BrainStorm Quick Start Card for

Microsoft® Project® 2010

BRAINSTORM
Teaching Software. Teaching People.

Getting Started

Microsoft® Project® 2010 delivers all the tools you need to effectively manage your projects and programs. With a new visually enhanced interface and powerful tools like the Team Planner and automatic scheduling, you can spend less time planning your projects and more time managing them. Project 2010 introduces new Microsoft Excel®-like functionality, making planning your projects more intuitive than ever. And since Project 2010 is now part of the Microsoft Fluent User interface, working in Project is a familiar experience, with features like the Ribbon, Backstage view, and improved right-click menus. Project 2010 makes managing your projects simple, helping you meet crucial deadlines and be successful in whatever you plan.

Quick Access Toolbar: Quickly find frequently used commands on the customizable Quick Access Toolbar.

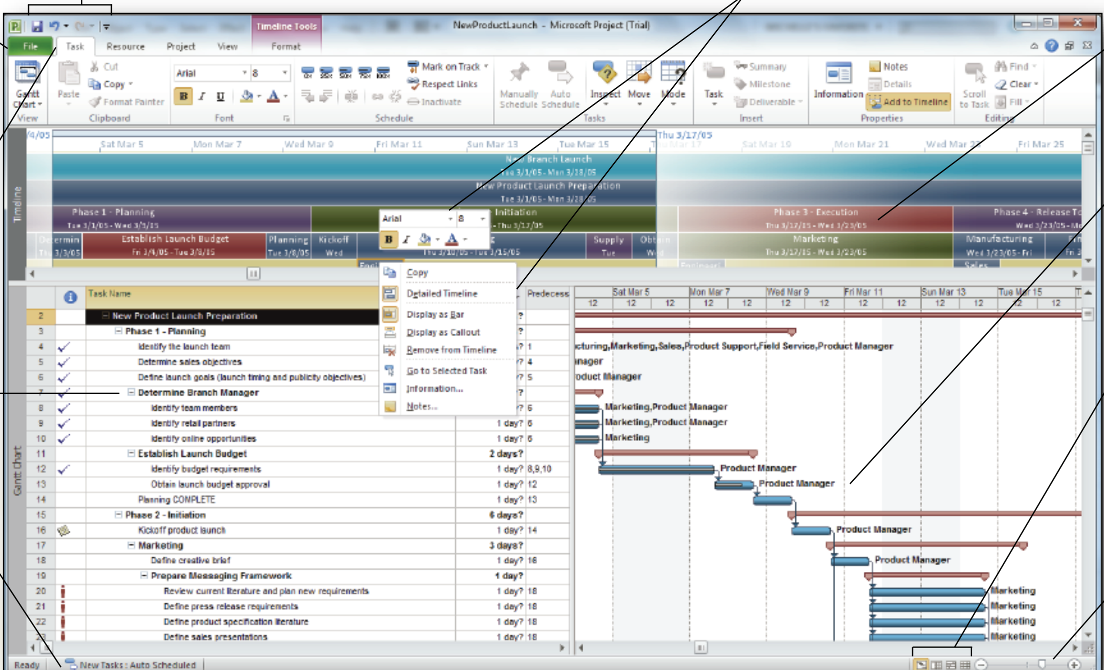
Right-click Menu: New Quickly view commonly used commands with expanded right-click menus.

Backstage View: New Click the File tab to save, print, share, or publish your project.

The Ribbon: New Use the fully customizable Ribbon tabs to access the features you need to create a project.

Task Sheet: Enter task information into an Excel-like worksheet.

Status Bar: View information about your project. Right-click to customize the options you want to display.



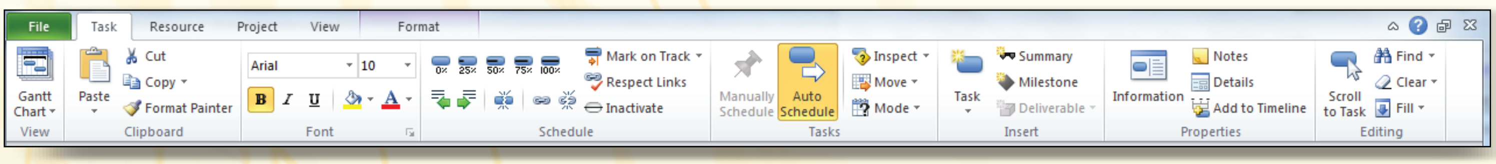
Timeline View: New See a concise overview of your project schedule.

