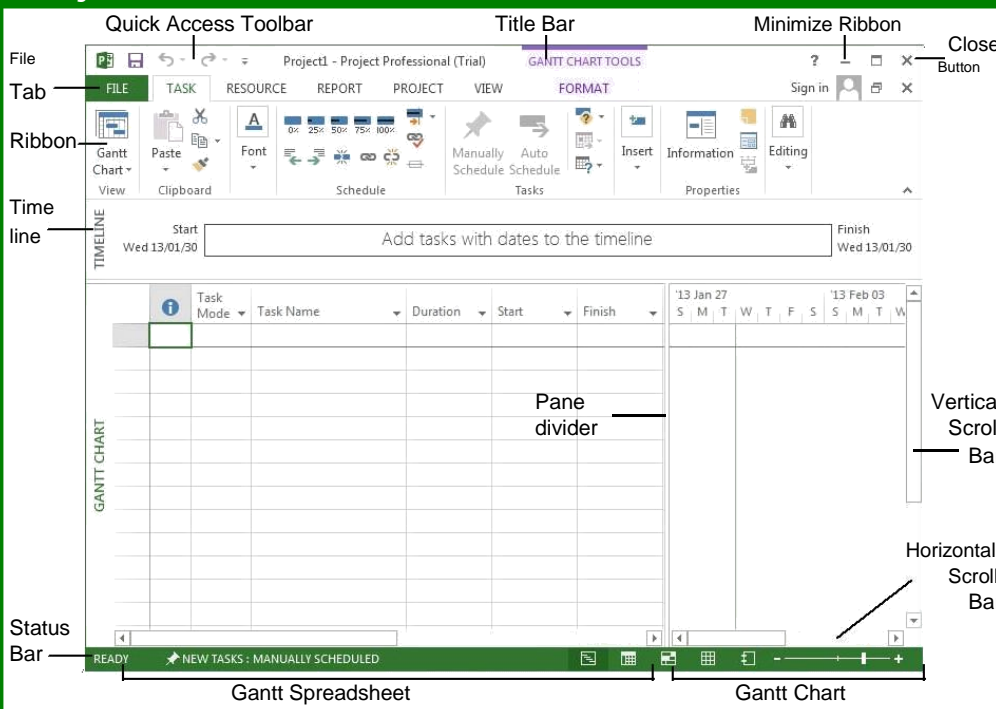


Project 2013

Quick Reference Card

Project 2013 Screen



Common Views

To Display a View: Select the **VIEW** tab and choose from the Task Views available.

Gantt Chart: Default view. Displays a list of tasks with bar chart information.

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

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

Calendar: Displays tasks and durations in a monthly calendar.

Other Views: Provides additional views:

- **Task Form:** Detailed information of the select task.
- **Task Sheet:** List of all the tasks and selected details.
- **Timeline:** An expanded view of the timeline.

Keystroke Shortcuts

Save Project File	<Ctrl> + <S>
Close Current Project	<Ctrl> + <W>
Open Existing Project	<Ctrl> + <O>
Print/Print Preview	<Ctrl> + <P>
Task or Resource Information	<Shift> + <F2>
Assign Resources	<Alt> + <F10>
Copy	<Ctrl> + <C>
Cut	<Ctrl> + <X>
Paste	<Ctrl> + <V>
Help	<F1>
Go To Selected Task	<Ctrl> + <Shift> + <F5>
Link Selected Task	<Ctrl> + <F2>
Unlink Selected Task	<Ctrl> + <Shift> + <F2>
Create a Hyperlink	<Ctrl> + <K>
Zoom In	<Ctrl> + <+>
Zoom Out	<Ctrl> + <Shift> + <+>
Undo	<Ctrl> + <Z>
Redo	<Ctrl> + <Y>
Bold	<Ctrl> +
Italics	<Ctrl> + <I>
Underline	<Ctrl> + <U>

Project 2013 Fundamentals

- **To Create a New Project:** Click the **FILE** tab, click the **NEW** tab and click the **Blank Project** option. Or press <Ctrl> + <N>.
- **To Use a Template:** Click the **FILE** tab, click the **NEW** tab. Select a template from the menu and click **OK**.
- **To View Information About the Project:** Select the **PROJECT** tab and click **Project Information** in the Properties group.
- **Set the Working Time Calendar:** Select the **PROJECT** tab and click **Change Working Time** 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 **Start** and **Finish** boxes.
- **To Use Spell check:** Select the **PROJECT** tab and click **Spelling** in the Proofing group.
- **To Use Undo and Redo:** Click the **Undo** button and **Redo** button on the Quick Access toolbar.
- **To Adjust the Timescale:** Select the **VIEW** tab and choose from the options in the **Timescale** list arrow in the Zoom group.
- **To Adjust the Zoom Level:** Select the **VIEW** tab and click the **Zoom** button to either zoom in or zoom out. Alternatively, click the **Entire Project** button to zoom to a level where the whole project is visible.
- **To Save a Project File:** Click the **Save** button on the Quick Access toolbar or click **FILE** tab and select **Save** or **Save As** if you wish to change the file name or location.
- **To Set a Baseline Plan:** Click the **PROJECT** tab, click the **Set Baseline** drop list arrow in the Schedule group and choose **Set Baseline**. Click the **Set Baseline Plan** option, choose the baseline number, save the plan for the entire project or selected tasks, and click **OK**.
- **To Set an Interim Plan:** Click the **PROJECT** tab, click the **Set Baseline** drop list arrow in the Schedule group and choose **Set Baseline**. Select the baseline details and click **OK**. Click the **Set Interim plan** option, choose where to copy from and where they should be copied into, save the plan for the entire project or selected tasks, and click **OK**.
- **To Show or Hide the Planning Wizard:** Click the **FILE** tab and click **Options**. Click the **Advanced** tab and either select or deselect the **Advice from Planning Wizard** checkbox.
- **To View a Task's Usage:** Select the task and click the **View** tab. Click the **Task Usage** button in the Task Views group.
- **To Get Help:** Press <F1> to open the Project Help task pane, type your question, and click the **Search** button.

