Microsoft®
Project 2010
Quick Reference Card

Project 2010 Screen

Quick Access Toolbar · Minimize Ribbon · File tab · Ribbon · Timeline · Vertical Scroll Bar · Gantt chart · Pane divider · Status Bar · Gantt spreadsheet · Gantt chart · Horizontal Scroll Bar · View buttons · Zoom slider
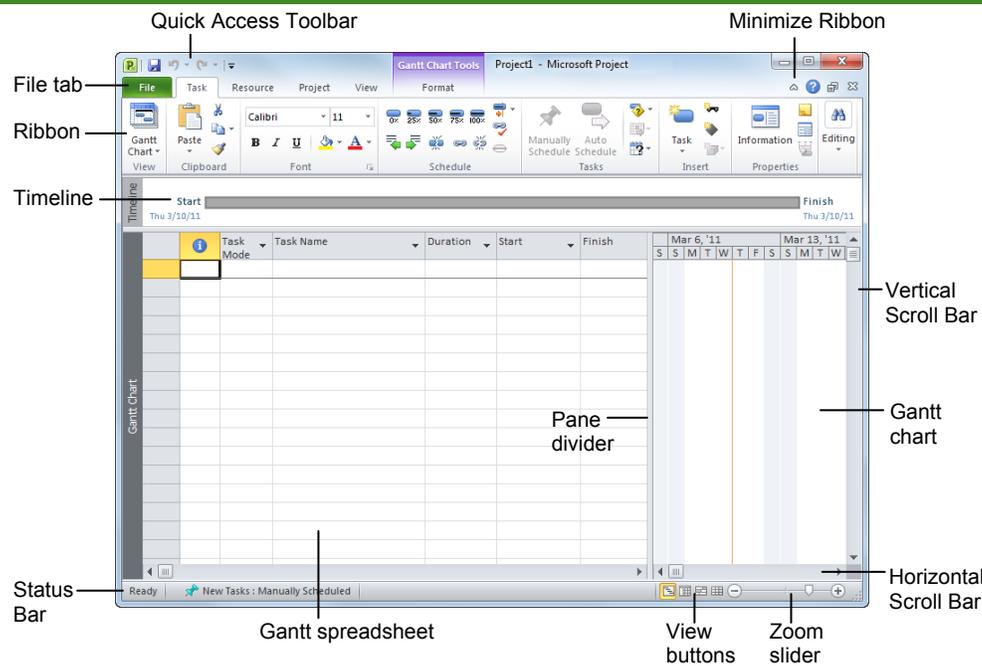
Common Views

To Display a View: Click the **View** tab on the Ribbon and select a view from the Task or Resource Views groups. Or, click a view button in the status bar of the program window. Or, click the **Task** tab or **Resource** tab on the Ribbon, click the button list arrow in the View group, and select a view.

Gantt Chart: This is the default task view. Displays a task list with bar chart information.

Calendar: Displays tasks and durations in a monthly calendar.

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

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

Resource Usage: Displays assigned tasks grouped under each resource.

Resource Form: Displays resource information in a form view.

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

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

Task Form: Displays task information in a form view.

Task Sheet: Displays a list of tasks and their details in rows and columns.

Team Planner: The default resource view. Choose from more advanced and specific views.

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

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

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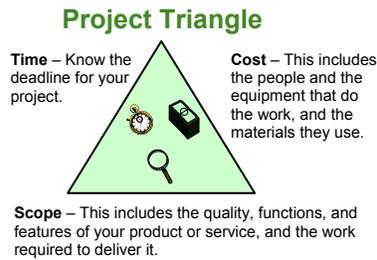
The Fundamentals

- **To Create a New Project:** Click the **File** tab on the Ribbon and select **New**.

- **To Create a Project from a Template:** Click the **File** tab on the Ribbon and select **New**. Select a template under the Office.com Templates section, or click **My Templates** and select a template.