Gantt Chart: See task information in a graphic chart that updates with your task sheet.

View Bar: New Change the viewing mode of a project to Gantt Chart, Task Usage, Team Planner, or Resource Sheet.

Zoom Slider: New Quickly zoom into or out of the time-phased part of any view.

The Ribbon New



No more digging through menus and dialog boxes to find the tools you need. The Ribbon makes finding your favorite tools simpler than ever. With access to graphical menus and contextual tabs, you never have to guess where your tools are hiding.

THE RIBBON UNWOUND: Find all your favorite tools, and customize the Ribbon just the way you want it.

Keyboard Shortcuts

Description	Shortcut Key	Description	Shortcut Key	Description	Shortcut Key
Insert a row	Insert	Move to end of project	Alt+End	Display task information	Shift+F2
Delete a row	Ctrl+Minus Sign	Move to beginning of project	Alt+Home	Show task on Gantt chart	Ctrl+Shift+F5
Indent a task	Alt+Shift+Right Arrow	Scroll timescale left	Alt+Left Arrow	Set task to auto schedule	Ctrl+Shift+A
Outdent a task	Alt+Shift+Left Arrow	Scroll timescale right	Alt+Right Arrow	Set task to manual schedule	Ctrl+Shift+M
Show all tasks	Alt+Shift+Asterisk	Move to the first field in a row	Home	Turn on/off auto calculate	Ctrl+F9
Show all subtasks	Alt+Shift+Plus Sign	Move to the last field in a row	End	Turn on/off extend selection	F8
Hide all subtasks	Alt+Shift+Minus Sign	Move to the first row	Ctrl+Up Arrow	Display Field Settings dialog box	Alt+F3
Link tasks	Ctrl+F2	Move to the last row	Ctrl+Down Arrow	Activate the menu bar	F10
Unlink tasks	Ctrl+Shift+F2	Activate the entry bar	F2	Activate the control menu	Alt+Spacebar

Links to additional online content are indicated throughout this card by the symbol to the left. Visit **BrainStormInc.com/cards/project2010**.

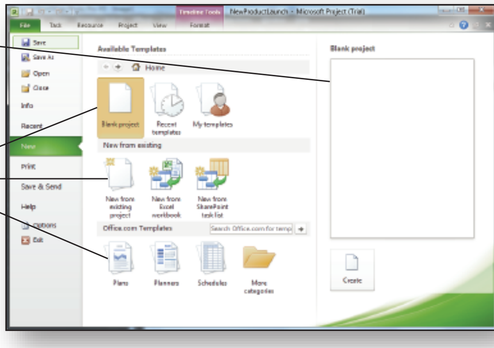
For use by Beaumont employees only

Creating a New Project

Whether you're starting a project from scratch, from an existing source, or from a template, the New tab in Backstage view will get you started.

Preview your project before you create it.

Create a blank project from a template of your own, from a Microsoft.com template, or from an existing source.

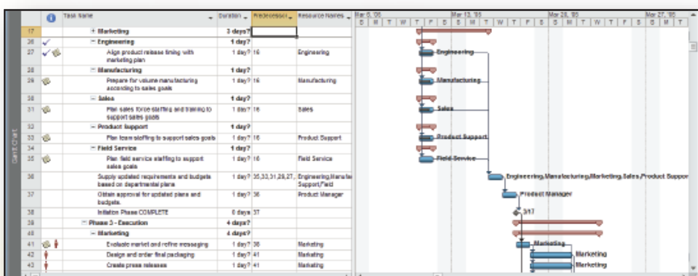


To start a new project:

1. On the File tab, click **New**.
2. Choose to start a Blank Project or a project from a template, OR choose to create a project from an existing project, Excel workbook, or SharePoint® task list, and then navigate to the existing file.
3. Click **Create**.

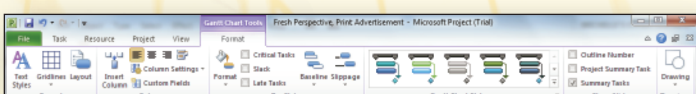
Understanding the Gantt Chart

Having a hard time visualizing your project? With the Gantt Chart view, your screen is split between the task sheet on the left and a graphical chart on the right, so you never have to guess what your project entails. Changes to either side of the view affect both sides, saving you time and making visualizing your project effortless.



