Planner Premium

ClearCut IT TRAINING

Duration: 1 day

This course is aimed at delegates who want to learn the key features and functionality of the Planner App including Planner Premium. They will create, assign, and monitor the progress of project tasks and learn how Planner integrates with other areas of Microsoft 365 including Microsoft Teams, To Do, and Loop.

Learn:

- Features in Planner Online
- Create, assign and manage tasks
- Communicate about Tasks
- Features in Planner Premium
- Integration with other apps

Delegates wishing to attend this course should be comfortable with the basics of Microsoft Teams. An understanding of Project Management concepts is beneficial but not necessary. Delegates will need a Planner Premium license.

Topics

Introducing Microsoft Planner

- What is Microsoft Planner
- Access Planner Online
- Tour Planner

Features in Planner Online

- Open Existing Plans
- View Tasks Assigned to Me
- Create a New Plan
- Adjust Plan Settings
- Add a Smart Background
- Copy a Plan
- Export a Plan
- Add a Plan to Outlook
- Delete a Plan

Continued

Create, Assign and Manage Tasks

- Create Tasks
- Assign Due Dates
- Assign People
- Add a Checklist
- Assign Priority
- Add Labels
- Attach Files and Links
- Edit, Copy and Move Tasks
- Create Task Buckets
- Update Progress and Complete
- Work with Different Views
- Group and Filter Tasks

Communicate about Tasks

- Add Comments
- Task Notifications

Features in Planner Premium

- Timeline
- Assignments
- People
- Baseline
- Critical Path
- Reports
- Portfolios
- Goals
- Custom Calendars
- Task dependencies
- Milestones
- Custom Fields
- Copilot (Copilot license dependent)

Integration with Other Apps

- Microsoft Teams
- Microsoft To Do
- Microsoft Loop