- **To Create New Project from an Excel Spreadsheet or SharePoint List:** Click the **File** tab on the Ribbon and select **New from Excel workbook** or **New from SharePoint task list**.

- **To Save a Project File:** Click the **Save** button on the Quick Access Toolbar, click **File** tab on the Ribbon and select **Save**. Or, press **<Ctrl>** + **<S>**.

- **To View Information about a Project:** Click the **Project** tab on the Ribbon and click the **Project Information** button in the Properties group.

- **Set the Working Time Calendar:** Click the **Project** tab on the Ribbon and click the **Change Working Time** button in the Properties group. Select the date(s) you want to change and select a new calendar, or enter the new working hours in the **From:** and **To:** boxes.

- **To Update the Project:** Click the **Project** tab on the Ribbon and click the **Update Project** button in the Status group.

- **To Set the Status Date:** Click the **Project** tab on the Ribbon and click the **Status Date** button in the Status group. Select the status date to report progress of the project.

- **To Save a Baseline Plan:** Click the **Project** tab on the Ribbon and click the **Set Baseline** button in the Properties group. Select the **Set baseline** option, save the plan for the entire project or selected tasks, click **OK**.

- **To Save an Interim Plan:** Click the **Project** tab on the Ribbon and click the **Set Baseline** button in the Properties group. Select the **Set interim plan** option, save the plan for the entire project or selected tasks, click **OK**.

- **To Calculate Project Changes:** Click the **Project** tab on the Ribbon and click the **Calculate Project** button in the Schedule group.

- **To Open the Timescale Dialog Box:** Click the **View** tab on the Ribbon, click the **Timescale** list arrow in the Zoom group, and select **Timescale**. Or, double-click inside the timescale header.

- **To Adjust the Timescale:** Click the **View** tab on the Ribbon and click the **Timescale** list arrow in the Zoom group. Or, change the options in the Timescale dialog box.

- **To Adjust the Zoom Level:** Click and drag the **Zoom Slider** to zoom in or out. Or, click the **View** tab on the Ribbon and click the **Zoom** button in the Zoom group. Choose a zoom option from the list.

- **To Jump to a Tasks:** Select the task you wish to view. Click the **View** tab on the Ribbon and click the **Zoom Selected Tasks** button in the Zoom group.

- **To View the Entire Project:** Click the **View** tab on the Ribbon and click the **Zoom Entire Project** button in the Zoom group.

Keyboard Shortcuts

Task or Resource Information	**<Shift> + <F2>**
Assign Resources	**<Alt> + <F10>**
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>**
Zoom In	**<Ctrl>+ </>**
Zoom Out	**<Ctrl> + < * >**

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.

Project Triangle

Time – Know the deadline for your project.

Cost – This includes the people and the equipment that do the work, and the materials they use.

Scope – This includes the quality, functions, and features of your product or service, and the work required to deliver it.