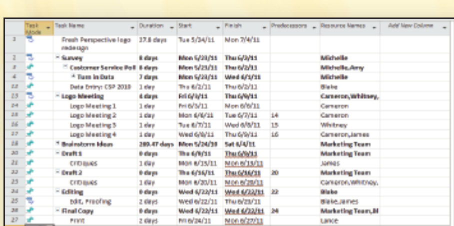
Formatting the Gantt Chart New

In Project 2010, you're the creative genius. With your insertion point anywhere in the Gantt chart, the Gantt Chart Tools contextual tab appears on the Ribbon, allowing you to format the Gantt chart how you want. You can adjust the look by using a variety of installed styles, or you can create your own style. You can format the layout of the chart, how certain tasks appear, and much more.



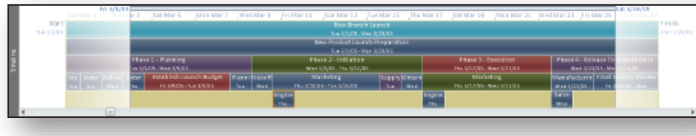
Using the Task Sheet

The task sheet is at the heart of Project 2010. Here, you enter and organize all the key information in your project. And now, the task sheet is easier to use than ever before because Project 2010 comes loaded with Excel-like functionality, boasting features like auto complete, automatic text wrap, and filtering.



Using the Timeline View New

Need a clearer picture of how your project will pan out? Project 2010 introduces the timeline view, which gives a concise overview of your entire project schedule. The Timeline view is automatically displayed above other views, helping you better see tasks, milestones, and phases, so you always know what's coming.



Formatting a Timeline New

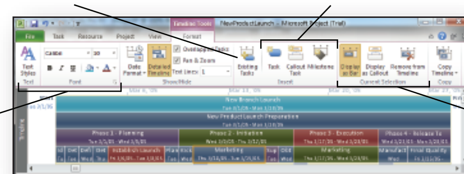
With Project 2010, you're in the driver's seat. You can adjust a timeline's appearance and which tasks display on the timeline, helping you see pertinent information at a glance. And thanks to new text and design tools, you can feel confident your timeline looks its best.

Edit which tasks appear on the timeline.

Insert project tasks and milestones.

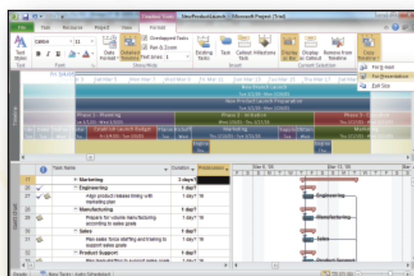
Set text styles and adjust font, font size, color, and more.

Choose how the selected task will display on the timeline.



Sharing a Timeline New

Sharing your project's schedule doesn't have to be a hassle. Quickly copy your timeline into an e-mail message, presentation, or document without compromising the formatting.



To share a timeline:

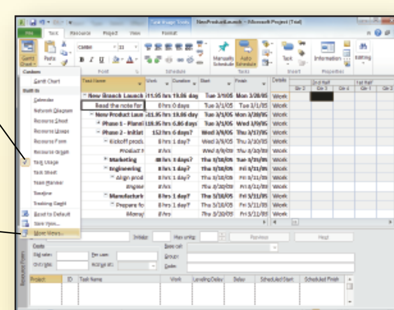
1. Click the **Timeline Tools Format** contextual tab.
2. In the Copy group, click **Copy Timeline**, and select where you want to copy your timeline.
3. Paste the timeline in the desired location.

Changing Views

No matter what your scheduling phase, Project has a view for it. From outlining your project to assigning resources and tracking progress, there is always a view to make planning and executing your project as seamless a possible. And because working in the right view helps you plan more effeciently, Project 2010 makes it easy to change views from the Task, Resource, and View tabs on the Ribbon.

Select the best view to get the job done. From adding tasks to assigning resources and checking project milestones, there is a view to aid you.

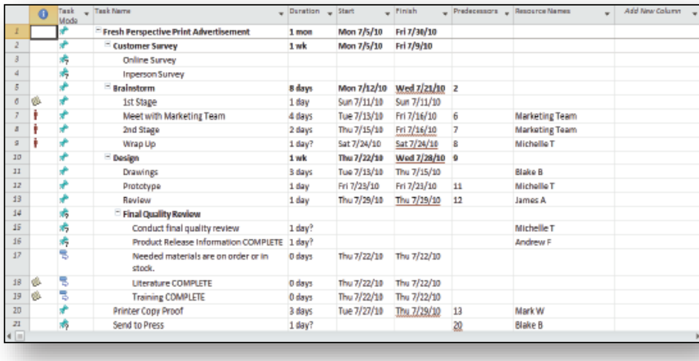
Access additional views, such as the Bar Rollup, Detail Gantt, Leveilng Gantt and Milestone Rollup.



