



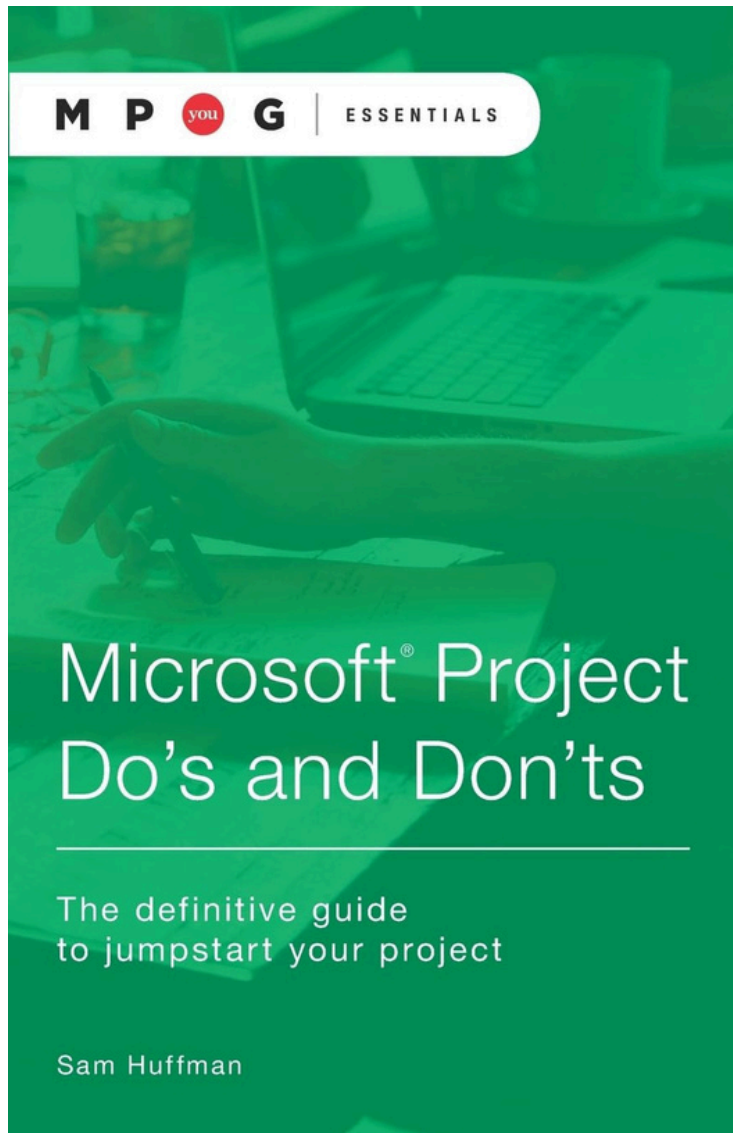
MICROSOFT PROJECT SPEED GUIDE

10 Essential Time-Savers

MPUG

10 Essential Time-Savers for Microsoft Project

Proven techniques from MPUG's popular guide: "Microsoft Project Do's and Don'ts"



In the next few pages, you'll discover:

- Time-saving techniques used by Project experts
- Shortcuts that eliminate hours of manual work
- Pro tips that prevent common mistakes
- Visual guides for instant implementation

*Adapted from the comprehensive guide by Sam Huffman, PMP
Microsoft Project expert and certified Project Management
Professional with contribution by Microsoft MVP, Erik van Hurck.*

Each tip includes:

- Clear visual examples
- Step-by-step instructions
- Pro tips from experts
- Common mistakes to avoid

01 Quick Access Toolbar Optimization

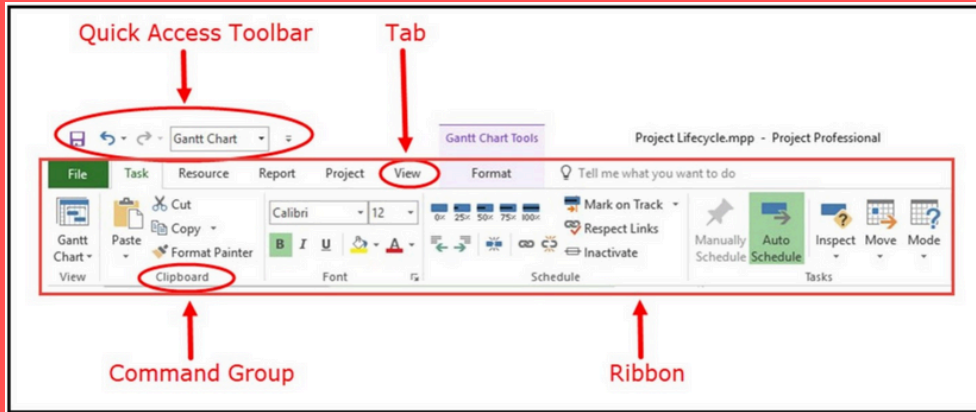


Figure 1.1: The Quick Access Toolbar location

Pro Tip

Add these essential commands first:

