**25 Microsoft Project Tips and Tricks**

1. In the Gantt Chart, doubleclick on the right edge of a column header to "best fit" the column.
2. To quickly change the name of a column, doubleclick in the column header and enter a new name for the field in the Title field. For example, you may want to abbreviate the Duration field name to Dur to allow the field to be narrower.
3. To quickly change the field in a column, doubleclick in the column header and select the new field from the Field Name list. While in the Field Name list, press the first letter of the desired field to go to that field.
4. In the Gantt Chart Table (or any table), to quickly hide a column, click on the right edge of the column header and drag it to the left until it disappears (becomes a 0 width column). To display this hidden column, place the cursor a little to the right of the column separator bar where the column used to be, click and drag to the right.
5. You can wrap text in the Gantt Chart to display text on multiple lines if you increase the row height. To increase the row height, place the cursor between any two row numbers (if the ID field is displayed in the first column and is "locked"), click and drag down to increase the row height. Only Text fields wrap and only if the column is narrower than the text in the field.
6. When printing Gantt Charts (or other timescaled charts) you can adjust the width of the timescale to fit the page without changing the timescale units. Doubleclick on the Timescale and increase the number in the % field (or Enlarge field in some versions of Project) to make the timescale take up more of the page or decrease the number in the % (or Enlarge) field to make the timescale narrower. The latter step is useful when a chart is just a little too wide to fit on a page.
7. To select two or more non-adjacent tasks, click on a task (in the table area), hold down the Ctrl Key and click on another task in the chart. Continue holding the Ctrl key to select other tasks. This is especially useful for linking or unlinking tasks that are not on consecutive rows.
8. To change information for a number of tasks at once, highlight the desired tasks (select non-adjacent tasks using the method described above) and select the Task Information button. Enter the common information in one of the fields displayed in the "Multiple Task Information" dialog box.
9. To remove a date constraint from a task, select the task (or multiple tasks) and select the Task Information button. Click in the Advanced tab, change the Type field to As Soon As Possible and click OK. This removes any date constraint in the task and allows it to be scheduled based on the dependencies rather than a date entered (perhaps accidentally) by a user.
10. If a task does not move (reschedule) based on a dependency, it may contain a "fixed" date of some kind. A fixed date could be an Actual Start or a constraint such as Must Start On or Start No Earlier Than. Use the Tasks with Fixed Dates Filter to view only those tasks in a plan that contain fixed dates. You can then determine if these tasks should have these types of fixed dates. Use the previous tip to remove an unwanted constraint.
11. If after removing the Actual Start and any constraint (such as Must Start On or Start No Earlier Than) a task still does not reschedule based on a dependency, check the Resource Leveling feature. Make sure Automatic Leveling is turned off by selecting Resource Leveling from the Tools menu and choosing Manual. If a task still does not move, it may contain a delay based on a previous Resource Level. Select Resource Leveling again from the Tools menu and choose Clear Leveling. Select whether or not to remove Leveling from the selected tasks or for the entire project.
12. After applying a Filter in a Gantt chart press F3 to view all tasks again instead of applying the All Tasks filter.
13. Press Alt-Home in the Gantt chart to position the chart on the start of the project.
14. If you have indented tasks to create Summary Tasks and Detail Tasks, click the little box with the minus sign to the left of the Summary Task name to quickly hide the detail tasks below it. Click the box with the plus sign to display the detail tasks that were hidden.
15. In the Gantt chart, you can create dependencies by clicking on the Gantt bar of a task and dragging to another Gantt bar to create a Finish-to-Start dependency between the two tasks.
16. To quickly modify or delete a dependency, doubleclick on the dependency line between the two tasks to display the Task Dependency form (be sure to place your cursor directly on the dependency line).
17. In any drop down list such as the list of Resource Names or the list of Filters you can press the first letter of the item you are looking for to quickly go that item.
18. Use the Insert key on your keyboard to quickly insert rows and columns. In the Gantt chart, click on a row and press the Insert key to insert a blank row above the selected row. Click on a column header to highlight a column and press Insert to insert a column to the left of the selected column. You can also use the Delete key to reverse this process but be careful…
19. In the Network Diagram (or PERT Chart in some versions of Project), to move multiple task boxes, click in the chart area, drag the cursor to select any number of boxes and release the cursor. Then, click on the border of a box and drag the entire selection of boxes to a new location. In Project 2000, 2002 and 2003 you must first select the Format menu, Layout and then Manual Box Positioning to enable the ability to move task boxes around.
20. An often overlooked but handy report is the Calendar view using a Resource Filter. Select Calendar from the View menu. Select the Using Resource… Filter and type in the name of the desired resource to display the Calendar for a particular resource. This produces a nice printout of a resource’s tasks with each month of a project on a separate page.
21. For Project 2000, 2002 and 2003, to prevent an item from appearing in the legend for the Gantt  chart, select the Format menu, Bar Styles and place an asterisk (\*) before the name of the item that you do not want to appear. In Project 98 you can delete the bar styles you do not use to avoid displaying them in the legend.
22. Right click in the Toolbar area to display the list of available Toolbars. A check next to a Toolbar indicates that it is currently displayed. Click on a Toolbar to display or hide it.
23. In the Gantt Chart (or any chart with a table and a chart area) doubleclick the separator line between the table and chart to automatically push the separator line to the closest column edge.
24. To split the screen and place a specific View into the lower pane, hold the shift key while selecting an item from the View menu. You can also split the screen by selecting Split from the Window menu or doubleclick the small horizontal split bar in the lower right corner of the screen. Doubleclick it again to remove the split (or choose Remove Split from the Windows menu).
25. Just for fun - Create two 10 day tasks. Place the cursor in the Finish field of the first task and click the Copy button. Place the cursor in the Start field of the second task and select Paste Special-Paste Link from the Edit menu. Place the cursor on the Finish field of the second task and click the Copy button. Place the cursor on the Start field of the first task, select Paste Special-Paste Link and watch the tasks "walk" across the chart. Delete one of the tasks to stop.