Plan and Manage the Project

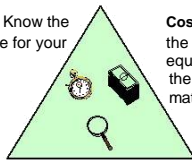
- There are six basic steps to follow when planning a project: (1) Define a project (2) Plan project activities (3) Plan for and gather resources (4) Plan project costs (5) Plan for quality and risks (6) Plan security and communication.

- 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.

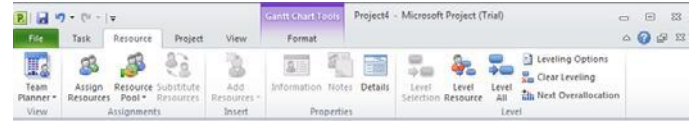


Cost – This includes the people and the equipment that do the work, and the materials they use.

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

Working with Resources and Costs

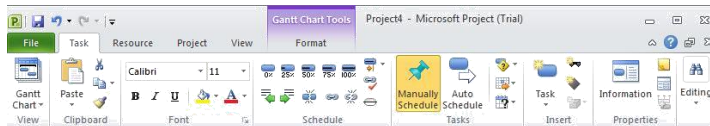
The Resource Tab



- **To Enter Resource Availability:** Click the **Information** button in the Properties group. 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 and click the **Assign Resources** button, select the resource(s) and click **Assign**.
- **To Enter Costs:** Click the **Information** button in the Properties group and click the **COSTS** tab. Enter amounts in the **Standard Rate** field, the **Overtime Rate** field, or the **Per Use Cost** fields. Then choose when you'd like to begin accruing the resource cost in the **Cost Accrual** field.

Working with Tasks

The Task Tab



- **To Enter a Task:** Type the task's name in the Task Name column and press **<Enter>**.
- **To Enter a 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:** Enter 0 (zero) in the Duration column. Or, click the **Information** button in the Properties group, select the **ADVANCED** tab and click the **Mark task as Milestone** check box.
- **To Create a Recurring Task:** Click the **Task** list arrow in the Insert group and select **Recurring Task** from the list. Enter information into the Recurring Task Information dialog box.
- **To Access Task Information:** Select the task and click the **Information** button in the Properties group. Or, press **<Ctrl> + <F2>**.
- **To Organize the Task List:** Create summary tasks and subtasks by selecting the task(s) and clicking the **Outdent Task** or **Indent Task** buttons in the Schedule group.
- **To Link Tasks:** Press **<Ctrl>** and select the two tasks you want to link in the order that you want to link them and click the **Link Tasks** button in the Schedule group.
- **To Unlink Tasks:** Press **<Ctrl>** and select two linked tasks in the order they are linked. Click the **Unlink Tasks** button in the Schedule group.
- **To Split a Task:** Select the task, click the **Split Tasks** button in the Schedule group, and use the dividing tool to split the task's Gantt bar.
- **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 select a date in the Deadline box, or select the relevant constraint and enter the Constraint date.
- **To Assign a Task Calendar:** Select the task, click the **Information** button in the Properties tab and click the **Advanced** tab. Click the **Calendar** list arrow and select a calendar from the drop-down list.
- **To Apply a Filter:** Click the **Filter** list arrow for the relevant column and select the filter you want to apply to the project.

Viewing the Project

- **Applying a Split View:** Select one of the options from the **Timeline** or **Details** list arrows in the Split View group on the VIEW tab.
- **Applying Groups:** Select one of the options from the **Group By** list arrow in the Data group on the VIEW tab.
- **Applying Filters:** Select one of the options from the **Filter** list arrow in the Data group on the VIEW tab.
- **Sort the Information:** Select one of the options from the **Sort** list arrow in the Data group on the VIEW tab.
- **View the Critical Path:** In the Gantt Chart View, select **Critical** from the options in the **Highlight** list arrow in the Data group on the VIEW tab.

Tracking Progress

Always save a baseline plan before beginning to track progress.

- **Update Tasks:** Select the task you want to update and select the percentage complete in the Schedule group on the TASK tab.
- **Update Resources:** In Resource Usage or Task Usage view, select the resource you wish to update, click the **Details** button in the Properties group on the RESOURCE tab and update the Work value.
- **Update Costs:** Turn off automatic cost updating: click the **FILE** tab and select **Options**. Click the **Schedule** tab and select the **Off** option for Calculate project after each edit at the bottom of the menu.
- **Check Project Variance:** In a task or resource view, click the **VIEW** tab and click the **Tables** list arrow. Click **More Tables** and select **Variance** from the options.

Balancing the Project

- **To Identify an Overallocated Resource:** In the Resource Usage View, select **Overallocated Resources** from the options in the **Highlight** list arrow on the VIEW tab.
- **To Balance Overallocated Resources Automatically:** Click the **Leveling Options** button in the Level group on the RESOURCE Tab. Select **Automatic** under Leveling Calculations.
- **To Reassign Work:** Open **Gantt Chart** view, select the overallocated resource and click the **Assign Resources** button in the Assignments group on the RESOURCE tab. Select the overallocated resource, click the **Remove** button, select another resource and click **Assign**.