

Microsoft Project 2013 Quick Reference Guide: Creating A Basic Project (Cheat Sheet Of Instructions, Tips & Shortcuts - Laminated Card)

Project 2013 Creating a Basic Project

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Setting the Project Start Date

Microsoft Project will automatically calculate the start date for a task based on the duration of the task.

1. Choose **PROJECT** > **PROJECT INFORMATION**.
2. In the **PROJECT INFORMATION** task pane, click **START DATE**.
3. Enter the start date for the project in the **START DATE** field.
4. Click **OK**.

Describing a Project

1. Choose **FILE**, **INFO**.
2. Click **PROJECT INFORMATION** in the left-hand pane.
3. Click **THE SUMMARY** tab.
4. Enter a description for the project in the **DESCRIPTION** field.
5. Select a category for the project in the **CATEGORY** list.
6. Enter your **CUSTOMER** and **CONTACT** information.
7. Enter a **START DATE** and **END DATE** for the project.

Switching to a Different View

Choose a view from the **VIEW** tab in the **PROJECT INFORMATION** task pane.

- **GAUNT CHART** (default view)
- **NETWORK** (default view)
- **RESOURCE USAGE** (default view)
- **RESOURCE LEVELING** (default view)
- **RESOURCE USAGE** (default view)
- **RESOURCE LEVELING** (default view)

Switching to an Unlinked View

1. Choose **VIEW**, **VIEW INFORMATION**.
2. Select the view you want to use.

Entering Task Information in a Sheet

Enter task information in the **Task Sheet** view.

1. Choose **VIEW**, **VIEW INFORMATION**.
2. Click **Task Sheet** in the **Task Sheet** view.
3. Enter a name for the task in the **Task Name** column.
4. Enter a duration for the task in the **Duration** column.
5. Enter a start date for the task in the **Start** column.
6. Enter an end date for the task in the **Finish** column.

Entering or Changing a Task Duration

Enter a duration for a task in the **Task Sheet** view.

1. Select the task in the **Task Sheet** view.
2. Enter a duration for the task in the **Duration** column.
3. Press **Enter**.

Using Automatic Scheduling

If you want task dependencies to automatically calculate task dates, disable the **Task Manually Scheduled** feature.

Before entering tasks, or on an existing task:

1. Choose **PROJECT**, **PROJECT INFORMATION**.
2. In the **PROJECT INFORMATION** task pane, click **Task Manually Scheduled**.
3. Click **Off**.

Sequencing Tasks Quickly

Use the **Task Sheet** view to quickly sequence tasks.

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Enter a task ID for the task in the **Task ID** field.
5. Enter a task name for the task in the **Task Name** field.
6. Enter a duration for the task in the **Duration** field.
7. Enter a start date for the task in the **Start** field.
8. Enter an end date for the task in the **Finish** field.

Unlinking Tasks

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **Unlink**.

Changing Data in One or More Rows

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Enter a task ID for the task in the **Task ID** field.
5. Enter a task name for the task in the **Task Name** field.
6. Enter a duration for the task in the **Duration** field.
7. Enter a start date for the task in the **Start** field.
8. Enter an end date for the task in the **Finish** field.

Inserting a Task

1. Activate a task in the **Task Sheet** view.
2. Select a task in the **Task Sheet** view.
3. Click **Task**, **Task Information**.
4. In the **Task Information** task pane, click **Task Information**.
5. Enter a task ID for the task in the **Task ID** field.
6. Enter a task name for the task in the **Task Name** field.
7. Enter a duration for the task in the **Duration** field.
8. Enter a start date for the task in the **Start** field.
9. Enter an end date for the task in the **Finish** field.

Clearing or Deleting Rows

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **Clear**.

Zooming in a View

Zoom in on a task in the **Task Sheet** view.

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **Zoom In**.

Moving or Copying Rows

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **Move**.

Copying Data to Adjacent Cells

Copy data from one cell to another in the **Task Sheet** view.

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **Copy**.

