Cheatography

Microsoft Project 2016 Cheat Sheet

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Project Setup and Information

New Project	To create a new project, click the [File] tab, then click [Open], then choose either a blank project or a premade template.
Excel Import	To create a new project from Excel data, click the [File] tab, then click [New], then click the "New from Excel Workbook" icon
Project Information	View project information such as start date, end date, and project statistics by clicking the [Project] tab and clicking "Project Information".
Set Baseline	To set your project baseline, click the [Project] tab, then click "Set Baseline". You must be in Gantt Chart View.

WBS Tasks

Create a Task	To create a new task, simply enter information into a blank cell in the main WBS window, or by go to the [Task] tab and click the "Task" button.
Recurring Tasks	To create a recurring task, such as a weekly meeting, click the [Task] tab, then click the drop down arrow on the "Task" button, then choose "Recurring Task".
Milestones	To set a milestone, Go to the [Task] tab, and click the "Milestones" button. To link the milestone to a task, highlight both the milestone and the task and click
Summary Tasks	To set a new summary task, Go to the [Task] tab and click "Summary". If you want to group existing tasks together under a new summary task, highlight the subtasks and click "Summary Task".
Link Tasks	Link tasks to show a predecessor/successor relationship between them. Go to the [Tasks] tab, then click

WBS Tasks (cont)

Critical Path	You can view the Critical Path while in Gantt Chart View. To open Gantt Chart view, go to the [View] tab and click "Gantt Chart". To view the Critical Path, go to the [Format] tab, then check ☑ the "Critical Tasks" box.

Calendar and Schedule

View Calendar	To view the calendar of events, click the [View] tab and click "Calendar".
Edit Calendar	To access the Calendar for a project, click the [Project] tab, then click the "Change Working Time" button.
Workday Exceptions	To set individual workday exceptions, such as for a holiday, click the [Project] tab, then click "Change Working Time", and choose the "Exceptions" tab on the table in the lower left.
Change Work Hours	To change work hours for a calendar, click the [Project] tab, then click "Change Working Time", click the "Work Weeks" tab in the table below, then click the "Details" button to the right of the table.

Resources

Resource Sheet	To view or edit your resources, click the [View] tab, then click the "Resource Sheet" button. You can also click the "Resource Sheet" icon at the bottom right of the window.
Create Resource	To create a new resource, click the [View] tab and click "Resource Sheet". Then, click the [Resource] tab, and click "Add Resources".
Assign Resource	To assign a resource to a task, click the [Resource] tab and click "Assign Resources".

Resources (cont)

Resource Usage	To review your resource usage, click the [View] tab, then click "Resource Usage".
Task Resource Usage	To view your resource usage by task, click the [View] tab, then click "Task Usage". Also, you can click the "Task Usage" button at the bottom right of the window.

Views

The following views are accessible as buttons in the lower left of the Project interface window:

Gantt View	The default view, featuring a Gantt Chart of the project in the main right panel.
Task Usage	Features a calendar which shows resource usage on the right panel.
Team Planner	The main panel features a chart where each row is a resource, while on the right is a calendar showing the tasks assigned to those resources.
Resource Sheet	An editable list of resources and their information.

Other Views:

Network Diagram	To view the network diagram, click the [View] tab and click "Network Diagram".
Split View	The split view allows you to open a details panel below the main panel to display various views such as task usage, resource usage, a network diagram, etc., while still viewing the main panel. To access split view, click the [View] tab, and check ☑ "Details". To choose which view, use the drop box directly to the right.

Reports

The following reports are available from the Report Tab:

Work Overview	View the man-hours resources allocated by clicking the down arrow on the "Dashboards" button, and selecting "Work Overview".
Resource Overview	To view an overview of resources, click the down arrow on the "Resources" button, and select "Resource Overview".
Task Cost Overview	To view an overview of tasks cost, click the down arrow on the "Costs" button, and select "Task Cost Overview".
Earned Value Report	To access an Earned Value Report, click the down arrow on the "Costs" button and select "Earned Value Report".
Excel Reports	Project can export data to generate reports to be viewed in Excel. To generate Excel reports, click the "Visual Reports" button, then choose which report to generate.