Quick Reference

Microsoft Project 2010

Module 2

47 Greenaway Street
Bulleen Victoria 3105
Australia
www.watsoniapublishing.com
info@watsoniapublishing.com

WATSONIA PUBLISHING

Generated using EngineRoom™ Profiler on 14/11/2011

Table of Contents

Project Views ... 2
Tables ... 3
Controlling Project Data ... 4
Formatting Projects ... 5
Gantt Chart Printing ... 7
Predefined Reports ... 8
Templates ... 9
Microsoft Project Files ... 11
Linking and Combining Projects ... 11
Shared Resources ... 13
Downsizing Larger Projects ... 14
Other Applications ... 15
Microsoft Project VBA ... 16

Quick Reference

Quick Reference

Project Views

To display the standard, built-in views:

1. Click on the ***View*** tab on the ***Ribbon***
2. Click on ***Other Views*** and click on ***More Views***
3. Scroll to and click on the desired view then click on **[Apply]**

To display a split screen:

1. Click in the ***Details*** tick box in the ***Split View*** group on the ***View*** tab
2. Click on the drop arrow to choose the desired view for the lower pane

To create a custom view:

1. Click on the ***View*** tab, click on ***Other Views*** and click on ***More Views***
2. Click on **[New]**, click on ***Single View*** and click on **[OK]**
3. Enter the appropriate settings

To create a custom split view:

1. Click on the ***View*** tab, click on ***Other Views*** and click on ***More Views***
2. Click on **[New]**, click on ***Combination View*** and click on **[OK]**
3. Enter the appropriate settings

To display a custom view:

1. Click on an appropriate resource or task view on the ***View*** tab that will display a menu of views
2. Click on the desired custom view

To put views on a menu:

1. Click on the view in the ***More Views*** dialog box and click on **[Edit]**
2. Tick the ***Show in menu*** setting to see the view on the menu
3. Click on **[OK]**

To save an existing view:

1. Define the screen elements in the way you wish
2. Click on the ***Gantt Chart*** drop arrow and click on ***Save View***
3. Type a name for the view and click on **[OK]**

To delete a view:

1. Click on the ***View*** tab, click on ***Other Views***, click on ***More Views***, then click on **[Organiser]**
2. Click on the name of the view and click on **[Delete]**

To keep views local:

1. Click on the ***File*** tab on the ***Ribbon*** and click on ***Options***
2. Click on the ***Advanced*** tab
3. Un-tick ***Automatically add new views, tables, filters, and groups to the global***

Tables

To display a table in a project:

1. Click on the ***View*** tab, and click on ***Tables*** in the ***Data*** group
2. Click on the desired table

To create a new table from scratch:

1. Click on the ***View*** tab, click on ***Tables*** in the ***Data*** group, and click on ***More Tables***
2. Click on ***Task*** or ***Resource*** then click on **[New]**

To add more fields to a table:

1. Click on the drop arrow for ***Add New Column***
2. Scroll to and click on the desired field

To format table fields:

1. Click on the ***View*** tab, click on ***Tables*** in the ***Data*** group, and click on ***More Tables***
2. Click on table and click on **[Edit]**
3. Change the ***width***, ***alignment***, ***title*** values as appropriate

To use a custom table:

1. Display the custom table on the screen
2. Enter the data into the fields as you would a built-in table.

To use a hyperlink field:

1. Type a link (e.g. web address, email address, file name) into a hyperlink cell
2. Click on the hyperlink.

Quick Reference

Controlling Project Data

To use a highlight filter:

1. Click on the ***View*** tab and click on the ***Highlight*** drop arrow in the ***Data*** group
2. Click on the desired highlight filter

To apply a date range highlight filter:

1. Click on the ***Highlight*** drop arrow in the ***Data*** group and click on ***Date Range***
2. Type a date in the first box and click on **[OK]**
3. Type a date in the second box and click on **[OK]**

To highlight a range of tasks:

1. Click on the ***View*** tab, click on the ***Highlight*** drop arrow, and click on ***Task Range***
2. Type a task ***ID*** number in the top cell and another in the second
3. Click on **[OK]**

To highlight specific resources used in tasks:

1. Click on the ***View*** tab, click on the ***Highlight*** drop arrow, and click on ***Using Resource***
2. Click on the resource drop arrow and click on the desired resource
3. Click on **[OK]**

To see more filters:

1. Click on the ***View*** tab on the ***Ribbon***, click on the ***Highlight*** drop arrow in the ***Data*** group
2. Click on ***More Highlight Filters***

To display a filter:

