

Microsoft®

Project 2010 Training

Project Quick Reference Card

Project 2010 Screen



Common Views

To Display a View: Select **View** from the menu bar and select a view from the menu, or select a view from the View Bar.

Calendar: Displays tasks and durations in a monthly calendar.

Gantt Chart: Default view. Displays a list of tasks with bar chart information.

Network Diagram: Displays a sequence or logic diagram that shows the project's tasks and dependencies.

Task Usage: Displays a list of tasks showing assigned resources under each task.

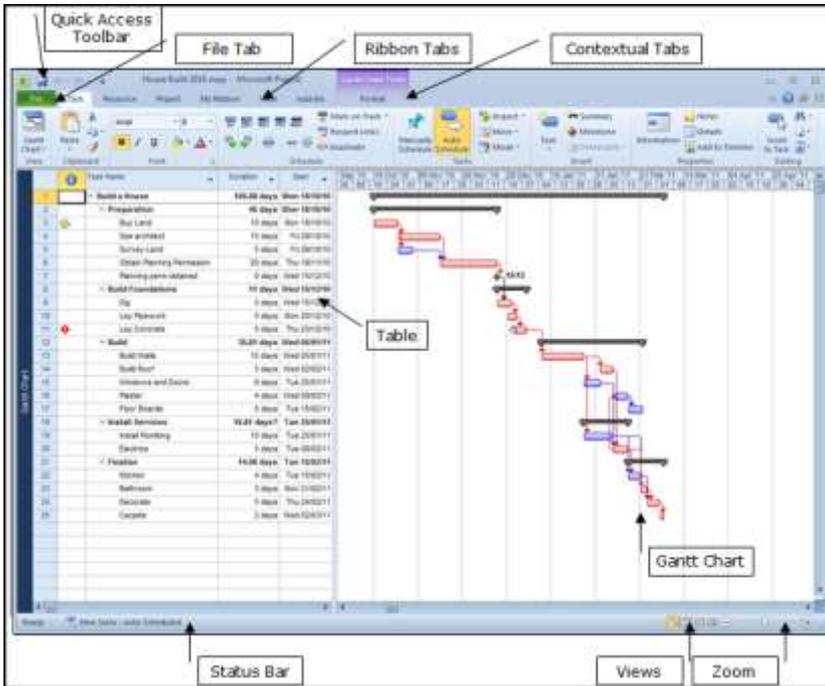
Tracking Gantt: Displays a list of tasks with a baseline schedule and Gantt bars.

Resource Graph: Displays a graph of resources and their costs, etc. over time.

Resource Sheet: Displays a list of resources and their details in rows and columns.

Resource Usage: Displays assigned tasks grouped under each resource.

More Views: Choose from a list of more advanced and specific views.



The Fundamentals

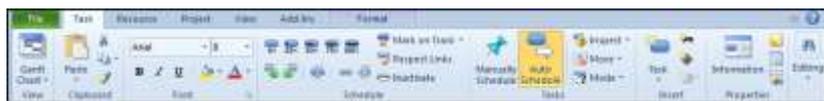
- **To Create a New Project:** Click the **New** button from the **File** Tab and then **create**, or press **<Ctrl> + <N>**.
- **To Use a Template:** Select **File** → **New** from the ribbon, select a template from the pane and click **create**
- **To View Information About the Project:** Select **Project** → **Project Information** from the Ribbon.
- **Set the Working Time Calendar:** Select **Project tab** → **Change Working Time** from the ribbon. Select the date(s) you want to change and select a new calendar, or enter the new working hours in the **Default:** and **exceptions:** boxes.
- **To Use Spelling, Undo and Redo:** Click the **Spelling** button (**project** tab), **Undo** button and **Redo** button are on the Quick Access Toolbar.
- **To view the Timeline:** Select **view tab** and tick the timeline checkbox.
- **To Adjust the Timescale:** Right click the timescale on the Gantt chart and choose **timescale..** Change the options in the Timescale dialog box, or select **View** tab, **Zoom** group and select the time scale you want to view.
- **To Save a Project File:** Click the **Save** button from the Quick Access Toolbar, or select **File -> Save** from the Ribbon, or press **<Ctrl> + <S>**.
- **To Save a Baseline Plan:** Select **Project** tab, **schedule** group, **set Baseline** button, from the menu. Click the **set Baseline** option, save the plan for the entire project or selected tasks, click **OK**.
- **To Save an Interim Plan:** Select **Project** tab, **schedule** group, **set Baseline** button, from the menu. Click the **set Baseline** option. Click the **Save Interim plan** option, name the plan, save the plan for the entire project or selected tasks, and click **OK**.
- **To View a Task's Chart bar:** Select the task and click the **Selected Tasks** button on the **View** ribbon, **Zoom** group.
- **To Get Help:** Press **<F1>** to open the Project Help task pane, type your question, and click the **Search** button.