SURVEY THE SCENE: View Project 2010 your way. Learn how to choose from more than 25 available views to organize your project.

Working with Tasks

Whip any project into shape with tasks, which set the framework for a project and detail what needs to be accomplished. With tasks you'll know what actions to take so you can confidently manage and successfully complete your project.



Creating New Tasks

Dissect your project into easy-to-digest tasks. Tasks help give your project scope so you'll know just what needs to be accomplished to meet deadlines and achieve amazing results.

To create a new task:

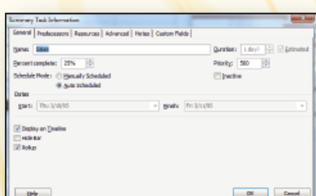
1. On the task sheet, under Task Name, select any empty field. To insert a new task between existing tasks, select the row below where you want the task to appear and click **Task** on the Task tab.
2. Enter the task's name.
3. Press the **RIGHT ARROW** to fill in information for other fields.

BECOME A TASK MASTER: Learn the ropes of setting up and managing tasks to make a more effective project management plan.

Adding a New Column

Adding new columns to the task sheet has never been so easy. Simply click the **Add New Column** heading at the right of the task sheet and type the column heading name you prefer, OR select from a list of preset heading options by clicking the heading arrow. Adjusting the name of an existing column works the same way, so you are never stuck digging through menus and dialog boxes to add and customize task headings.

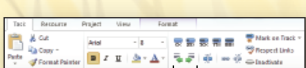
Defining Task Information



Because every task is different, so is the information you enter for each task. That is why Project allows you to define task information; you are never stuck when the task sheet just doesn't cut it. With a task selected, click the **Information** button on the Task tab to open the Task Information dialog box. Here you can easily edit task information or define advanced task information for the more complicated tasks. By selecting multiple tasks at once, you can enter repeating information for selected tasks just once.

Organizing Tasks

Not all tasks are created equal. Organize the hierarchy of tasks in your project with no fuss so you can have a clear picture of your project's primary and secondary tasks.

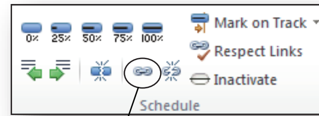


To indent or outdent a task:

1. Select the task you want to make a primary task or subtask.
2. On the Task tab, in the Schedule group, click **Indent Task** to create a subtask, OR click **Outdent Task** to create a primary task.

Linking Tasks

It's time to play matchmaker, because in Project 2010, linking tasks is as easy as 1, 2, link. Linking tasks shows the relationship between tasks so you always know which tasks depend on each other.



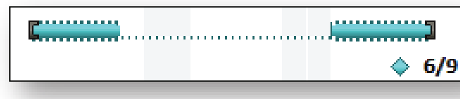
To link tasks:

1. Select two or more tasks you want to link, in the order you want to link them.
2. On the Task tab click the **Link Tasks** button.
3. To unlink a task from its dependencies, select the task and click the **Unlink Tasks** button.

Note: By default, Project creates a start-to-finish task link. You can change the link to start-to-start, finish-to-finish, or start-to-finish.

Splitting a Task

Not every task goes from start to finish without interruption or breaks. So why not reflect that in your project's plan? Splitting tasks allows you to do just that.



To split a task:

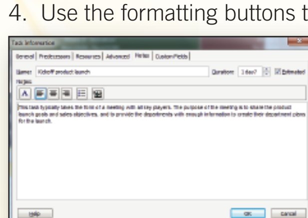
1. Select the task you want to split.
2. On the Task tab, in the Schedule group, click **Split Task**.
3. On the Gantt bar graph, click the area of the bar that corresponds to the date where you want work to stop, and then drag the second part of the bar to the date where you want work to begin again.

Creating Task Notes

Have important information about a task that you need to remember or share with others? Don't waste time creating memos that will be lost or forgotten; instead put notes directly into Project.

To create a task note:

1. Select the task you want to add notes to.
2. On the Task tab, in the Properties group, click **Task Notes**.
3. Type your notes.
4. Use the formatting buttons to adjust text formatting. Add pictures or objects to the note by clicking the **Insert Object** button.

