

CTR-312 Microsoft Planner/Project Plan 3

About This Course

This hands-on workshop is designed to provide the knowledge required to create, edit, and manage project plans. Using Microsoft Planner (Premium) and Project, we work through the creation, modification, and updating of project plans. We also look at how collaborate regarding plans and tasks, how to report progress, and how to integrate with platforms such as Teams.

The course also covers monitoring of task/project plan alignment with organizational goals and strategy.

Audience Profile

The intended audience are users who are proficient in Microsoft 365 and Teams, and who need to create, manage, and update, relatively complex project plans. A basic understanding of project management principles and terminology is assumed.

Prerequisites

- Understanding of the Microsoft 365 platform.
- Ability to use Teams/Outlook/OneDrive/SharePoint.
- A basic understanding of Project Management fundamentals and terminology.

Agenda

Fundamentals

1. Microsoft 365 and Planner/Project Online – integration and interactions
2. Teams and Planner integration
3. Accessing Planner/Project directly (via a browser)
4. Creating new projects from templates
5. Creating new blank projects, and populating them
6. Creating tasks – in Grid, Board, and Timeline views
7. Summary and sub-tasks
8. Milestones
9. Managing Task Dependencies (moving from tasks to projects)
10. Using the Timeline views
11. People vs Task views
12. Assigning tasks and automatic email notifications
13. Board (Kanban) views – deep dive into the task cards (attachments, comments, checklists)
14. Bucketing and Filtering tasks
15. Customizing task data – adding/creating columns
16. Updating actuals – percentages, and effort hours
17. Conditional formatting
18. Creating Goals and linking tasks to goals
19. Charts
20. Defining and using “sprints”
21. Personalised views – My Plans, My Tasks, and My day
22. Copying plans
23. Exporting to Excel and PDF

Advanced Topics

1. Advanced Dependencies: SS, FF, FS, SF – with Leads and Lags
2. Critical Path usage
3. Custom calendars
4. Task History (identify changes to tasks)
5. Baselining tasks, comparing actual to planned
6. Visual Roadmaps of strategic goals – how multiple projects fit together
7. Resource assignment balancing
8. Submitting “actual” timesheets
9. Using Copilot with Planner
10. Advanced reporting