Keystroke Shortcuts

Task or Resource Information	<Shift> + <F2>
Assign Resources	<Alt> + <F10>
Copy	<Ctrl> + <C>
Cut	<Ctrl> + <X>
Paste	<Ctrl> + <V>
Help	<F1>
View Context Sensitive Help	<Shift> + <F1>
Go To Selected Task	<Ctrl> + <Shift> + <F5>
Link Selected Task	<Ctrl> + <F2>
Unlink Selected Task	<Ctrl> + <Shift> + <F2>
Create a Hyperlink	<Ctrl> + <K>
Zoom In	<Ctrl> + </>
Zoom Out	<Ctrl> + <Shift>
+ < * >	
Undo/Redo	<Ctrl> + <Z>
Bold	<Ctrl> +
Italics	<Ctrl> + <I>
Underline	<Ctrl> + <U>

Plan and Manage the Project

- There are six basic steps to follow when planning a project: (1) Define a project (2) Plan project activities (3) Plan for and gather resources (4) Plan project costs (5) Plan for quality and risks (6) Plan security and communication.
- Project management is the process of planning, organizing, and managing tasks and resources to accomplish an objective within constraints of time, resources, or cost.
- Adjusting one constraint of the Project Triangle affects



the other two.

Working with Tasks

Task Ribbon

- **To Enter a Task:** Type the task's name in the **Task Name** column and press **<Enter>**.
- **To Enter a Duration:** Type the duration (m = minutes; h = hours; d = days; w = weeks; mo = months) in the Duration column and press **<Enter>**.
- **To Create a Milestone:** Enter 0 (zero) in the Duration column. Or, click the **Task Information** button and select the **Advanced** tab, click the **Mark task as Milestone** check box and click **OK**.
- **To Create a Recurring Task:** Select the task ribbon **Insert group**, drop down arrow under task to open menu and **Recurring Task**, enter information into the Recurring Task Information dialog box, and click **OK**.
- **To Access Task Information:** Select the task and click the **Information** button on the **Task** Ribbon. Or, press **<Ctrl> + <F2>**
- **To Organize the Task List:** Create summary tasks and subtasks by selecting the task(s) and clicking the **Outdent** or **Indent** button on the **Task** ribbon, **Schedule** group.
- **To Link Tasks:** Press **<Ctrl>** and select the two tasks you want to link in the order that you want to link them and click the **Link Tasks** button.
- **To Unlink Tasks:** Press **<Ctrl>** and select two linked tasks in the order they are linked. Click the **Unlink Tasks** button.
- **To Split a Task:** Select the task, click the **Split** button, and use the dividing tool to split the task's Gantt bar.
- **To Enter Lag or Lead Time:** Click the successor task, and click the **Task Information** button. Click the **Predecessors** tab and enter a lead time with a (-) minus sign, or lag time with a (+) plus sign in the **Lag** box.
- **To Enter a Task Deadline or Constraint:** Click the task to which you want to add a deadline and click the **Task Information** button. Click the **Advanced** tab, and enter a deadline into the Deadline box, or choose the constraint you want to use, and enter the Constraint date.
- **To Assign a Task Calendar:** Select the task, click the **Task Information** button and click the **Advanced** tab. Click the **Calendar** list arrow and select a calendar from the drop-down list.
- **To Apply a Filter:** Click the **Filter** list arrow on the **view** ribbon **data** group and select the filter you want to apply to the project.

Resources and Costs

- Change the ribbon to the resource tab to use the tools for resources Enter and work with resources just as you would with tasks.
- **To Enter Resource Availability:** Click the **Resource Information** button on the **resource** tab. Enter the Available To and Available From dates in the Resource Availability table, and enter the Maximum Units available in the Units field.
- **To Assign a Resource:** Select a task and click the **Assign Resources** button, select the resource(s) and click **Assign**.
- **To Enter Costs:** In a resource view, enter amounts in the **Std. Rate** field, the **Ovt. Rate** field, or the **Cost/Use** field. Then choose when you'd like to begin accruing the resource cost in the **Accrue At** field.
- **To Enter Fixed Costs:** Select **View** → **Gantt Chart** from the menu and select **Table** → **Cost** from the **data** group on the **view** tab. Select the task for which you want to enter a fixed cost and type the cost in the Fixed Cost field.

Viewing the Project

- **Applying a Split View:** Select the **details** checkbox from the **view** tab and select the view you want to display in the bottom pane from the drop down box to the right of the checkbox
- **Applying Groups:** Select the **view** tab, choose the **grouping** option from the **data** group, and choose an option from the menu.
- **Applying Filters:** Select the **view** tab, choose the **Filter** option from the **data** group, and then choose the filter type you want to use.
- **Applying Tables:** Select the **View** tab, choose **Table** from the drop down menu, and select the table you want to view.
- **Sort the Information:** Select the **View** tab, choose **sort** from the drop down menu, and then choose a sorting option.
- **View the Critical Path:** Select **View** → **More Views**, select **Detail Gantt** from the dialog box and click **Apply**.

Balancing the Project

- **To Identify an Overallocated Resource:** Open **Resource Usage** view and select **View, Filtered For** → **Overallocated Resources** from the menu.
- **To Balance Overallocated Resources Automatically:** Select a levelling option from the resource tab. Click the **Automatic** bullet and the **Level Entire Project** bullet, then click the **Level Now** button. click **OK**.
- **To Reassign Work:** Open **Gantt Chart** view, select the overallocated resource and click the **Assign Resources** button. Select the overallocated resource, click the **Remove** button, select another resource and click **Assign**.