1. Click on the ***View*** tab on the ***Ribbon***, and click on the ***Filter*** drop arrow
2. Click on the desired filter

To create a custom filter:

1. Click on the ***View*** tab, click on the ***Filter*** drop arrow, and click on ***New Filter***
2. Specify a name for the filter then a field, a test, and a value
3. Click on **[Save]**

Quick Reference

To use a custom filter:

1. Click on the ***View*** tab, Click on the ***Highlight*** drop arrow and click on ***More Highlight Filters***
2. Click on the desired filter and click on either **[Apply]** or **[Highlight]**

To edit an existing filter definition:

1. Click on the ***View*** tab, click on the ***Filter*** drop arrow and click on ***More Filters***
2. Click on the desired filter and click on **[Edit]**

To delete an unwanted filter:

1. Click on the ***View*** tab, click on the ***Filter*** drop arrow and click on ***More Filters***
2. Click on **[Organiser]**
3. Click on the filter to delete, click on **[Delete],** then click on **[Yes]**

To group tasks in a project:

1. Click on the ***View*** tab on the ***Ribbon***
2. Click on the ***Group by*** drop arrow and click on the desired grouping

To use autofilters:

1. Click on the ***View*** tab, click on the ***Filter*** drop arrow in the ***Data Group*** and click on ***Display Autofilter***
2. Click on the filter drop arrow next to a column heading

Formatting Projects

To change time periods on the timescale:

1. Click on the ***View*** tab and click on the ***Timescale*** drop arrow
2. Click on the desired time period

To see more tiers on the timescale:

1. Click on the ***View*** tab, click on the ***Timescale*** drop arrow and click on ***Timescale***
2. Click on the drop arrow for ***Show*** in ***Timescale*** and click on the desired option

Quick Reference

To modify specific tiers:

1. Click on the ***View*** tab, click on the ***Timescale*** drop arrow and click on ***Timescale***
2. Click on the tier to change and make the appropriate adjustments

To format non-working time:

1. Click on the ***View*** tab, click on the ***Timescale*** drop arrow and click on ***Timescale***
2. Click on the ***Non-working time*** tab and adjust the settings as appropriate

To change the text styles in a project:

1. Click on the ***Format (Gantt Chart Tools)*** tab and click on ***Text Styles***
2. Choose the ***Item to Change*** and apply the desired formatting

To display gridlines:

1. Click on the ***Format (Gantt Chart Tools)*** tab and click on ***Gridlines***
2. Select the ***Line to change***
3. Adjust the line and colour settings as desired

To display progress lines in a project:

1. Click on the ***Format (Gantt Chart Tools)*** tab click on ***Gridlines*** in the ***Format*** group, and click on ***Progress Lines***
2. Enter the period details as desired

To format progress lines in a project:

1. Click on the ***Format (Gantt Chart Tools)*** tab, click on ***Gridlines***, and click on ***Progress Lines***
2. Click on the ***Line Styles*** tab
3. Change the settings as desired

To change the Gantt Chart layout:

1. Click on the ***Format (Gantt Chart Tools)*** tab, and click on ***Layout***
2. Change the settings as desired

To change Gantt Chart Styles:

1. Click on the ***Format (Gantt Chart Tools)*** tab
2. Click on the desired style

To change the text shown on a Gantt Chart bar:

1. Select the task(s) to change
2. Click on the ***Format (Gantt Chart Tools)*** tab, click on ***Format*** and click on ***Bar***
3. Click on the ***Bar Text*** tab and change the settings as desired

To format specific bars on a Gantt Chart:

1. Select the tasks to change
2. Click on the ***Format (Gantt Chart Tools)*** tab, click on ***Format*** and click on ***Bar***
3. Click on the ***Bar Shape*** tab and change the settings as desired

To change bar styles in a project:

1. Click on the ***Format (Gantt Chart Tools)*** tab, click on ***Format*** and click on ***Bar Styles***
2. Click on the bar type to change
3. Choose the settings as desired

Gantt Chart Printing

To display more commands on the Ribbon:

1. Right click on a ***Ribbon*** tab and click on ***Customise the Ribbon***
2. Click on **[New Group]** to create a new group
3. Use the ***Choose commands from*** list to **[Add]** new commands to the group

To display a Gantt chart in preview mode:

1. Click on the ***File*** tab on the ***Ribbon***
2. Click on ***Print*** to see the preview

To insert a page break:

1. Click on the task that is to appear on the next page
2. Click on the ***Project*** tab on the ***Ribbon*** and click on ***Insert Page Break*** in the ***(Custom) Printing*** group