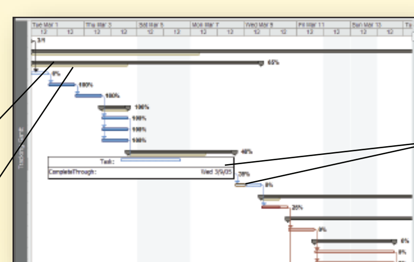


5. Click **OK**.
6. A note indicator will appear next to the task on the task sheet. Rest on the icon to view notes, or click it to open Task Notes.

Calculating Task Completion

Keep your project up to date by tracking the progress of your project as you go. With the Tracking Gantt chart, you can compare actual data to baseline data and see each task's percent complete. Easily change the percentage complete for a task in the Tracking Gantt chart, OR change the task completion right from the Task tab by selecting a completion percentage button in the Schedule group. For more accurate percentages, use the Task Information dialog box.

See baseline data atop actual data to quickly see slippage or overestimates.



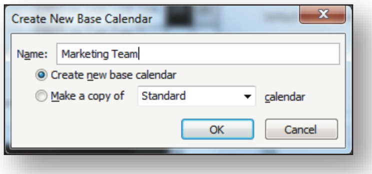
Click and drag over a task to easily adjust the percentage completed.

Visit **BrainStormInc.com/cards/project2010**.

Creating Calendars

Calendars allow you to set general working and non-working times for your project. By default, all tasks are scheduled to the project calendar, but you can also create task calendars to define unique working times for specific tasks within your project.

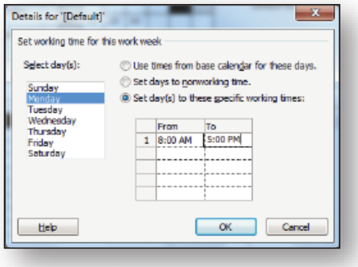
To create a new calendar:



1. On the Project tab, in the Properties group, click **Change Working Time**.
2. Click **Create New Calendar**.
3. Type a name for the calendar, and then choose whether to create a new base calendar or a copy of an existing calendar.
4. Click **OK** to return to the Change Working Time dialog box.

To change the general working and nonworking times for a calendar:

1. In the For Calendar list, choose the calendar you want to change.
2. Click the **Work Weeks** tab.
3. Select the default work-week, and then click **Details**.



4. Select each day, and choose whether to use the project default times for that day, to make it a nonworking day, or to set specific working times.
5. Click **OK** to close the Details dialog box.
6. Click **OK** to close the Change Working Time dialog box.

Once you create a new base calendar, you need to assign it to tasks.

To assign a calendar to a task:

1. In the Gantt Chart view, choose the task you want to assign a new calendar to.
2. On the Task tab, in the Properties group, select **Information**.
3. Click the **Advanced** tab.
4. From the **Calendar** list, select the calendar you want.
5. Click **OK**.

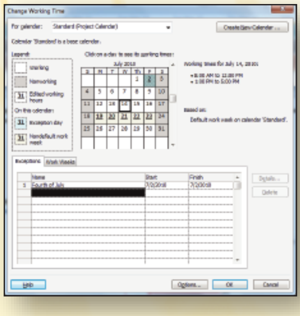
Note: If you are using Project 2010 Professional with Project Server, only a person with administrative privileges can edit the project calendar.

SCHEDULE SAVVY: Save your calendars for later use so you don't have to re-create it for each new project.

Defining Nonworking Times

Need a break? We all do. That's why your project's plan should reflect non-working times, like nights and weekends, and special nonworking times, like vacations and holidays.

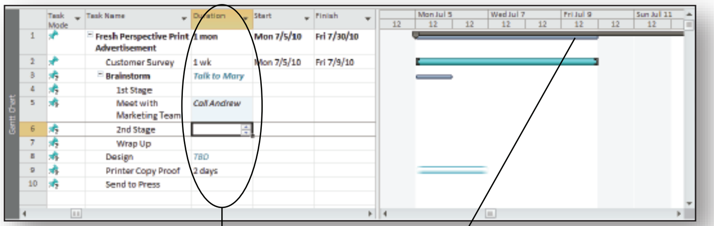
To define special non-working times:



1. On the Project tab, in the Properties group, click **Change Working Time**.
2. In the For Calendar list, choose the calendar you want to change.
3. Click the **Work Weeks** tab to create workweek schedules that differ from the normal workweek. Click the **Exceptions** tab to enter exception days, like holidays.
4. In the **Name** column, type a descriptive name.
5. Enter start and finish times for the change.
6. Click **Details** to define how the change will occur, whether as a nonworking day or a working day with specific working times.
7. Click **OK**.

