

25 Microsoft Project Tips and Tricks

The following is a collection of Tips and Tricks for Microsoft Project that we have accumulated over the years and teach in our training classes. Unless otherwise noted, these tips and tricks work with all versions of Microsoft Project.

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.