To print within dates:

1. Click on the ***File*** tab and click on ***Print***
2. Click on ***Print Entire Report*** in ***Settings*** and click on ***Print Custom Dates and Pages***
3. Specify the dates in the date fields

Quick Reference

To insert a header into a report:

1. Click on the ***File*** tab, click on ***Print***, click on ***Page Setup*** and click on the ***Header*** tab
2. Enter the header settings as desired

To insert a footer into a report:

1. Click on the ***File*** tab, click on ***Print***, click on ***Page Setup*** and click on the ***Footer*** tab
2. Enter the footer settings as desired

To work with legends:

1. Click on the ***File*** tab, click on ***Print***, click on ***Page Setup*** and click on the ***Legend*** tab
2. Enter the settings as desired

To fit a report to pages:

1. Click on the ***File*** tab, click on ***Print***, click on ***Page Setup*** and click on the ***Page*** tab
2. Enter the settings as desired

To print to a PDF file:

1. Click on the ***File*** tab and click on ***Save & Send***
2. Click on ***[Create PDF/XPS]***
3. Specify a file name and location and click on **[OK]**

Predefined Reports

To use a predefined report:

1. Click on the ***Project*** tab and click on ***Reports***
2. Click on a category and click on **[Select]**
3. Click on a report and click on **[Select]**

To use report lists:

1. Click on the ***Project*** tab and click on ***Reports***
2. Click on ***Custom*** and click on **[Select]**
3. Click on a report and click on **[Select]**

Quick Reference

To modify a predefined report:

1. Click on the ***Project*** tab, click on ***Reports***, click on ***Custom*** and click on **[Select]**
2. Click on the report to edit and click on **[Edit]**
3. Modify the settings as appropriate

To run a crosstabulation report:

1. Click on the ***Project*** tab, click on ***Reports***, click on ***Custom*** and click on **[Select]**
2. Click on the desired report and click on **[Select]**

To dissect a crosstabulation report:

1. Click on the ***Project*** tab, click on ***Reports***, click on ***Custom*** and click on **[Select]**
2. Click on the desired report and click on **[Edit]**

To create a custom report:

1. Click on the ***Project*** tab, click on ***Reports***, click on ***Custom*** and click on **[Select]**
2. Click on **[New]**
3. Click on the type of report and click on **[OK]**

To adjust the details of a custom report:

1. Ensure the custom report dialog box appears on the screen
2. Adjust the settings as desired in the ***Details*** and ***Sort*** tabs on the dialog box

To share custom reports:

1. Click on the ***Project*** tab, click on ***Reports***, click on ***Custom*** and click on **[Select]**
2. Click on **[Organiser]**
3. Use the tools in the ***Organiser*** to copy the report from one file to another

Templates

To see the available templates:

1. Click on the ***File*** tab on the ***Ribbon*** to access the ***Backstage***
2. Click on ***New***

Quick Reference

To save a project as a template:

1. Click on the ***File*** tab and click on ***Save As***
2. Type a new name in ***File name***
3. Change the ***Save as type*** to ***Project Template*** and click on **[Save]**

To create a new project from a custom template:

1. Click on the ***File*** tab and click on ***New***
2. Click on ***My Templates***
3. Click on the desired template and click on **[OK]**

To create a template shortcut:

1. Drag a copy of a template file from a ***Windows Explorer*** window to the ***My Templates*** dialog box

To manage My templates:

1. Click on the ***File*** tab, click on ***New*** and click on ***My templates***
2. Right click on any template and use the options on the shortcut menu to manage the templates

To open a template for modification:

1. Use the ***Open*** command on the ***File*** tab to open the template file
2. Make the appropriate changes
3. Save the project file back as a template

To move elements to the Global template:

1. Click on the ***View*** tab, click on ***Tables*** and click on ***More Tables***
2. Click on **[Organiser]**
3. Use the buttons on the ***Organiser*** to copy, rename or delete elements

To apply a table from the Global template:

1. Click on the ***View*** tab
2. Click on ***Tables*** in the ***Data Group*** and click on ***More Tables***
3. Click on the desired table and click on **[Apply]**

To remove a table from the Global template:

1. Click on the ***View*** tab, click on ***Tables***, click on ***More Tables***, and click on **[Organiser]**
2. Click on the table to delete on the ***Global*** side
3. Click on **[Delete]**

Quick Reference

Microsoft Project Files

To open a previous version project file:

1. Click on the ***File*** tab and click on ***Open***
2. Locate and click on the file and click on **[Open]**

To move a project start date:

1. Click on the ***Project*** tab, and click on ***Move Project*** in the ***Schedule*** group
2. Set the appropriate date and click on **[OK]**

To switch between open project files:

1. Click on the ***View*** tab and click on ***Switch Windows*** in the ***Window*** group
2. Click on the desired project

To add Save Workspace to the QAT:

1. Right click on the ***Quick Access Toolbar*** and click on ***Customise Quick Access Toolbar***
2. Add ***Save Workspace*** from ***Commands Not in the Ribbon***

To create a workspace file:

1. Open only those files you want included in the workspace
2. Access the ***Save Workspace*** command, type a file name and click on **[Save]**

To use a workspace:

1. Click on the ***File*** tab and click on the ***Open*** command
2. Click on the drop arrow for ***Microsoft Project Files*** and click on ***Workspaces (*.mpw)*** and open the desired file

To hide a project file:

1. Open the file and view it on the screen
2. Click on the ***View*** tab, click on ***Hide*** in the ***Window*** group, then click on ***Hide***

Linking and Combining Projects

To combine projects into a master project:

1. Open the files to be combined
2. Click on the ***View*** tab and click on ***New Window*** in the ***Window*** group
3. Select the file to combine and click on **[OK]**

Quick Reference

To view more or less of inserted projects:

1. Click on the ***View*** tab, click on ***Outline*** in the ***Data*** group and click on an appropriate command to expand or contract project tasks

To print a combined project:

1. Choose the appropriate level of outlining
2. Click on the ***File*** tab and click on ***Print***

To set the start date of a combined project:

1. Click on the ***Project*** tab and click on ***Project Information*** in the ***Properties*** group
2. Type a date in ***Start Date*** that corresponds to the earliest inserted project start date
3. Click on **[OK]**

To change data in a combined project:

1. Change the view in the inserted project so that you have access to the data to change
2. Edit the data as required

To save a combined project:

1. With the combined project active, click on the ***File*** tab and click on ***Save***
2. Click on **[Yes to All]** when prompted to save the inserted projects

To use only a combined file:

1. Use the ***Open*** command on the ***File*** tab to open the combined project
2. When saving or closing use the **[Yes to All]** button to make changes to all projects

To work with a subproject file:

1. Open the subproject file
2. Make the appropriate changes and save the file
3. Open the combined file to see the changes

To insert subprojects into an existing project:

1. Open the existing project
2. Click on the ***Project*** tab and click on ***Subproject*** in the ***Insert*** group
3. Select the appropriate file and click on **[Insert]**

Quick Reference

To break subproject links:

1. Double click on the subproject and click on the ***Advanced*** tab of the ***Inserted Project Information*** dialog box
2. Click on ***Link to project*** until it appears unticked and click on **[OK]**

To create a read only subproject file:

1. Double click on the subproject and click on the ***Advanced*** tab of the ***Inserted Project Information*** dialog box
2. Click on ***Read only*** until it appears ticked and click on **[OK]**

To create a task link in a project:

1. Click on the ***Project*** tab, click on ***SubProject*** in the ***Insert*** group and insert the source file
2. Select the source tasks
3. Click on the ***Task*** tab and click on ***Link Tasks*** in the ***Schedule*** group

To create a summary milestone:

1. Double click on any task that has been linked to external tasks
2. Click in the ***Duration*** cell, type **0** and press Enter

Shared Resources

To create a common resource pool file:

1. Select the resources in the current project and copy them to the clipboard
2. Create a new project file and paste the copied resources into the file

To link a project file to an external pool:

1. With the pool file open and the project file active, click on the ***Resource*** tab, click on ***Resource Pool*** in the ***Assignments*** group and click on ***Share Resources***
2. Click on ***Use resources*** and click on **[OK]**

Linking a new project to the resource pool:

1. From the new project Click on the ***Resource*** tab, click on ***Resource Pool*** in ***Assignments*** and click on ***Share Resources***
2. Click on ***Use resources*** and click on **[OK]**

To assign resources from a pool file:

1. Use the same assignment techniques as you would from an embedded resource pool

To work with a common resource pool:

1. Use the ***Switch Windows*** command to see the resource pool and check for allocation issues
2. Use the normal project techniques for eliminating any over allocations

To check the resource sharing links:

1. Click on the ***Resource*** tab, click on ***Resource Pool*** in ***Assignments*** and click on ***Share Resources***

To open a shared resource project file:

1. Use the ***Open*** or ***Recent*** commands to open the file
2. Click on ***Open resource pool…*** and click on **[OK]**

To open the resource pool file only:

1. Use the ***Open*** or ***Recent*** command on the ***File*** tab to open the file
2. Choose either ***Read-only*** or ***Read-write*** and click on **[OK]**

To create a resource master file:

1. Use the ***Open*** or ***Recent*** command on the ***File*** tab to open the resource pool file
2. Choose the third option and click on **[OK]**

To work with a resource master file:

1. Use the ***Open*** or ***Recent*** command on the ***File*** tab to open the master project file
2. When you expand a subproject click on the ***read-only*** option to open the resource pool file

Downsizing Larger Projects

To create a resource file for downsizing:

1. Open the larger project file, select the resources in a ***resource sheet***, hold down Ctrl and press ***C***
2. Create a new project, switch to a ***resource sheet*** view, hold down Ctrl and press ***V***

To create a smaller project file:

1. Use the ***Task IDs*** to select the tasks of a logical grouping, hold down Ctrl and press ***C***
2. Create a new project file, hold down Ctrl and press ***V***

Quick Reference

Quick Reference

To link a subproject to the resources:

1. Make the sub-project active
2. Click on the ***Resource*** tab, click on ***Resource Pool*** and click on ***Share Resources***
3. Point the subproject to the resource file

To prepare for the master project:

1. Save and close the subproject files
2. Click on the ***Resource*** tab, click on ***Resource Pool*** in ***Assignments*** and click on ***Share Resources*** to see the links to the other files

To create the master file:

1. Create a new blank project
2. Click on the ***Project*** tab on the ***Ribbon***, and click on ***Subproject*** in the ***Insert*** group
3. Insert the required subproject file

To set links in a master project:

1. Set the start date for the first subproject by double clicking on it to see the Inserted Project Information dialog box
2. Link across the inserted subprojects as you would across normal tasks

To finalise the downsized master project file:

1. Click on the ***Project*** tab and click on ***Project Information***
2. Type a date in ***Start date*** and click on **[OK]**

Other Applications

To copy a Gantt picture to another application:

1. Click on the ***Copy*** command drop arrow and click on ***Copy Picture***
2. Adjust the settings in the ***Copy Picture*** dialog box and click on **[OK]**
3. Use Ctrl + **V** to paste the picture

To copy table data:

1. Select the data to copy, hold down the Ctrl key and press ***C***
2. Move to the destination location, hold down the Ctrl key and press the letter ***V*** to paste the table

To copy table data to Microsoft Excel:

1. Select the table data to copy, hold down the Ctrl key and press **C**
2. Open the desired workbook and worksheet, hold down the Ctrl key and press **V**

To link data to Microsoft Excel:

1. Select the table data to copy, hold down the Ctrl key and press **C**
2. Switch to Excel and use the ***Paste Special*** command on the ***Home*** tab to paste the data in as an object

To export data to Microsoft Excel:

1. Use the ***Save As*** command to save the current project file as an Excel workbook
2. Follow the on-screen prompts from the ***Export Wizard*** using the ***Project Excel Template*** as the export format

To export data using a map:

1. Use the ***Save As*** command to save the current project file as an Excel workbook
2. Follow the on-screen prompts from the ***Export Wizard***

To create a visual report:

1. Click on the ***Project*** tab and click on ***Visual Reports*** in the ***Reports*** group
2. Click on the desired report and click on **[View]**

Microsoft Project VBA

To display the Developer tab in the Ribbon:

1. Right click anywhere on the ***Ribbon*** and click on ***Customise Ribbon***
2. Click on the tick box next to ***Developer*** in ***Main Tabs***
3. Click on **[OK]**

To record a macro:

1. Click on the ***Developer*** tab and click on ***Record Macro*** in the ***Code*** group, enter a name for the macro and click on **[OK]**
2. Perform the steps
3. Click ***Stop Recording*** on the ***Developer*** tab

Quick Reference

To run a macro:

1. Click on the ***Developer*** tab and click on ***View Macros*** in the ***Code*** group
2. Click on the desired macro and click on **[Run]**

To examine macro code:

1. Click on the ***Developer*** tab on the ***Ribbon*** and click on ***View Macros***
2. Click on the desired macro and click on **[Edit]**

To copy a macro module to the Global template:

1. Click on the ***Developer*** tab, click on ***Organiser*** and click on the ***Modules*** tab
2. Click on the desired module on the project side
3. Click on **[Copy]**

To add a macro to the QAT:

1. Right click on the ***QAT*** and click on ***Customise Quick Access Toolbar***
2. Change ***Choose commands from*** to show macros
3. Click on the macro and click on **[Add]**