Working with User-Controlled Scheduling New

Working with deadline estimates can be a real hang-up during the early stages of planning a project. But don't let incomplete information and fuzzy deadlines stop you from creating a well-structured project. With Project 2010 you can manually schedule your tasks, allowing you to begin planning a project from the get-go, before all the dates and deadlines are hammered out. And because Project now uses a top-down approach, you can make your subtasks fit into the time frame of your primary tasks rather than the other way around.



With manual scheduling you can enter the duration information you do know, even if it is not a numeric value.

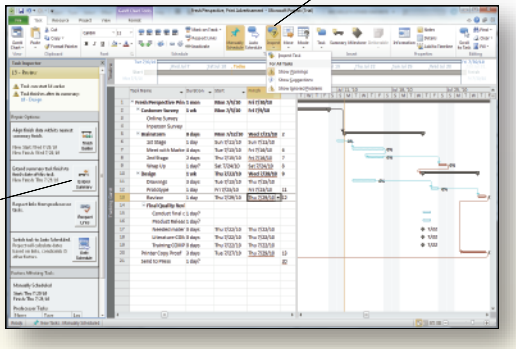
The blue bar is a rollup of subtasks, helping you know what buffer time you have in your schedule.

Inspecting Tasks New

Use the Task Inspector to recognize potential issues in your project's plan, and solve them before they become a problem. Like the spelling checker in Microsoft Word, the schedule checker in Project highlights problematic tasks in your schedule by using a red squiggly line. Right-click the red squiggly to reconcile the issue.

To inspect a task in the Task Inspector:

1. Right-click a task date that has a red squiggly underneath it, and select **Fix in Task Inspector**, or select the task you want to inspect, and on the Task tab, in the Tasks group, choose **Inspect**.
2. The Task Inspector opens on the left of the Gantt chart. In the Task Inspector, choose an action. Project will fix the task according to your selected action.



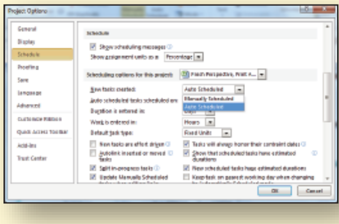
Automatically Schedule Tasks New

Some projects are too complex to schedule manually, and some tasks are just not worth the effort. Fortunately, you turn off manual scheduling for specific tasks or for an entire project.

To automatically schedule a task:

1. Select the task or tasks you want to switch to automatic scheduling.
2. On the Task tab, in the Tasks group, select **Auto Schedule**. Project will now automatically update the tasks dates based on links and subtasks.

To switch an entire project to auto schedule:



1. Click the **File** tab to open Backstage view.
2. Click **Options**.
3. Click **Schedule**.
4. Under New tasks created, choose **Auto Schedule**.
5. Click **OK**.

Managing Resources

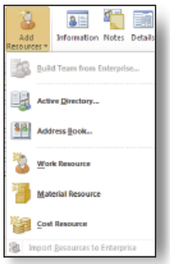
No project can be successful without resources, which is why Project gives you all the tools you need to effectively manage them. With tools like the Resource Sheet and Team Planner, you can be sure you always have the person or resource man for the job.

Adding Resources

First things first. Before you can assign tasks, you have to define what people and materials are available.

To add a resource:

1. On the View tab, in the Resource Views group, click **Resource Sheet**.

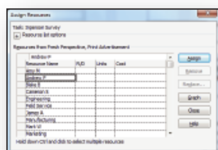


2. On the Resource tab, in the Insert group, click **Add Resources**.
3. Select to add a **Work Resource**, **Material Resource**, or **Cost Resource**. You can also choose to add work resources from an **Active Directory** or **Address Book**, and if you are connected to Project Server, you can choose **Build Team from Enterprise**.
4. In the Resource Name column, a new resource appears. Enter information for that resource.

Assigning Resources

After adding resources, assign them to tasks with a few simple clicks.

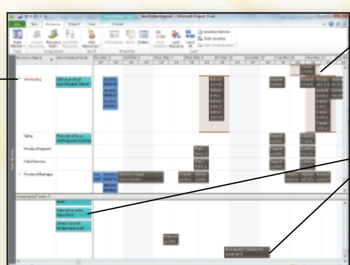
To assign a resource to a task:



1. In the Gantt chart view, select a task.
2. On the Resource tab, in the Assignments group, click **Assign Resources**.
3. In the Assign Resource dialog box, choose the resource or resources you want assigned to the task, and click **Assign**.

