

PLANNER ADVANCED



Duration: 3 hours

Prerequisites:

- A valid Microsoft 365 account to activate and use Planner
- Computer (Mac/PC with Windows 11)
- A stable Internet connection to access the content

Teaching methods:

- Demonstration
- Training materials included

Recognized certificate upon completion: yes

Target audience:

- Businesses, professionals and teams in every field who want to centralize and manage their tasks, plans and projects in order to increase productivity and keep their activities running smoothly

Skills acquired at the end of the training of the training:

- Have an advanced understanding and command of planning with Planner
- Know how to integrate the tool into the Microsoft 365 ecosystem
- Be able to automate and manage a variety of processes

DESCRIPTION

Microsoft Planner is a state-of-the-art planning tool that helps businesses, professionals and teams manage tasks, plans and projects across all Microsoft 365 apps. It helps them meet deadlines, save time and collaborate effectively.

PROGRAM

1. Advanced Planner

- Review the different planner views (grid, board, schedule, people) and understand the purpose and relevance of each
- Explore the tool's architecture and its various components in depth
- Learn to sync tasks, plans, projects and components for real-time collaboration
- Explore and use the Copilot AI assistant to get more out of it in your tasks

2. Planner ecosystem

- Integrate the tool with various Microsoft 365 apps, including Outlook, Teams, Loop and Viva Goals

3. Automation and reports

- Create workflows with Power Automate: automatic notifications and syncing with the suite's other apps
- Create business intelligence reports with Power BI connected to Planner: real-time dashboards on task progress and workload by team, among others.

QUESTIONS AND ANSWERS

