

Best Practices: Getting Started

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Best Practices: Getting Started

Before you create a new project plan within Microsoft Project, consider taking a small amount of time to get the basic building blocks of your project in place, in other words; work out 'how to plan the planning of your plan'. Whilst this may seem trivial to some, a small investment of your effort at this stage may save you much more effort and potential replanning later on.

Below you'll find a handful of best-practice tips and tricks, gained over many years of experience in working with people who plan real-world projects using Microsoft Project as their project management tool of choice.

1 Use a template if you can

When you create a new project, firstly try to find if there are any project templates available to help you. You can create your own templates, or you can use ones created for you by a Project Office if your organisation has one. Key project components that you'll find within templates comprise: Calendars; Views & Tables; Filters & Groups; Custom Fields and (optionally) Tasks. If these fundamental building blocks are already in place, you can concentrate on defining the tasks and resources that plan the work that you'll need to manage.

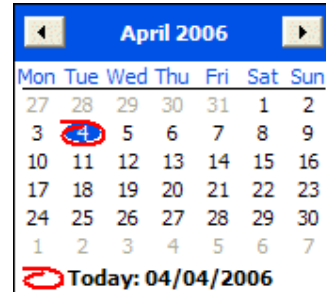
2 Set general project properties

If you don't have a viable template, then just choose New from the File menu, or click on the New button on the Standard Toolbar. Now within this new (blank) project, you can either follow the step-by-step instructions provided by the Project Guide that is displayed in a Task Pane to the left of the screen, or you can use the menu options directly. As you may want to change important settings in the future, without having to use the Project Guide, the following tips are all menu-based.

Firstly, you'll need to choose a Project Start Date, or a Project Finish Date. You'll find these date settings within the Project Information dialog box, which you can access from the Project menu. Do note that when you enter dates, the date control (which looks like a month's calendar) has some valuable shortcuts:

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- a. The first and most obvious of these is to click on the red swirl icon if you want to choose today's date.
- b. Less obvious is to click on the displayed year to choose a particular year, or to click on the displayed month, and then use a drop down list for your chosen month.



You may also be pleased to know that these shortcuts also work within lots of other Microsoft Office applications as well.

Now would be a good time to save your project to disk. A good idea is to use a filename that is clearly recognisable. To help you search for projects on your server, define a Title and Subject for your project, which you'll find by selecting Properties from the File menu.

3 Establish working and nonworking time

The next thing you need to define is working and nonworking time. This can be set by choosing Change Working Time from the Tools menu. If you haven't used a template, it's most likely that Monday to Friday will have 2 4-hour shifts; 0800-1200 and 1300-1700 a total of 8 hours (or in Microsoft Project terms, 480 minutes). If you want to change the working time for a specific day, just click on the day and then enter appropriate From and To times. Select the day heading (M, T W and so on) to change working times for every Monday/Tuesday/ Wednesday. Do bear in mind here that many project managers try to be unnecessarily accurate; if you only update a project once a week, do you really need a working day that begins at 0845 and finishes at 16:35? Whatever working time pattern you choose, Microsoft Project will schedule it for you; down to the nearest minute.

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4 Match your working time with your standard project day

Once you've defined the project's calendar, DON'T FORGET to check on the standard Hours per day and Hours per week for your project. This bit may appear trivial, but getting this wrong catches out more Microsoft Project users than you may think. If you've seen duration values expressed as "1.14days" or one-day tasks spanning 2 days, then this next bit may well be for you. Just click on the OPTIONS button within the Change Working Time dialog, or choose Options from the Tools menu and then select the Calendar tab.

If the shift pattern within the project's calendar defines supply for time, the calendar options determine demand. When you create a task or an assignment, Microsoft Project takes the duration value that you enter and converts it to minutes, which is then scheduled according to the base calendar's shift pattern. If demand and supply don't match, then tasks may finish earlier or later than expected, or they may have durations in decimals of days. The good news is that this potential problem is easy to fix. Here are two options:

- a. Always create projects from templates; as both shift patterns and calendar options are inherited from templates.
- b. Use the SET AS DEFAULT button to save standard start and end times to your hard disk's Registry and therefore be the default for all newly-created projects. Ideally, you'll want to copy your 'Standard' project calendar to your Global Microsoft Project Template, and hence make this available to all new projects as well. You can do this (with care) by choosing Organiser from the Tools menu.

Next steps: You should now look to define your resource pool and then create some tasks for your resources to work on.