Project
Cheat Sheet

CustomGuide
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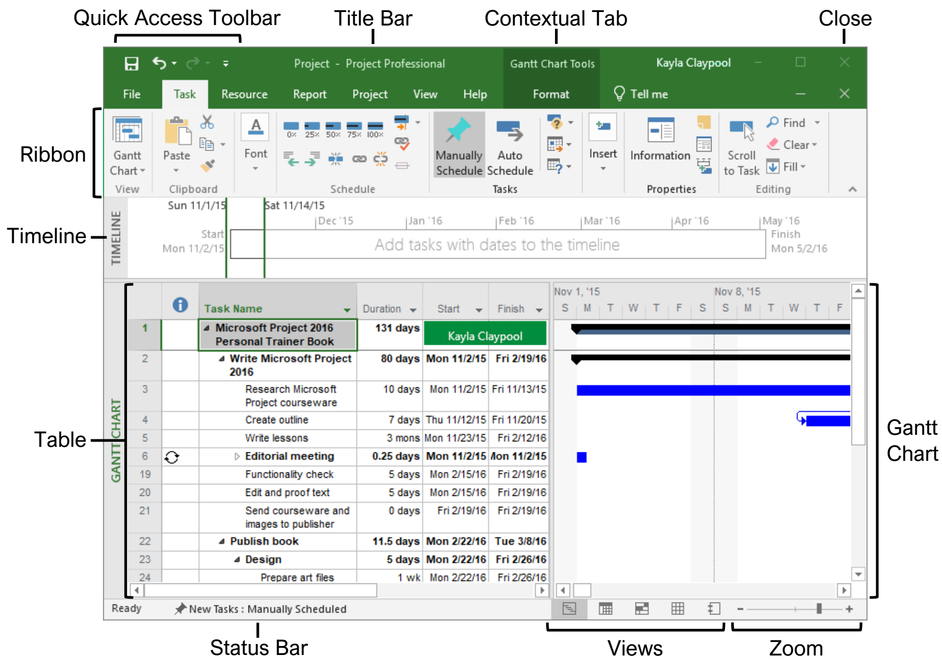
The Project 2016 Program Screen



Project Fundamentals

Create a New Project: Click the **File** tab, select **New**, and click **Blank Project**.

Open a File: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a File: Click the **File** tab and select **Save**, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Set Project Information: Click the **Project** tab on the ribbon and click the **Project Information** button. Choose to schedule the project from the start date or finish date, and select the start date or finish date. Click the **Calendar** list arrow and select an option, then click **OK**.

Create a New Project Calendar: Click the **Project** tab and click the **Change Working Time** button. Click the **Create New Calendar** button, type a name for the calendar, and click **OK**.

Change Work Days and Hours: Click the **Project** tab and click the **Change Working Time** button. Click the **Work Weeks** tab, click the **Details** button, and select a day to modify the work hours. Click **OK** twice to close the dialog boxes.

Project Views

Change Views: Click the **View** tab and select a view, or click one of the view buttons at the bottom of the window.

Gantt Chart	Displays the task sheet on the left and graphical bars on the right.
Task Usage	Displays all tasks and the resources assigned to them.
Calendar	Displays the project tasks in a calendar view.
Team Planner	Displays resources' work over time.
Resource Sheet	Displays a list of resources and their details.

Turn on the Timeline: Click the **View** tab on the ribbon and select the **Timeline** check box.

Sort Information: Click the **View** tab on the ribbon, click the **Sort** button, and select a sort option.

Filter Information: Click the **View** tab on the ribbon, click the **Filter** list arrow, and select a filter option.