Changing Gantt Chart Appearance

1. Choose **VIEW**, **VIEW INFORMATION**.
2. Click **Gantt Chart** in the **Gantt Chart** view.
3. Click **Task**, **Task Information**.
4. In the **Task Information** task pane, click **Task Information**.
5. Click **Appearance**.
6. Click **Task**, **Task Information**.
7. In the **Task Information** task pane, click **Task Information**.
8. Click **Appearance**.

Viewing the Task Path

Highlight the task path for a task in the **Task Sheet** view.

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **View**.

safeguarding Project Files

Use the **File** tab to safeguard project files.

1. Choose **FILE**, **SAFEGUARD PROJECT**.
2. Click **Yes**.

Reviewing SmartTags

Review smarttags in the **Task Sheet** view.

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **SmartTags**.

Keyboard Shortcuts

Task Name	Task ID
Task Name	1
Task Name	2
Task Name	3
Task Name	4
Task Name	5
Task Name	6
Task Name	7
Task Name	8
Task Name	9
Task Name	10

Working in the Gantt Chart

Work in the **Gantt Chart** view.

1. Choose **VIEW**, **VIEW INFORMATION**.
2. Click **Gantt Chart** in the **Gantt Chart** view.
3. Click **Task**, **Task Information**.
4. In the **Task Information** task pane, click **Task Information**.
5. Click **Appearance**.
6. Click **Task**, **Task Information**.
7. In the **Task Information** task pane, click **Task Information**.
8. Click **Appearance**.

Deleting Rows

Delete rows in the **Task Sheet** view.

1. Select the task in the **Task Sheet** view.
2. Click **Task**, **Task Information**.
3. In the **Task Information** task pane, click **Task Information**.
4. Click **Delete**.



Synopsis

Laminated quick reference guide showing step-by-step instructions and shortcuts for how to use Microsoft Office Project 2013. This guide is suitable as a training handout, or simply an easy to use reference guide, for any type of user. The following topics are covered: Setting the Project Start Date, Describing a Project, Switching to a Different View, Switching to Unlisted Views, Undoing Changes. Entering Task Information in a Sheet, Entering or Changing Task Duration, Using Automatic Scheduling, Sequencing Tasks, Unlinking Tasks, Changing Data in One or More Rows, Inserting a Task, Clearing or Deleting Rows, Zooming in a View, Moving or Copying Rows, Copying Data to Adjacent Cells. Changing Gantt Chart Appearance, Viewing the Task Path, Safeguarding Project Files, Reviewing SmartTags. Setting the Calendar, Creating a New Group Calendar. Entering a Resource, Entering a Cost Resource, Entering a Consumable Resource, Booking a Resource to a Task, Using Resource-Driven Scheduling. Saving the Baseline, Showing Planned vs. Actual in the Gantt Chart, Displaying Project Statistics, Recording Actual Progress of Tasks. Setting up the Printout, Previewing and Printing, Printing Reports, Transferring Data to Other Project Files. Also includes a list of Selection and Movement Shortcuts. This guide is one of two titles available for Project 2013: Project 2013 Creating a Basic Project, Project 2013 Managing Complexity.

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Customer Reviews

Great for a handy desk cheat sheet! Has many of those once in a while used items that you don't always remember. It is also a great tool when upgrading to the 2013 software as the layout has changed slightly.

This flow chart was purchased for the mere fact that I wanted to get familiar with the nine knowledge areas of project management. This being a vital segment of my master program. I highly recommend this product for those pursuing a career in project management.

These are handy to have for homework and learning or for a test if you have an open book type. They typically are not deep in their subject but will give you the basic reference and more to refresh your memory or get you started.

This 2013 Quick Reference Guide is a helpful quick guide. I keep it by my PC as my first reference guide. I hope in the future that the font size is enlarged. I would purchase a 2-page set in preference to this 1-page to have a larger font.

easy to locate the area that you are working on, the text was easy to understand and apply to the area that was giving me problems

Shipped fast, excellent reference, very comprehensive approach for just a two page card. Keep it under your keyboard!

Not a great reference guide at all. Especially if your trying to get back into the swing of things.

I use this to help me learn features of the program and jog my memory when controlling projects.

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