

Projects — Learning Path

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This learning path is for project team members who need to find, review, and maintain project records in the Projects app. After completing it, learners will be able to navigate from the project record list to an individual project, review project information, update records when authorized, and perform consistent record-review routines.

Learning objectives

- By the end of this path you can locate a project record from the available project record list.
- By the end of this path you can open and review an individual project record.
- By the end of this path you can distinguish between using the list-based record view and the editable project record.
- By the end of this path you can update a project record when you have the appropriate access.
- By the end of this path you can use a repeatable process to review project records for ongoing work.

Prerequisites

- Access to the Projects app.
- Permission to view Projects records.
- Permission to edit Projects records if you will be making changes.
- Familiarity with the projects your team is responsible for reviewing or maintaining.

Module 1: Find and understand project records

Goal: Learn how project records are presented and how to open the record you need.

Lesson 1.1: Start from the project record list

When you need to work on a project, first identify the correct record from the available project records. Open the [Project List](#) list view and use the records shown there to locate the project you need. Select the relevant project record to move from the list context into the individual record context.

Practice task: Open [Project List](#) and select a project record you recognize.

Lesson 1.2: Review an individual project record

After opening a project, your immediate goal is to understand the information currently recorded before taking action. Open the **Projects record** and review the project information presented in the record. Use this review to confirm that you have opened the intended project.

Practice task: Open one project in **Projects record** and verify that it is the record you intended to review.

Module 2: Maintain project information during daily work

Goal: Use the project record responsibly when project information needs attention.

Lesson 2.1: Decide whether a project needs an update

During daily project work, you may learn information that should be reflected in the project record. Begin by opening the project through [Project List](#), then open the individual **Projects record**. Review the existing information before making any change so that you do not update the wrong record or replace information unnecessarily.

Practice task: Choose a project from [Project List](#) and review it in **Projects record** before deciding whether any update is needed.

Lesson 2.2: Update the correct project record

When you are authorized to maintain project information, work in the editable **Projects record**. Confirm the project first, make the required change in the record, and complete the record-editing process. If you only need to identify or select a project, return to [Project List](#) rather than treating the list as the place to maintain the record.

Practice task: In **Projects record**, make an authorized update to a practice or assigned project record.

Module 3: Review project records consistently

Goal: Apply a reliable record-review routine for ongoing and periodic project work.

Lesson 3.1: Perform a focused project review

For a routine check-in, start with [Project List](#) to identify the project to review. Open the corresponding **Projects record** and inspect the information recorded there. This two-step approach helps you keep the list-selection task separate from the detailed review task.

Practice task: Select a project in [Project List](#) and complete a focused review in **Projects record**.

Lesson 3.2: Confirm changes by revisiting the project

After an authorized update or review, confirm that you are still working with the intended project record. Return to [Project List](#) to identify the project again, then reopen it in **Projects record** to review the current record information. This helps make record maintenance more deliberate and repeatable.

Practice task: Reopen a project you previously reviewed from [Project List](#) and confirm its details in **Projects record**.

Final assessment

1. You have been asked to review a specific project but are currently looking at multiple project records. Which screen should you use first, and what should you do next?
2. You opened a project record and need to determine whether it is the correct project before making any changes. Which screen should you use to review the project's details?
3. You identify information that needs to be changed on a project, and you have edit permission. What is the appropriate sequence of screens to use?
4. A colleague asks you to confirm a project's recorded information but does not ask you to change anything. How should you complete the task while avoiding unnecessary edits?
5. After updating a project record, you want to confirm that you maintained the intended project. What repeatable review process should you follow?

Answers

1. Use [Project List](#) first to locate and select the project, then open **Projects record** to review it.

Why: The list view supports choosing the correct project before reviewing its individual record.

2. Use **Projects record**.

Why: The individual record is where you review the information for the selected project.

3. Locate the project in [Project List](#), open it in **Projects record**, review it, and then make the authorized update.

Why: Confirming the record before editing helps ensure the change is made to the intended project.

4. Locate the project in [Project List](#), then review it in **Projects record** without making changes.

Why: A review task requires examination of the individual record, not an unnecessary update.

5. Return to [Project List](#), identify the project again, and reopen it in **Projects record** to review the current information.

Why: Revisiting the selected record provides a consistent way to confirm your work.