- View list (for instant view switching)
- Tables button (for quick table changes)
- Tracking tools you use daily

Common Mistakes

- Overcrowding with rarely-used commands
- Forgetting to remove outdated commands
- Not arranging by frequency of use

What It Is:

Your personal command center for frequently-used features, located at the top left of your screen.

Why It Matters:

Save 30+ clicks per day by putting your most-used commands one click away.

Step-by-Step:

1. Right-click any command in the ribbon
2. Choose "Add to Quick Access Toolbar"
3. Use dropdown arrow to customize further

02 Smart View Combinations

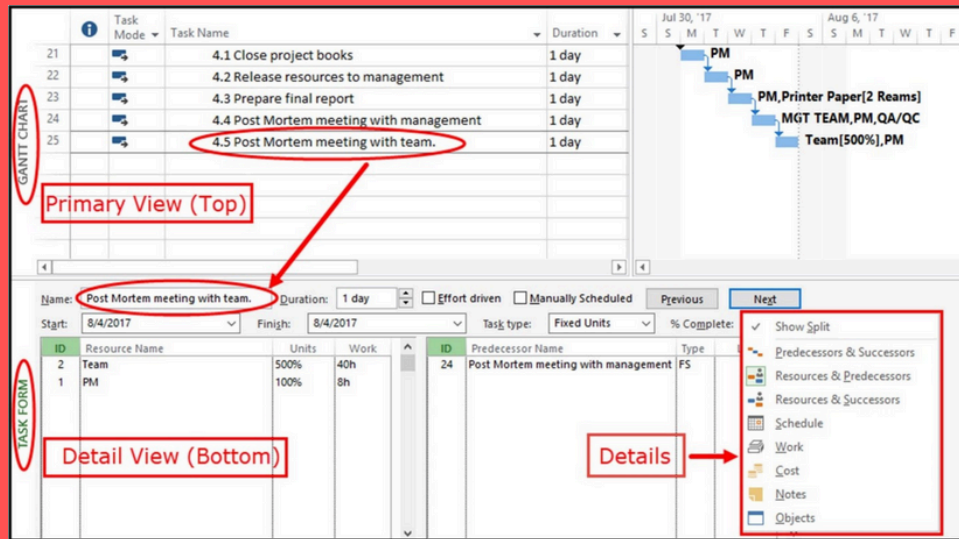


Figure 1.7: The Task Entry View



Pro Tips

- Use Task Details Form to access advanced settings like Priority and Task Type
- Keep Gantt chart on top for visual timeline reference
- Compare current, baseline, and actual dates in one view
- Access WBS codes and scheduling methods quickly



Common Mistakes

- Not utilizing the Task Details Form's advanced features
- Using basic Task Form when more detail is needed
- Missing critical scheduling parameters by using single views only
- Not exploring all available form options

What It Is:

A split-screen view that shows your Gantt chart and detailed task information simultaneously.

Why It Matters:

Cut task update time in half by seeing and editing all task details – from basic dates to advanced scheduling parameters – without switching views.

Step-by-Step:

1. Select View tab
2. Check "Details" checkbox
3. Right-click bottom pane
4. Choose "Task Details Form"

03 Instant View Switching

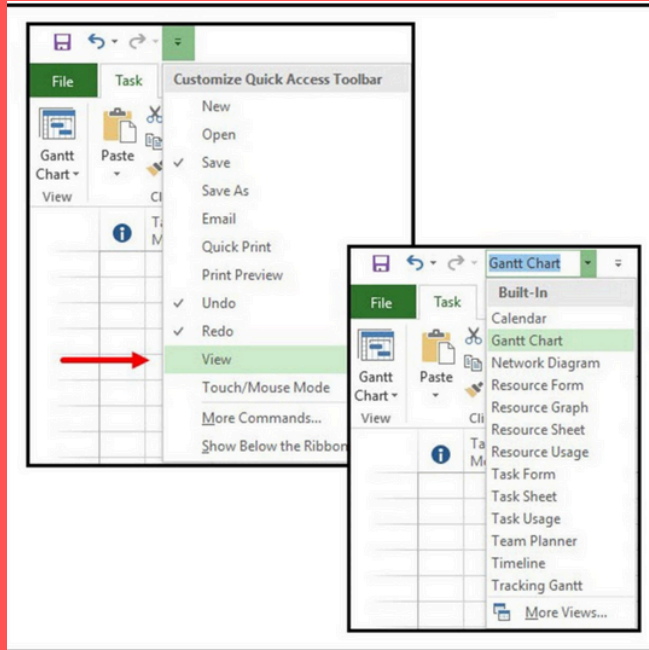


Figure 1.5: Customizing Quick Access to show views.

💡 Pro Tips

- Add both Views and Tables buttons for complete control
- Arrange most-used views at the top of your list
- Use 'More Views...' for less common but important views

⚠️ Common Mistakes

- Hunting through ribbons to change views
- Not customizing your view list
- Missing opportunities to use specialized views

What It Is:

One-click access to any view in Microsoft Project, available from anywhere in the interface.

Why It Matters:

Stop wasting time searching through ribbons and menus - switch between views instantly.

Step-by-Step:

1. Click Quick Access Toolbar dropdown
2. Select "View" from the list
3. Click "Add" to make views always available

04 Rapid Task Entry & Organization

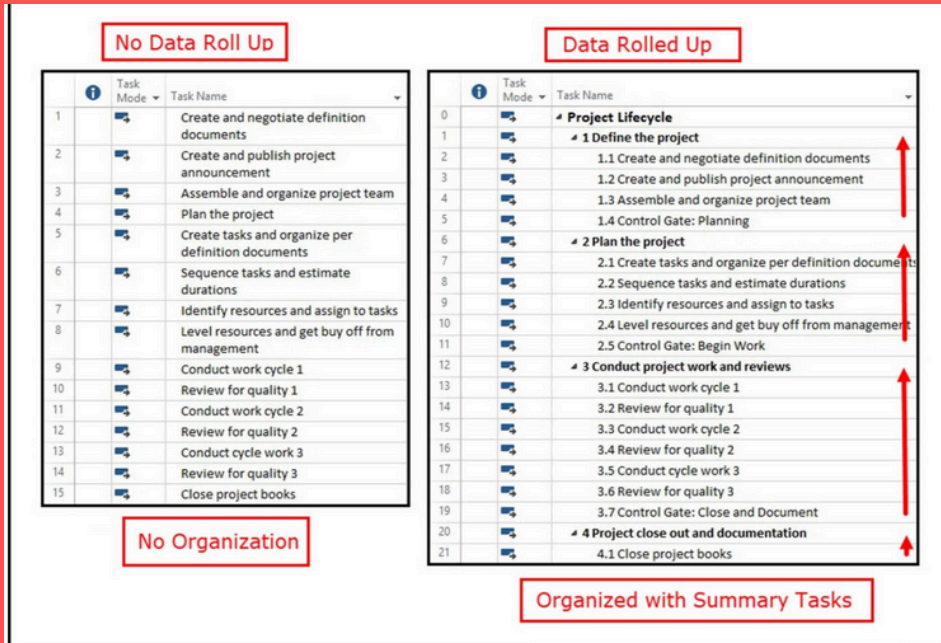


Figure 3.2: Organizing tasks through outlining.



Pro Tips

- Turn on outlining tools before entering any task data
- Watch your insertion points carefully
- Use consistent task levels for better reporting



Common Mistakes

- Starting data entry without outlining tools on
- Mixing outline levels inconsistently
- Trying to organize tasks after they're all entered

What It Is:

The Work Breakdown Structure (WBS) is a systematic approach to entering and organizing tasks that maintains perfect project structure.

Why It Matters:

Save hours of reorganization time by getting your task structure right from the start.