# Ask the Experts: 15 Microsoft Project Tips for New Users

Written on May 23, 2011 by [Ellen Lehnert](http://www.mpug.com/author/ellen-lehnert/)

[1](https://www.facebook.com/sharer/sharer.php?u=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/)[2](https://plus.google.com/share?url=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/)[0](https://twitter.com/intent/tweet?url=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/&text=Ask%20the%20Experts:%2015%20Microsoft%20Project%20Tips%20for%20New%20Users)[2](https://www.linkedin.com/shareArticle?mini=true&url=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/)[0](https://pinterest.com/pin/create/button/?url=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/&media=)[2](http://www.reddit.com/submit?title=Ask%20the%20Experts:%2015%20Microsoft%20Project%20Tips%20for%20New%20Users&url=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/)[3](mailto:?subject=Ask%20the%20Experts:%2015%20Microsoft%20Project%20Tips%20for%20New%20Users&body=http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/)

**Steve in Phoenix, AZ asks:** Do you have any tips and tricks to help new users with Microsoft Project?

**Ellen answers:** Using Project can become a tricky endeavor at times. Knowing some of the tricks and hidden functions can save time and effort for users. Below I have listed some of my favorite tips and tricks for both Project 2010 and Project 2007 that can help you when you’re working with the Standard or Professional versions of the product.

### 1**. Here are four helpful keystrokes to remember:**

* F3 will remove a filter.
* The Ins key will insert blank lines.
* The Del key will delete task lines.
* Deleting a Summary task will delete all detail tasks within the Summary task.

### 2. When dragging tasks around to change location, always move tasks from the ID number on the left of the views.

### 3. When a start date is changed, the constraints and deadlines within the project schedule don’t adjust to the new start date.

In Project 2010 use the Move Project button on the Project ribbon to change the start date. The option to adjust the deadlines is available. The ability to adjust deadlines isn’t available in the earlier versions of Project, but there’s a button called Adjust Dates located on the Analysis toolbar that lets you adjust the constraints to the new project start date. To remove constraints, double click on a task, click on the Advanced tab, and reset the Constraint type to As soon as possible.

