

Microsoft Planner and Project for the Web

GoSkills online course syllabus

Wednesday, August 14, 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

1

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.

3

Planner vs Project Online vs Project for the Web

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

4

Project Plans Explained

A short explanation of the differences between Project Plan subscriptions.

Manage Tasks and Projects with Microsoft Planner

5

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

- 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

- 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

- 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

- 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

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

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