Step-by-Step:

1. Go to Format tab
2. Check "Project Summary Task" box
3. Check "Summary Tasks" box
4. Enter tasks using indent/outdent for organization

05 Quick Project Health Checks

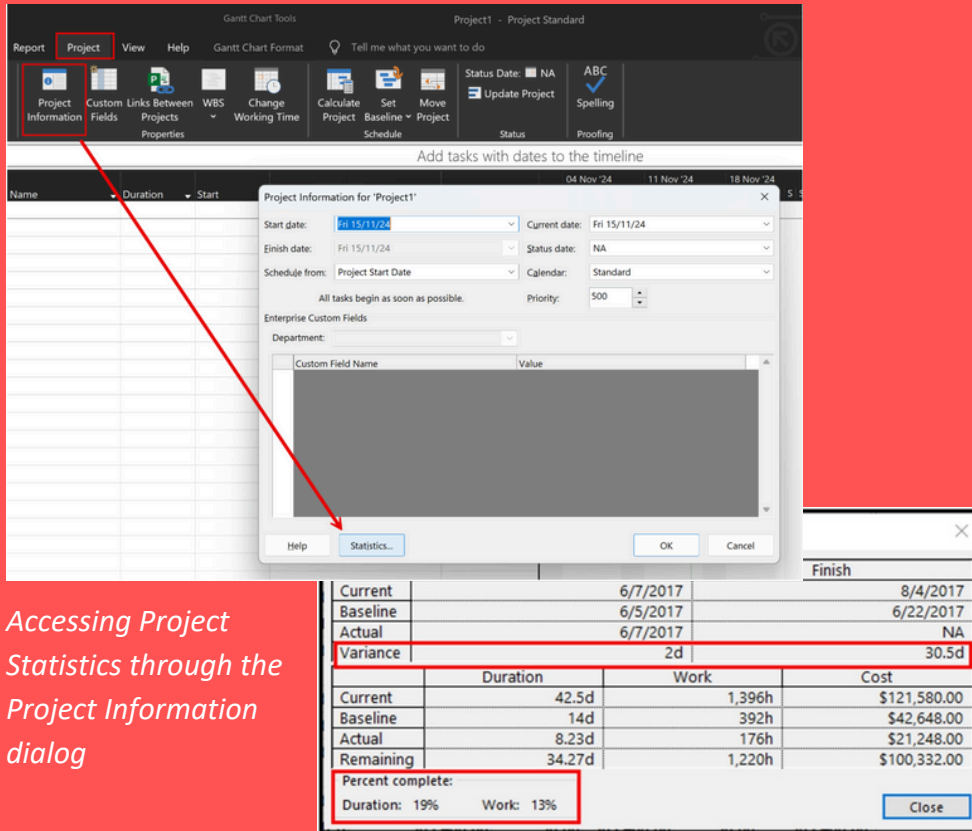


Figure 7.12: Project Statistics Showing Variances

Pro Tips

- Check statistics before every status meeting
- Watch for growing variances in red
- Use this for quick executive updates

Common Mistakes

- Waiting for problems to become visible
- Not checking variances regularly
- Missing early warning signs

What It Is:

A one-click snapshot of your project's schedule, work, and cost performance. Works best with a baseline.

Why It Matters:

Instantly know if your project is on track without digging through multiple views.

Step-by-Step:

1. Click Project Information button (Project tab)
2. Click Project Statistics button
3. Review Start, Finish, and Duration variances

06 Fast Resource Analysis

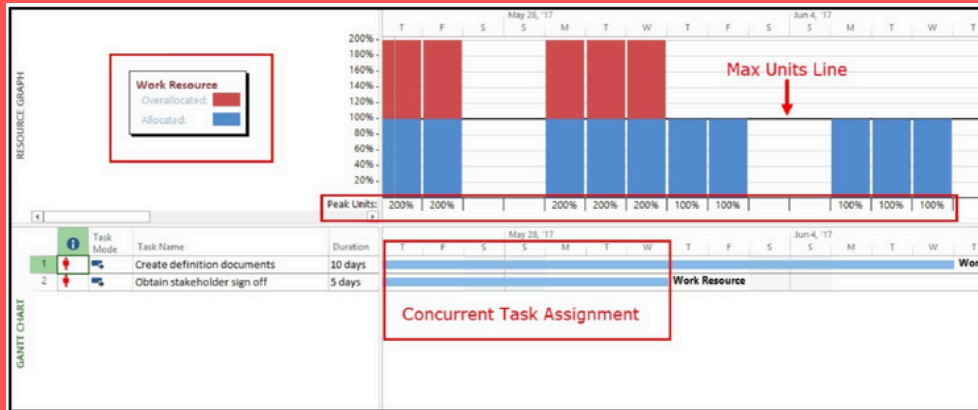


Figure 6.11: Fast Resource Graph over Gantt showing concurrent tasks causing an overallocation.

