



COLLEGE AFRICA GROUP

AI | TRAINING | CONSULTING | SKILLS DEVELOPMENT

Better Processes. Stronger Skills. Smarter AI.

Microsoft Planner Advanced

Your projects need dependencies, a critical path and a baseline, not just a task board

Premium project planning and control

Duration: One day | **Level:** Intermediate | **Delivery:** Onsite or virtual

The business problem

A simple task board is not enough when tasks depend on each other, deadlines move and management wants to know whether the project is still on track.

With Microsoft Project Online retired, many organisations need a practical way to plan and control projects in Microsoft Planner premium plans.

You need this course if...

- Project schedules are kept in spreadsheets that do not show dependencies
- You cannot see the critical path or the impact of a delay
- Workload across people is unclear
- Progress cannot be compared with the original plan
- You previously used Project Online or Project for the web

How this course solves it

This one-day, instructor-led course shows project coordinators, team leaders and managers how to plan, schedule and control projects using Microsoft Planner premium plans (formerly Microsoft Project for the web).

Delegates build a project schedule with a work breakdown structure, milestones and dependencies, identify the critical path, manage workload, save a baseline and track progress, working hands-on after each facilitator demonstration.

Who should attend?

- Project coordinators and project administrators
- Team leaders and managers responsible for delivery
- Former Project Online or Project for the web users

Prerequisites: comfortable with Planner basics as covered in Microsoft Planner Core Essentials. Delegates new to work breakdown structures, dependencies and baselines may benefit from a project-management fundamentals session first.

Licences: a Planner and Project Plan 3 licence per delegate is required for premium plans; a free trial may be available from Microsoft. Copilot features require a separate Microsoft 365 Copilot licence and are demonstrated only where licensed.

Course content

1. Introduction to Premium Plans

- From Project for the web to Microsoft Planner
- Basic and premium features compared
- Planner licences and starting a premium trial

2. Creating a Premium Plan

- Creating a premium plan, including from a template
- Setting the start date and working days
- Adding members
- Converting a basic plan to premium

3. Building the Task List

- Entering tasks in Grid view
- Duration, effort and dates
- Summary tasks and subtasks (work breakdown)
- Milestones
- Adding, hiding and rearranging columns

4. Linking Tasks with Dependencies

- What dependencies are
- Finish-to-start and other dependency types
- Lag and lead time
- Removing a dependency

5. Working with the Timeline

- Timeline (Gantt) view
- Changing dates and zooming the timeline
- Showing the critical path

6. Managing People and Workload

- Assigning people to tasks
- People view and Assignments view

7. Customising Your Plan

- Custom fields
- Conditional colouring
- Grouping, sorting and filtering

8. Goals, Sprints and Agile Planning

- Setting goals
- Planning in sprints

9. Tracking and Controlling the Project

- Updating progress
- Saving a baseline
- Reviewing task history
- Monitoring with charts

10. Portfolios, Reporting and Copilot

- Creating a portfolio and using the portfolio roadmap

- Exporting a premium plan to Excel
- Reporting with Power BI
- Copilot and the Planner Agent (where licensed)

Practical Workplace Application

Delegates build and control a realistic workplace project across the day, from task list and dependencies to baseline and progress reporting.

After the course

Delegates will be able to:

- Explain basic vs premium plans and the licence required
- Set up a premium plan with start date and working days
- Build a task list with summary tasks, subtasks and milestones
- Link tasks with dependencies, including lag and lead time
- Use Timeline view and identify the critical path
- Manage workload with People and Assignments views
- Save a baseline, update progress and review history
- Report with charts, portfolios, Excel and Power BI

Training format

Duration: One day

Delivery: Private onsite training or live virtual training

Approach: Facilitator demonstrates, then delegates practise hands-on

Certificate: Electronic attendance certificate

Planner pathway

Microsoft Planner Core Essentials

The foundation course: plans, buckets, tasks, views and team collaboration.

Next step

To book this course for your team, or to discuss a version tailored to your organisation, contact Arnold Muscat on 083 778 4903 or sales@collegeafricagroup.com.

Course page: collegeafricagroup.com/microsoft-planner-training/ | [What our clients say about us](#)

Regards

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