Keyboard Shortcuts

General

Open an existing project	**Ctrl** + **O**
Create a new project	**Ctrl** + **N**
Save a project	**Ctrl** + **S**
Print a project	**Ctrl** + **P**
Close a file	**Ctrl** + **W**
Close Project	**Alt** + **F4**
Help	**F1**
Spell check	**F7**
Zoom in	**Ctrl** + **/**
Zoom out	**Ctrl** + **Shift** + *****

Navigation and Views

Up one screen	**Page Up**
Down one screen	**Page Down**
Show filtered tasks or resources	**F3**
Display Field Settings	**Alt** + **F3**
Show task or resource information	**Shift** + **F2**
Hide subtasks	**Alt** + **Shift** + **-**
Show all tasks	**Alt** + **Shift** + *****

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Create a hyperlink	**Ctrl** + **K**
Add a new task	**Insert**
Cancel an entry	**Esc**
Clear/reset field	**Ctrl** + **Delete**
Fill down	**Ctrl** + **D**
Link tasks	**Ctrl** + **F2**
Unlink tasks	**Ctrl** + **Shift** + **F2**
Set task to manually schedule	**Ctrl** + **Shift** + **M**
Set task to auto schedule	**Ctrl** + **Shift** + **A**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**

Tasks

Scheduling Tasks: Tasks in Project can be manually or auto scheduled.

- **Manually Scheduled Tasks (the default):** Can be placed anywhere in the schedule and Project won't move them. You can add just the details you know and come back later to fill in additional details.
- **Auto Scheduled Tasks:** Are scheduled by Project. You enter information such as the task duration, work, resources, and constraints, and Project calculates when the task should start.

Set the Task Scheduling Mode: Click the **New Tasks** button in the status bar and select a scheduling method.

Insert a Task: In Gantt Chart view, click where you want to add the new task and click the **Task** button on the Task tab. Type a name for the task and press **Enter**.

Delete a Task: Click the **Task ID** for the task you want to delete and press the **Delete** key on the keyboard.

Create a Milestone Task: Click in a blank **Task Name** cell, type a name for the milestone and press **Enter**. Click the milestone's **Duration** cell, type **0 D**, and press **Enter**. Milestones are just like regular tasks, but with no duration. They are represented with the ◆ symbol.

Link Tasks: Select the task(s) you want to link and click the **Link** button on the Task tab.

Create a Summary Task: Select the tasks that will be part of the summary task, click the **Task** tab on the ribbon, and click the **Insert Summary Task** button. Type a name for the summary task and press **Enter**.

Edit Task Information: Select the task you want to edit and click the **Information** button on the Task tab. Make the necessary updates and click **OK**.

Add Lag or Lead Time: Select the task you want to add lag or lead time to and click the **Information** button on the Task tab. Click the **Predecessors** tab, click in the **Lag** field, and type a negative number or percentage to add lead time and a positive number or percentage to add lag time. Click **OK**.

Add a Constraint: Double-click the task you want to add a constraint to and click the **Advanced** tab in the Task Information dialog box. Select a constraint type and date, then click **OK**.

Split Tasks: Select the task you want to split and click the **Split Task** button on the Task tab. Place the splitting cursor on the date you want the split to begin in the Gantt chart, then click and drag to the date you want the task to resume.

Resources

There are 3 types of resources in Project:

Work Resource	Resources that you assign by time, like a person who works full time. Their cost is based on time worked.
Material Resource	Physical items used in completing the project, like a computer. Their cost is not based on time.
Cost Resource	Resources that aren't based on time or quantity, such as travel expenses or fees.

View the Resource Sheet: Click the **View** tab on the ribbon and click the **Resource Sheet** button.

Add Work Resources: Click in the first blank **Resource Name** field, type a resource name, and press **Enter**. Ensure **Work** is selected in the Type column and add in any known resource information.

Add Material Resources: Click in the first available cell in the **Resource Name** field, type a resource name, and press **Enter**. Click the **Type** field's list arrow and select **Material**. Add any known resource information.

Add Cost Resources: Click in the first available cell in the **Resource Name** field, type a resource name, and press **Enter**. Click the **Type** field's list arrow and select **Cost**. Add any known resource information.