Using the Team Planner New

Microsoft Outlook® meets the Gantt chart with the Team Planner view in Project Professional 2010. You'll now find it easier than ever to add and assign resources. With drag-and-drop capabilities and resource overallocation alerts, you will always have the right mix of resources and assignments for your project.



ALL HANDS ON DECK: With the new Team Planner, you can more easily assign tasks to each member of your crew.

Using Inactive Tasks New

Project Professional 2010 steps it up with inactive tasks. Now instead of deleting tasks rendered obsolete, you can save them as a reference by making them inactive. Inactive tasks have no effect on the project plan and can be made active again if necessary.

To inactivate a task:

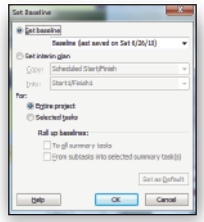
1. Select the task or tasks you want to inactivate.
2. On the Task tab, in the Tasks group, select **Inactivate**. The inactive task is dimmed and has a line through it.
3. To reactivate a task, select it again, and deselect **Inactivate**.

Tracking Progress

Have you ever been asked, "How's the project going?" Thanks to powerful tracking tools in Project 2010's, you can continulously monitor your project along the way so you never have to guess how it's going.

Saving a Baseline

Saving a baseline before you begin a project allows you to later compare actual data with your original projections.



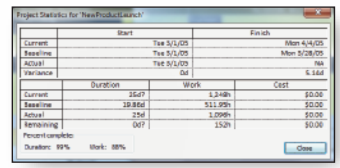
To save a baseline:

1. On the Project tab, in the Schedule group, click **Set Baseline**.
2. From the list, choose **Set Baseline**.
3. Under **For**, choose to set the baseline for the entire project or for selected tasks.
4. Click **OK**.

Analyzing Baseline Data

After setting baseline data, you can compare it with actual data to see if your project is in line with your goals.

To view baseline information:

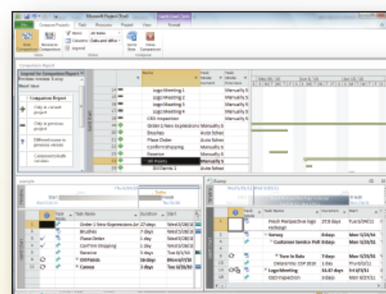


1. On the Project tab, in the Properties group, click **Project Information**.
2. Click **Statistics**.

To compare baseline and actual information:

1. On the View tab, in the Data group, click **Tables**, and then **Variance** to compare information in a sheet view.
   OR
2. On the View tab, in the Task Views group, click the **Gantt Chart** button arrow and then select **Tracking Gantt** to compare information graphically.

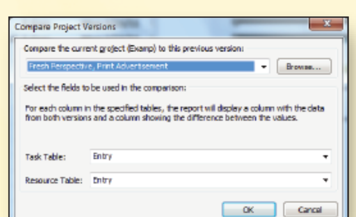
Comparing Projects



Comparing versions of your project has never been easier in Project. In addition to comparing earlier versions of the same project, you can also compare two different projects. And with the Compare Projects view, you see the compared projects side-by-side and represented in a list; and graphically in Gantt bar charts, helping you to readily evaluate similarities and differences.

To compare projects:

1. On the Project tab, in the Reports group, click **Compare Projects**.
2. In the Compare Project Versions dialog box, choose the project you want to compare the current project to. You can choose from among open projects or browse to another project on your computer.



3. For the Task Table and Resource Table lists, select the data you want to compare.
4. Click **OK**.
5. The Compare Projects view opens. To exit the view, on the Ribbon, select **Close Comparison**.
6. To keep the report for future reference, click **Save**.

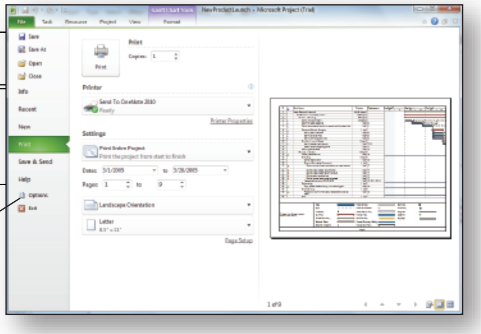
Using the File Tab

Clicking the **File** tab opens the new Backstage view, where all of your most frequent commands for managing your projects are close at hand in a dynamic new interface. No more dialog boxes–just the tools you need right where you need them.

