1 DAY

MICROSOFT PLANNER PREMIUM



Corporate IT Course

COURSE OVERVIEW

This practical one-day course develops the skills needed to plan and manage more complex projects using Microsoft Planner Premium. Participants will compare Basic and Premium plans before creating and structuring a premium plan using tasks, subtasks, milestones, dependencies and time constraints. They will explore Grid, Board, Timeline, Charts and People views, customise plans with fields and conditional colouring, organise work into sprints and use Portfolios and Roadmap view to monitor multiple premium plans.

LEARNING OUTCOMES

- Distinguish between Basic and Premium plans and select the most suitable option for different types of work.
- Create and configure premium plans including plan details, groups, tasks, subtasks and milestones.
- Build and manage project schedules using Timeline view, dependencies, dates and time constraints.
- Customise and analyse project information using custom fields, filters, conditional colouring and Charts view.
- Manage workloads and track progress using People view, goals, assignments and project status information.
- Coordinate work across projects using sprints, Microsoft 365 integration, Portfolios and Roadmap view.

TOPICS COVERED IN THIS COURSE

Understanding Basic and Premium Plans
Compare the features, views and licensing available with Basic and Premium plans, and identify when Premium is the most suitable option.

Creating and Configuring Premium Plans
Create a Premium plan from scratch, change its name and start date, manage plan settings and understand how groups support collaboration.

Building the Project Structure
Use Grid view to create and organise tasks, subtasks and milestones, adding notes, URLs, attachments and checklists where required.

Scheduling with Timeline View
Display the project as a Gantt chart, create dependencies and apply dates and constraints to build and manage the project schedule.

Board View, Buckets and Labels
Use Board view to organise tasks into colour-coded buckets, apply labels and change groupings to create a clear visual overview.

Custom Fields, Filters and Conditional Colouring
Create custom fields, apply conditional colouring and use filters to highlight important information and tailor Grid view to the project.

Charts, People and Progress
Use Charts and People views to monitor project progress, review workload distribution, reallocate work and track activity against project goals.

Sprints, Microsoft 365 and Portfolios
Organise work into sprints, connect Planner with Microsoft 365 and use Portfolios and Roadmap view to monitor multiple Premium plans.

T | 01452 341869
E | info@elliott-training.co.uk
W | www.elliott-training.co.uk

learning without limits