Working with Tasks

- **To Enter a Task:** In a task view, type the task's name in the Task Name column and press **<Enter>**. Or, click the **Task** tab and click the **Insert Task** button in the Insert group. A new task is inserted above the selected task.
- **To Enter Blank Row:** Click the **Task** tab, click the **Insert Task** button list arrow in the Insert group and select **Blank Row**. A blank row is inserted above the selected task.
- **To Enter Task 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:** Click the **Task** tab on the Ribbon and click the **Insert Milestone** button in the Insert group. Or enter 0 (zero) in the Duration column.
- **To Create a Recurring Task:** Click the **Task** tab, click the **Insert Task** button list arrow in the Insert group, and select **Recurring Task**. Enter information into the Recurring Task Information dialog box and click **OK**.
- **To Access Task Information:** Select the task. Click the **Task Information** tab on the Ribbon and click the **Information** button in the Properties group.
- **To Organize the Task List:** Create summary tasks and subtasks by selecting the task(s) and clicking the **Outdent Task** or **Indent Task** button in the Schedule group of the Task tab on the Ribbon.
- **To Link Tasks:** Press **<Ctrl>**, select the two tasks you want to link in the order they should be linked, and click the **Link Tasks** button in the Schedule group of the Task tab on the Ribbon.
- **To Unlink Tasks:** Press **<Ctrl>** and select the linked tasks in the order they are linked. Click the **Unlink Tasks** button in the Schedule group of the Task tab on the Ribbon.
- **To Split a Task:** Select the task, click the **Split** button in the Schedule group of the Task tab, and use the dividing tool to split the task's Gantt bar.
- **To Change How Existing Tasks Are Scheduled:** Click the task's **Task Mode** list arrow and select **Auto Scheduled** or **Manually Scheduled**.
- **To Change How New Tasks Are Scheduled:** Click the status bar and select **Auto Scheduled** or **Manually Scheduled**.
- **To Enter Lag or Lead Time:** Click the successor task and click the **Information** button in the Properties group. 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 **Information** button in the Properties group. 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 Apply a Filter:** Click the column list arrow and select the filter you want to apply to the task list.

Working with Resources and Costs

- **To Add a Resource:** In a resource view, click the **Resource** tab on the Ribbon and click the **Add Resources** button in the Insert group. Select the type of resource you want to add and enter its information.
- **To Enter Resource Availability:** Click the **Information** button in the Properties group of 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. Click the **Resources** tab on the Ribbon and click the **Assign Resources** button in the Assignments group. Select the resource(s) and click **Assign**.
- **To Enter Costs:** In a resource view, enter cost 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:** Click the **View** tab on the Ribbon and click the **Tables** button in the Data group. Select **Cost** from the list. Select the task for which you want to enter a fixed cost and type the cost in the Fixed Cost field.

View Tools

- **Viewing the Timeline:** By default a timeline of the entire project appears above the selected view. To turn this on or off, click the **View** tab on the Ribbon and check or uncheck the **Timeline** check box in the Split View group.
- **Applying Groups:** Click the **View** tab on the Ribbon and click the **Group By** list arrow in the Data group. Select a group from the list.
- **Applying Filters:** Click the **View** tab on the Ribbon and click the **Filter** list arrow in the Data group. Select a filter from the list.
- **Applying Tables:** Click the **View** tab on the Ribbon and click the **Tables** button in the Data group. Select a table from the list.
- **Sort the Information:** Click the **View** tab on the Ribbon and click the **Sort** button in the Data group. Select a sorting option from the list.

Tracking Progress

- Always save a baseline plan before updating progress.
- **To Update Tasks:** Select the task you want to update. Click the **Task** tab on the Ribbon and click a **% Complete** button in the Schedule group.
- **To Mark Tasks On Track:** Select the tasks that you want to mark as on track. Click the **Task** tab on the Ribbon and click the **Mark on Track** button in the Schedule group.
- **To Update Resources:** In Resource Usage or Task Usage view, click the **View** tab on the Ribbon and click the **Tables** button in the Data group. Find the resource you want to update and update new actual work value.
- **To Check Project Variance:** Click the **View** tab on the Ribbon and click the **Tables** button in the Data group. Select **Variance** from the list.

Balancing the Project

- **To Identify an Overallocated Resource:** Open **Resource Usage** view and click the **Format** tab under Resource Usage Tools on the Ribbon. Click the **Overallocation** check box in the Details group. Or, click the **Resource** tab on the Ribbon and click the **Next Overallocation** button in the Level group.
- **To Balance the Project:** Click the **Resource** tab on the Ribbon and click the **Level All** button in the Level group.
- **To Balance Tasks for a Specific Resource:** Select a resource. Click the **Resource** tab on the Ribbon and click the **Level Resource** button in the Level group.
- **To Reassign Work:** Open **Team Planner** view. Click and drag a task from an overallocated resource to another resource.

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