Microsoft Planner *Premium*

Course Overview

Microsoft Planner Premium is the next evolution of Microsoft's task management tool, designed for teams who need more control, visibility, and automation in their work. It brings advanced project management features to the familiar Planner interface, bridging the gap between simple task boards and full-scale project management tools like Microsoft Project.

Note: Additional licence required.

Key Benefits

- Advanced timeline (Gantt) views for better project tracking
- Task dependencies and critical path management
- Custom fields and reporting
- Enhanced automation and integrations
- Enterprise-grade security and compliance
- Seamless integration with Microsoft Teams, Outlook, and Project for the web

Program Format

This is a 3-hour program that is delivered face-to-face or virtually.

Course Objectives

- Understand the new features and benefits of Planner Premium
- Create, manage, and track complex plans with advanced tools
- Use automation and reporting to save time and boost productivity
- Integrate Planner Premium with Teams, Outlook, and Project for the web

Course Outline

Understanding Planner Premium
What's new in Planner Premium?
Planner Premium vs. Basic Planner: What's the difference?
Where Planner Premium fits in the Microsoft 365 ecosystem

Creating Plans Plus
Creating a new plan (web, Teams, mobile)
Using templates and plan copying
Setting up plan privacy and permissions

Adding & Managing Members
Adding, editing, and removing members
Assigning roles and permissions
Guest access and external collaboration

Advanced Bucket & Task
Creating buckets and custom fields
Setting up task dependencies (predecessors/successors)
Using checklists, attachments, and labels
Assigning multiple users to tasks
Recurring tasks and milestones

Managing Plans Like a Pro
Timeline (Gantt) view: Visualising your project
Board, List, and Calendar views
Task filters, grouping, and sorting
Bulk editing and quick updates

Automation & Reporting
Understanding Power Automate integration Basic vs Premium
Setting up notifications and reminders
Generating reports and exporting to Excel
Tracking progress

Integration & Collaboration
Using Planner Premium in Microsoft Teams (Tasks app)
Linking plans to Outlook and Project for the web
Connecting with Microsoft 365 Groups
Sharing plans and tasks with stakeholders
Real-time collaboration and Q&A with Copilot (additional licence required)

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