Use fast commands to save, open, or close a project.

Open one of six tabs to find commands for managing your project.

Use Project Options to configure the user interface.

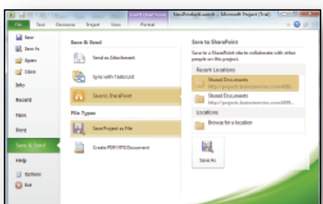


Publish Your Project to SharePoint® 2010

Step up the way you and your team members share and collaborate on your project. With Project Professional 2010 you can export project files directly to a SharePoint list, making it easier than ever to be connected with your team members. Not only can you share project status and create and share project reports, but with task lists you can receive automatically synchronized task updates from team members. Managing your projects has never been so seamless.

To publish your project to SharePoint:

1. Click **File** to open Backstage view.
2. On the **Save and Send** tab, select **Save to SharePoint**.
3. In the preview pane on the right side of the screen and browse to a location or select a location, from **Recent Locations**.
4. Click **Save As** and choose a format.



To sync a tasks list on SharePoint:

1. Click **File** to open Backstage view.
2. On the **Save and Send** tab, select **Sync with Tasks List**.
3. In the preview pane on the right side of the screen, check the web address in the Site URL field, and then click **Validate URL**.
4. Select an existing task list or enter a new one.
5. Click **Sync**.

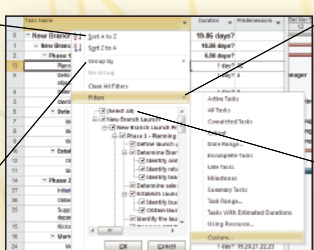
Using the AutoFilter

No more sorting through data to find the information you need. Every column in the task sheet has an AutoFilter drop-down list that allows you to easily sort through your project data. With the improved AutoFilter in Project 2010, you can quickly zero in on pertinent information with no fuss.

You can filter project data using one of four methods:

Sort: Arrange information in a field alphabetically, numerically, or chronologically.

Group by: Select to group information by an interval type specific to the field.



Filter: Sort data quickly based on the selected criteria.

Check boxes: Select which values to display by selecting or deselecting boxes.

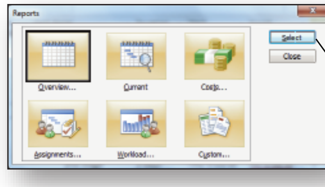
Pasting Tasks into Project 2010 New

Copy and Paste just got a face-lift. With Project Professional 2010, you can copy project data and paste it into another Microsoft Office program, with formatting in-tact. And better yet, you can take bulleted lists from other applications and paste them into Project while retaining the outline structure.

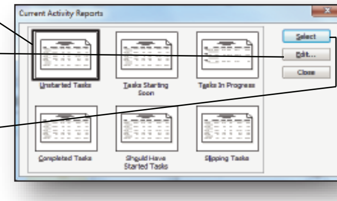
Creating a Report

Because reporting on your project is inevitable, why not make it easy on yourself? With the Reports feature, you can instantly create stunning reports to share the details of your project with clients, stakeholders, and team members–all without exerting much effort on your part.

To create a basic report:



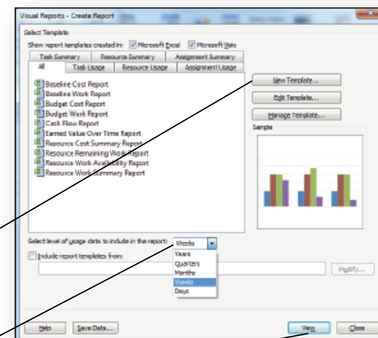
1. On the Project tab, in the Reports group, click **Reports**.
2. Choose the type of report you want to create, and click **Select**.
3. Choose a report from the list of predefined reports.
4. Click **Edit** to edit the details of the report. Once you have made your changes, click **OK**.
5. Click **Select** to print the report.



STAND AND REPORT: Instantly create reports that capture all the crucial details of your project and really stand out.

To create a visual report:

1. On the Project tab, in the Reports group, click **Visual Reports**.
2. From the list of available report templates, select the report you want to create, OR click **New Template** to create your own visual report template.
3. After selecting or creating your report, specify the level of usage data to include.
4. Click **View** to generate the report and open it in Excel or Visio®.



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