

# Microsoft Planner and Project for the Web

GoSkills online course syllabus

Friday, May 17, 2024

**Skill level**

Beginner & Intermediate

**Lessons**

41

**Accredited by**

CPD

**Pre-requisites**

None

**Versions supported**

Microsoft 365

**Video duration**

3h 34m

**Estimated study time**

16h for all materials

**Instructor**

Deborah Ashby

## Introduction

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### Course Introduction

An Introduction to Project for the Web and how it compares to other popular project management tools.

2

### What is Project for the Web?

An explanation of Project for the Web, what it is and why it is useful.

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### Planner vs Project Online vs Project for the Web

Understand the differences between Planner, Project Online, and Project for the Web.

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### Project Plans Explained

A short explanation of the differences between Project Plan subscriptions.

## Manage Tasks and Projects with Microsoft Planner

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### What is Planner and Why is it Useful?

Learn about Microsoft Planner, how to access it and why it is useful.

6

### Create a Plan

Create a new plan in Microsoft Planner from scratch.

7

### Create a Plan Based on an Existing Microsoft 365 Group

Create a new Outlook group plan and understand how Outlook groups interact with Microsoft Planner.

- 8 **Add Members to a Plan**  
Add colleagues as members of a plan.
- 9 **Create New Tasks and Edit the Details**  
Create a series of new tasks in the project plan and understand how to modify the details of existing tasks.
- 10 **Create and Sort Tasks into Buckets**  
Sort a list of tasks into labelled buckets to add structure and organization to a plan.
- 11 **Assign Labels to Tasks**  
Assign labels to tasks to visually organize them using colour.
- 12 **Update Task Progress and Priority**  
Understand how to update task progress, change the status and set a priority level.
- 13 **Access a Plan from Microsoft Teams**  
Create a new team in Microsoft Teams based off of an existing Outlook group plan.
- 14 **Grant Access to Plans**  
Grant access to external team members and guests.
- 15 **Receive Email Updates on Tasks and Plans**  
Modify settings to ensure updates are received when anything changes in tasks and plans.
- 16 **Export a Plan to Microsoft Excel**  
Know how to export a plan to Microsoft Excel for the purpose of deeper analysis.

## Project for the Web: The Basics

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- 17 **Launch Project for the Web and Explore the Interface**  
Learn how to access Project for the Web from within the Microsoft 365 hub.
- 18 **Notifications and Settings**  
Review notifications and settings and modify accordingly.

## Project for the Web: Create a New Project

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- 19 **Import a Project Plan**  
Learn how to import an existing Project Plan.
- 20 **Open a Project and View the Project Plan**  
Take a look at an existing project plan in Project for the Web to gain a greater understanding of the advantages and limitations of the application.
- 21 **Create a Project from a Template**  
Create a brand new project based off of an existing template.
- 22 **Create a Project from Scratch**  
Create a new project from scratch.

## Project for the Web: Add and Manage Tasks

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- 23 **Add Group Members**  
Add members to a Project plan.
- 24 **Customize Column Headings**  
Customize the column headings in grid view.
- 25 **Create New Tasks**  
Create and add new tasks to the project plan.
- 26 **Edit Task Details**  
Open and edit tasks to add more detailed information.
- 27 **Update Task Progress**  
Learn the numerous different ways to update a task's progress.
- 28 **Add Structure with Summary and Subtasks**  
Add structure to a project by creating summary tasks and subtasks.
- 29 **Add Attachments, Notes, and Checklist Items**  
Add notes, file attachments, and create a checklist of items for each task.
- 30 **Group Tasks by Bucket**  
Create buckets to group and organize tasks in a project.

- 31** **Make Adjustments in Timeline View**  
Learn how to view and work with tasks in Timeline view.
- 32** **Add Task Dependencies**  
Create task dependencies to define the order in which tasks should be completed.
- 33** **Share Projects and Tasks with Others**  
Share an entire project or individual tasks with other people.
- 34** **Create a Project Roadmap**  
Understand what roadmaps are and how we can use them to monitor important tasks across all projects.
- 35** **Visualize Projects in Microsoft Teams**  
Learn how to add a project plan to a channel tab in Microsoft Teams.
- 36** **Project for the Web Extra Features**  
A run-through of some additional features in Project for the Web.

## Project for the Web: Overview of the Power Platform

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- 37** **Overview of the Power Platform**  
Understand what the Power Platform is and why it is important when working with Project for the Web.
- 38** **The Dataverse and the Power BI Project Report Template**  
Connect Project for the Web to Power BI and learn how to use the Power BI report template to quickly create multiple insightful reports.
- 39** **Create Reports and Dashboards with Power BI: Part 1**  
Get familiar with the basics of Power BI and learn how to make minor modifications to reports and visualizations.
- 40** **Create Reports and Dashboards with Power BI: Part 2**  
Learn how to create a dashboard based off of report data.

## Course Close

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- 41** **Course Close**  
Course close and instructor goodbye!

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