understand when it is appropriate to use planner premium
- Create a basic plan
- To work with different Views
- Utilise advanced planner premium functionality
- Track progress
- Understand integration with other packages

Course Content

Exploring the planner environment

The difference between planner and planner premium

Understanding why we use planner premium
Understanding the different views

Working with tasks

How to add a task, set a due date, assign a task to someone and add a label

How to add additional details to a task

How to promote items in a checklist

How to attach files

Working with tasks, subtasks and milestones

How to add notes, attachments, URLs and checklists

Why you need to create groups of people to work with

Board View

An intro on working with the board view

Understanding Buckets

How to colour code buckets

Working with different groupings for buckets

How sprints can help progress in a project

Grid View

Working with the grid view

Why conditional formatting is useful in grid view



Timeline View

Working with the timeline view
How to create dependencies between tasks
How to add extra fields and customise them
How to work with filters
How to add labels
How to track progress

Chart and People Views

What the Chart view is for
What the people view is for

Working with Plans

How to rename, delete and change the start date of the plan
Integration with other M365 Apps
How roadmaps can combine multiple projects
How to create a new plan from scratch

Workshop

If time permits, the opportunity to start creating a plan of your own