

## How to set up Microsoft Project Files

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Explaining the proper use of project management scheduling software

This document was created as a cheat-sheet for properly setting up a Microsoft Project schedule. The steps and cautions included in this document are kept at a high-level, so that these best practices apply to versions of the software from 4.x to 2002. In fact, most of these suggestions apply to most of the other project management software available.

For a much more thorough step-by-step explanation of not just setting up, but also efficiently using Microsoft Project, I highly recommend **Teach Yourself Microsoft Project 2000** published in 2000 by IDG Books (now named “Hungry Minds”), written by Synergest’s own Vicky Quinn. This book includes screenshots on every page, and clearly written instructions on how to set up, plan, optimize, track, and manage a project using Microsoft Project. The book is readily available from the Synergest website on our Store page.

## 20 Steps to Schedule Bliss

(Or at least avoiding the most common headaches caused by improper set up)

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Each of these steps is explained on the following pages.

## Define the project

This step takes place outside of Microsoft Project. Remember that the goal and scope of the project must be defined in quantifiable and measurable terms.

## File / Properties

Within Microsoft Project, go to the **File** menu and select menu option **Properties**. Fill in whatever information you think is appropriate. Keep in mind that this file information can be used later to locate this file, should you forget the filename or its location (read up on Window's "Find" feature).

## Project / Project Information

Set the date the project is to start. Leave **Schedule from** as "Project Start Date."

## Tools / Options

- View** tab - turn on (by putting an X in the box) **Project Summary Task**
- General** tab - turn off (remove the X) **Automatically add new resources**
  - put at least \$1 in the resource cost fields
- Schedule** tab - set **Default Task Type** to "Fixed Duration"
  - set **New Tasks are Effort Driven** to off (remove the X)

Remember that the Default Task Type and the Effort Driven settings help you, the user, control how the tasks are initially set up, with regard to duration and resource assignment. Correcting these settings prevents Microsoft Project from "helping" you by adjusting one while you adjust the other...in effect fighting with you.

## Change working time

From the **Tools** menu, select the **Change Working Time** option. Enter whatever holidays and non-working times are appropriate. Remember that this step must happen before tasks are entered. Always click on a different date after making a change, to ensure the change was accepted.

## Enter major deliverables – WBS

From the Gantt view (the default data-entry screen), enter the major tangible deliverables for the project. Focus initially on those main elements of the project that can be recognized even by those who might not be familiar with the technical aspects of the project. These line items are known as summary tasks or Level Ones.

## Enter detail tasks

Remembering the 5-Ones of detail tasks, enter appropriate detail tasks for each of the summary tasks. These Level Two line items should be broken down into enough detail to facilitate estimates, resource assignment, and tracking. Remember that you can use the pointing-right arrow icon on the toolbar to indent, and the pointing-left green arrow on the toolbar to outdent. Keyboard shortcuts are ALT-SHIFT-RightArrow and ALT-SHIFT-LeftArrow.

## Re-order outline

Using Cut, Copy, and/or Paste, or just selecting then using the mouse to click and drag, arrange the tasks in an order (sequence) that seems to make sense. Do not worry yet about specific sequences. For example, if re-ordering a house project schedule, the “Foundation” section of the project probably should go before the “Walls” and “Roof” section of the project.

## Enter durations

Go to each detail task (Level 2) and enter the durations in the appropriate cell. Note that the summary tasks might not summarize the numbers properly yet. This will be fixed after the next step.

## Set dependencies

Select the task that comes first, and then select the task that follows after it. Using the Link icon on the toolbar (it looks like three links in a chain), you can set the dependency sequence of these tasks. If you wish to set a series of tasks to one-after-the-other, select them all and then click on the Link icon.

## Define Resource Sheet

Go to the **View** menu, and select the **Resource Sheet** option. Enter the resource names, percent maximum project availability, and costs. Remember that a resource is anything that helps you finish a task, so it can be a person, machine, money, permit, etc.

## Assign resources

Go to the **View** menu, and select the **Gantt Chart** option. Select a task you wish to assign a resource to, and then click on the Two-Faces icon on the toolbar. This Assign Resources icon will pop up a dialog box from which you can assign the necessary resources. Once this dialog is open, you can leave this dialog visible and select a different task, repeating the assignment process.

## Look for over-assignments

Using any of the features built-in to Microsoft Project to assist in locating over-assignments, find all over-assignments throughout the schedule. Some of the features to check out for this are Filters, Highlights, the “Resource Overallocated” column, and the Resource Sheet View.

## Fix over-assignments

After you identify all of the over-assignments (as best you can tell), begin fixing them. The usual options are: decrease assignment and add another resource, swap to a different resource, change dependencies, adjust scope by removing tasks. Of course, the appropriate action is dependent on the project constraints.

## Analyze critical path

Microsoft Project has several built-in features that can help you identify the Critical Path. Check into Filters, Highlights, and several of the Formatting options. Remember that the Critical Path is made up of those tasks that directly control the end date of the project.

## Feasibility / flexibility

Once you have a sense of the Critical Path, determine where and how you might put flexibility into the schedule. Remember that flexibility does not just apply to time. Double-check the schedule to make sure that you feel it is feasible, and not overly optimistic.

## Formal risk management

Scanning throughout the schedule perform the basic elements of risk management: identify risk, quantify risk, develop responses to those risks, and integrate those responses into the project schedule.

## Optimize

There is a tight cycle of feasibility, flexibility, and risk management, during which you can also look for ways to optimize the schedule. By making subtle adjustments to the tasks, assignments, durations, and dependencies, sometimes the schedule can be made more solid, and even with an earlier project completion date.

## Set baseline

Once the schedule has been fine-tuned to the best of your ability (or you just run out of time to work on it), set the project schedule baseline by using the **Tools** menu, **Tracking** menu option, then select **Save Baseline**.

## Next Steps

This short document cannot hope to cover everything that a Microsoft Project user needs to know about the software, however we hope this document helped to briefly summarize the proper set up of Microsoft Project.

This document certainly does not replace formal training on project management software. Consider contacting Synergest, Inc. for a free consultation about what it would take to get you or your organization up-to-speed in the proper use of project management software and techniques.

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