Pro Tips

- Use split screen to see overallocations and their causing tasks simultaneously
- Red peaks show exactly when resources are overloaded
- Double-click overallocated periods to see conflicting tasks

Common Mistakes

- Looking at tasks without checking the resource graph
- Missing overallocations by not using the split view
- Assigning resources without checking their existing workload

What It Is:

A visual way to spot and fix resource conflicts using Project's split-screen view.

Why It Matters:

Catch resource problems instantly with a clear visual representation of workload.

Step-by-Step:

1. Select View tab
2. Choose Resource Graph
3. Look for red peaks above your resource's max units
4. Split the screen to see related tasks

07 Speed Tracking Shortcuts

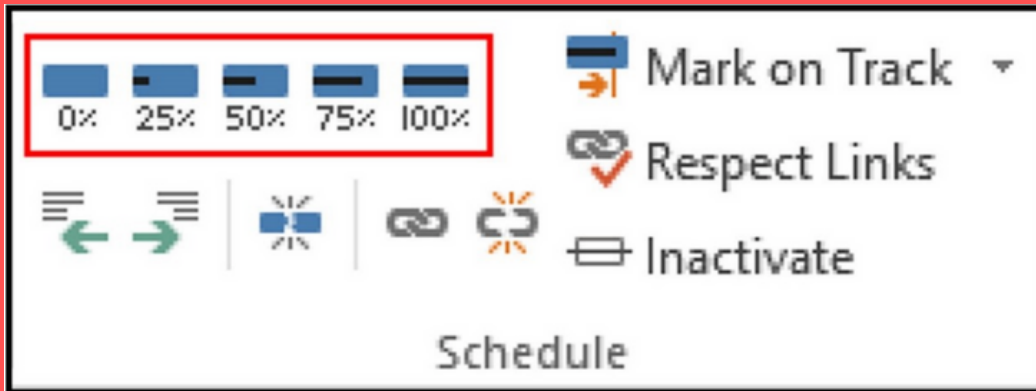


Figure 8.5: The tracking buttons set schedule and work completion to the same percentage.

💡 Pro Tips

- Use 0%, 25%, 50%, 75%, 100% for quick status meetings
- Update multiple tasks at once by selecting them first
- Always check actual start dates for accurate tracking

⚠️ Common Mistakes

- Tracking into the future
- Not checking start dates on early tasks
- Over-complicating simple updates

What It Is:

One-click task progress updates using Project's built-in tracking shortcuts.

Why It Matters:

Update project status in seconds during team meetings instead of spending hours on detailed updates.

Step-by-Step:

1. Select task(s) to update
2. Click appropriate % complete button
3. Verify actual start dates for started tasks
4. Use 100% for completed tasks

08 Timeline View Mastery

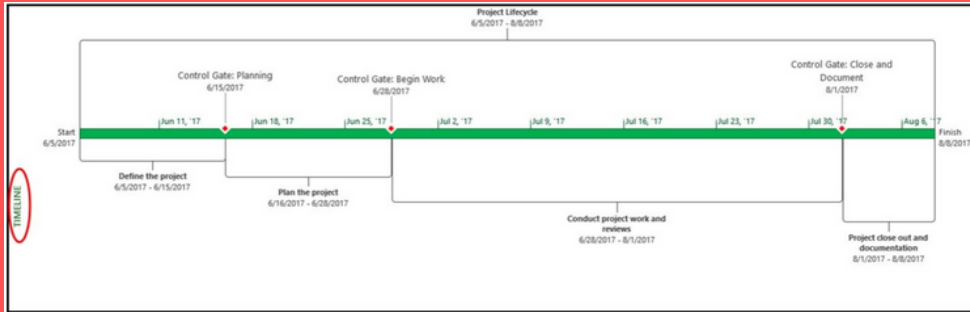


Figure 1.19: The Project Timeline showing the project phases, control gates and dates.



Pro Tips

- Create multiple timelines to separate phases and milestones
- Customize timeline styles for different audiences
- Copy timeline directly to PowerPoint for instant presentations



Common Mistakes

- Overcrowding a single timeline
- Not separating phases visually
- Missing the copy/paste to presentation feature

What It Is:

A visual project overview that can be instantly shared with executives and stakeholders.

Why It Matters:

Create executive-ready visuals in seconds instead of spending hours building presentation slides.