### 4. Change Working Time allows for changing and creating calendars.

Think of this function as a way of accessing the calendars that are available to be used within the project. The calendars aren’t active until they’re assigned to a resource, to the project, or to a task. They can be copied using the Organizer into the Global.mpt for use in other projects.

### 5. When an alternate calendar is selected for the project calendar, the views will continue to display the Standard calendar.

To change the views to show the alternate calendar being used as the project calendar, expose a view (such as the Gantt Chart), right click in the view (right side), select non-working time, and change the calendar being shown. This change is unique per view and will need to be changed in all Gantt chart and Usage views used. You can also use this change to see a Gantt chart for an individual resource.

### 6. When time is a physical number of days and not working days, use elapsed time.

A 10-day duration entered “10d” will be scheduled on working days only. A task duration entered as “10 ed” will change to physical time and will include non-working time.

### 7. The percent complete you see on the Tracking Gantt and on the Tracking percentage buttons is percent duration complete.

There’s a second percent complete called percent work complete. When you mark a task 100 percent complete, it’s assumed that 100 percent of the work has been completed also and the Start and Finish dates will become Actual Start and Actual Finish for the task. Look at the Work table of the Gantt chart to see Work completed.

### 8. The best view to see slippage between baseline vs. actual work is the Detail Gantt view.

### 9. To combine projects on a temporary basis for reporting and linking tasks between projects, create a new window.

Open the files to be combined. There’s a New Window button on the View ribbon in Project 2010. In earlier versions click on Window | New Window. Select the files to combine and a temporary file will be opened using the standard default template with the selected files combined. Create links across the projects or filter and group for reports. Save the files changed, but don’t save the temporary file.

### 10. Right clicking is a way of getting to a lot of options.

You can get feature selection menus by right clicking on the Ribbon or toolbars, the timescale, in the Gantt chart, on a task, on a resource, on column titles, etc. Some options are only available from menus accessed through right clicking.

### 11. The best way to see everything that is going on when creating an assignment is to create an assignment from a split screen with the Gantt chart or Task Sheet above and the Task Form with the View Work or Resource Work.

This is also known as the Task Entry View. Double click on the little bar in the lower right corner of the Gantt chart view. The Task Form will appear and can be changed to show the Work, Cost, and Schedule information. Double click on the Resource Name to see the Resource data.

### 12. When printing Gantt charts, set up the view to the way you want to see it printed before you click Print Preview or File | Print in Project 2010.

Then go into the Print Setup settings and turn off the legend and adjust the settings.

### 13. When creating a work breakdown structure (WBS), indent from the top down.

When removing an indentation, work from the bottom up and outdent.

### 14. To alter a relationship type, add lead or lag time, and delete a relationship, double click on the link line between tasks.

### 15. A helpful formatting to add to the Tracking Gantt is the Status date line.

To add this line, right click in the Gantt chart, click on Gridlines. Select Status Date on the left, select a line style and color, and click OK to close the box. The Status date will be shown when it’s entered in the Project Information box in Project 2007 or by entering the Status date using the Status date button on the Project ribbon bar in Project 2010.

**Tags:** [2010](http://www.mpug.com/tag/2010/), [Bar Styles](http://www.mpug.com/tag/bar-styles/), [Control](http://www.mpug.com/tag/control/), [Customization](http://www.mpug.com/tag/customization/), [Desktop](http://www.mpug.com/tag/desktop/), [elapsed time](http://www.mpug.com/tag/elapsed-time/), [Executing](http://www.mpug.com/tag/executing/), [experts](http://www.mpug.com/tag/experts/), [gantt chart](http://www.mpug.com/tag/gantt-chart/), [gantt chart view](http://www.mpug.com/tag/gantt-chart-view/), [Microsoft Project](http://www.mpug.com/tag/microsoft-project/), [Planning](http://www.mpug.com/tag/planning-2/), [questions](http://www.mpug.com/tag/questions/), [scheduling](http://www.mpug.com/tag/scheduling-2/), [tips and tricks](http://www.mpug.com/tag/tips-and-tricks/), [WBS](http://www.mpug.com/tag/wbs/)