Assign Resources to Tasks: Open the Task Information dialog box for the task you want to assign a resource to. Click the **Resources** tab and then click the list arrow in the first blank **Resource Name** field. Select the resource you want to assign to the task. Add any known resource information and click **OK**.

Delay a Resource Start Date: In Task Usage view, select the resource you want to delay. Click the **Format** tab and click the **Information** button. Then, click the **Start** list arrow, select a delayed start date for the resource, and click **OK**.

Manage Projects

Enter Fixed Costs: In Gantt Chart view, click the **View** tab, click the **Tables** button, and select **Cost**. Click in the Fixed Cost cell for the desired task, enter a fixed cost, and press **Enter**.

Add General Resource Rates: Select the resource you want to modify in Resource Sheet view. Click the **Resource** tab, click the **Information** button, and click the **Costs** tab. Enter the standard rate, overtime rate, or per use cost on the A tab. Additional rates can be added on the B, C, etc. tab. Click **OK**.

Save a Baseline: Click the **Project** tab on the ribbon, click the **Set Baseline** button, and select **Set Baseline**. Select **Entire project** or **Selected tasks** and click **OK**.

Update Actual Task Values: Select the task you want to update, click the **Mark on Track** list arrow on the Task tab and select **Update Tasks**. Fill in any actual task values and click **OK**.

Update Task Completion: Select the task that needs the completion percentage updated. Click a **Completion Percentage** button in the Schedule group of the Task tab on the ribbon.

View Project Statistics: Click the **Project** tab, click the **Project Information** button, and click **Statistics**.

View Project Variance: In Task Sheet view, click the **View** tab, click the **Tables** button, and select the item you want to see variance for (e.g. cost or duration). The Variance column displays the difference between the baseline values and actual values entered for the project.

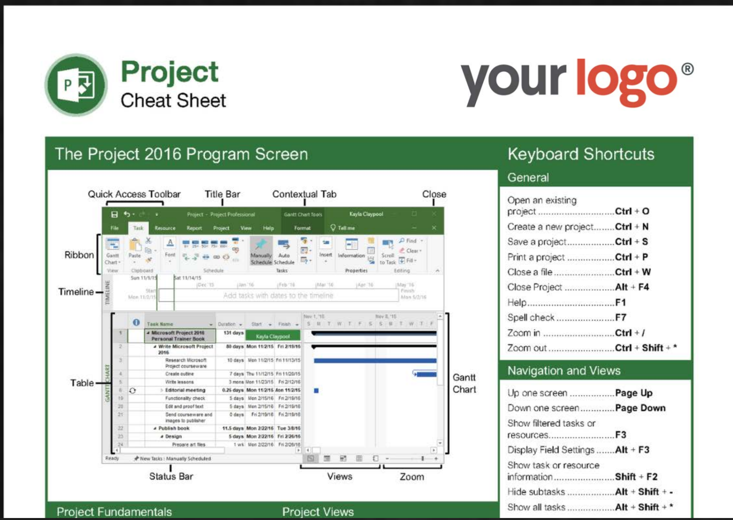
Reports

Create a Report: Project reports provide a graphical snapshot of project information. There are 4 main report types, which you'll find on the Report tab.

Dashboard Report	Make better decisions by viewing eye-catching, dynamic reports based on your project's data.
Resource Report	Better manage your team's work by analyzing reports around the project's resource data.
Cost Report	Keep control of your project's costs by analyzing reports around cost data.
In Progress Report	Analyze how your project is going up to this point.

Edit a Report: Select an item in the report to edit and make the necessary edits in the Field List pane or the Tools contextual tabs of the ribbon.

Export a Report: Create and edit the report you wish to export, then click the **File** tab, and select **Save As**. Select a location to save the file and type a file name. Then, click the **Save As** list arrow, select the file format you want to save to, complete the Export Wizard with the necessary options, and click **Finish**.



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