

Project cheat Sheet



Starting Your Project

- Change any default settings in the File > Options
- Set your calendars—includes bank holidays and any custom calendars required
- Set your Start or Finish Date using Project Information or Move Project
- Set your Project Properties and Headers and Footers

Adding Tasks to your Plan

- Plan out tasks and phases - change task types if necessary
- Plan your dependencies and link tasks as required
- Set constraints, deadlines and lag / lead times as needed
- Create and assign resources and costs (Optional)
- Resolve overallocations
- Set Baselines

Maintaining Your Plan

Task Ribbon

- Use the 0—100% options available
- Use Move Task to reschedule incomplete work
- Use Mark on Track to update accurately against today's date or against a projected date (using Status Date on the Project Ribbon)
- Use Update Task to enter Actual Start and Finish Dates

Columns

- Add the % Complete column and manually enter your progress
- Add the Actual Start and Actual Finish Date columns to manually update tasks that have started or finished early or late

Project Ribbon

- Use Update Project to reschedule incomplete work or update your project or selected tasks up to today's date or a projected date (using Status Date)

Useful Keyboard Shortcuts

File Management

New File	Ctrl + N
Save	Ctrl + S
Save As	F12
Open	Ctrl + F12
Print	Ctrl + P
Close Project	Ctrl + W
Navigate between open Projects	Ctrl + F6

Navigating Views

Remove filters	F3
Remove Sort / Group	Shift + F3
Open in New Window	Shift + F11
Task / Resource Info	Shift + F2
Zoom In	Ctrl + /
Zoom Out	Ctrl + *

Changing Your Views

Gantt Chart - Default View – Contains the Entry Table and the Gantt Chart

Entry Table - This is the default table and used for task entry

Task Usage - This view allows you to view and edit the daily breakdown of the hours worked per task per resource.

Team Planner (Professional Only) - Allows you to view how your resources have been allocated in a calendar format

Calendar - Allows you to view your tasks in a calendar format

Resource Usage - This view allows you to view and edit the daily breakdown of the hours worked per resource per task.





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