Step-by-Step:

1. Select View tab
2. Check "Timeline" in Split View group
3. Add key tasks and milestones
4. Format for clarity
5. Copy to PowerPoint or email with one click

09 Quick Calendar Updates

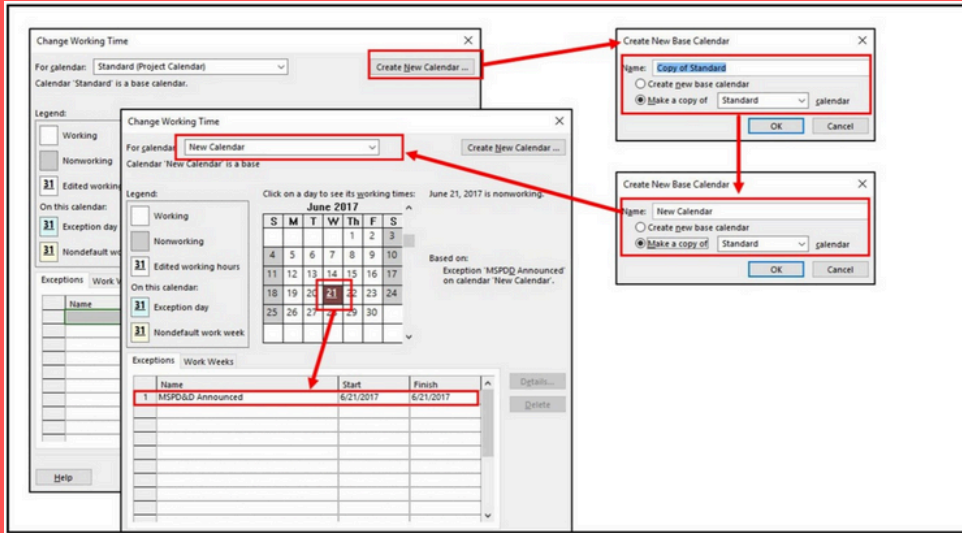


Figure 2.5: Create a new calendar and any working date exceptions in the Change Working Time dialog.

Pro Tips

- Create calendar templates for common schedules
- Use the Organizer to copy calendars between projects
- Set exceptions for holidays and special events in bulk

Common Mistakes

- Recreating calendars for every project
- Forgetting to add company holidays
- Not using calendar templates

What It Is:

A systematic way to handle calendar updates and exceptions across all your projects.

Why It Matters:

Stop wasting time recreating calendars - set up once and reuse forever.

Step-by-Step:

1. Select Project tab → Change Working Time
2. Create or modify calendar exceptions
3. Use Organizer to copy to other projects
4. Apply to new projects as needed

10 Rapid Project Reporting

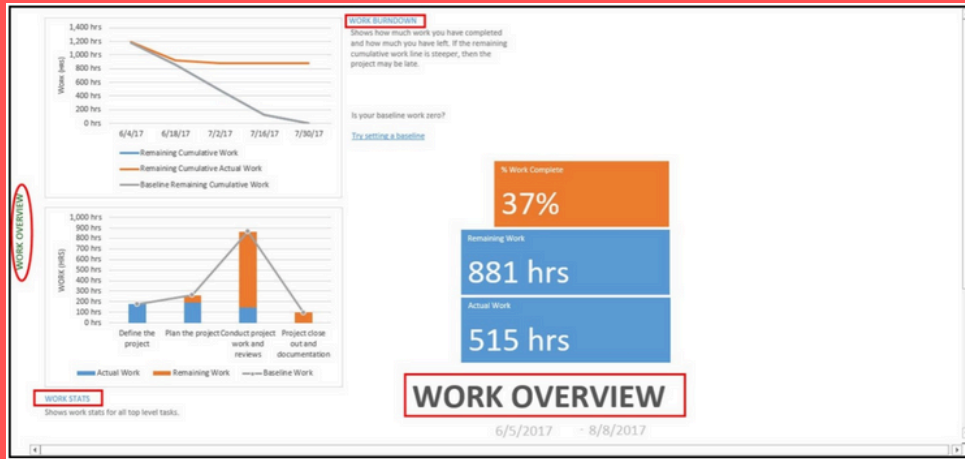


Figure 9.2: The Work Overview dashboard Work Burndown and Work Stats charts.

Pro Tips

- Customize dashboard favorites for quick access
- Save custom reports for reuse
- Use visual reports for executive updates

Common Mistakes

- Building reports from scratch each time
- Not saving custom report layouts
- Missing built-in dashboard features

What It Is:

Pre-built professional dashboards that give instant project insights.

Why It Matters:

Create stakeholder-ready reports in minutes instead of hours of manual reporting.

Step-by-Step:

1. Select Report tab
2. Choose Dashboards
3. Pick Work Overview (or other)
4. Customize as needed

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