Creating a New Plan
Illustrated Beginners Guide

MS Project
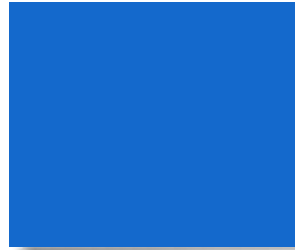
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Creating a project plan in MS Project isn't that difficult.

In the following slides, I'll show how to create a simple project plan using a real project example.

Setting up a new project

Let's create a new project and make some general adjustments.
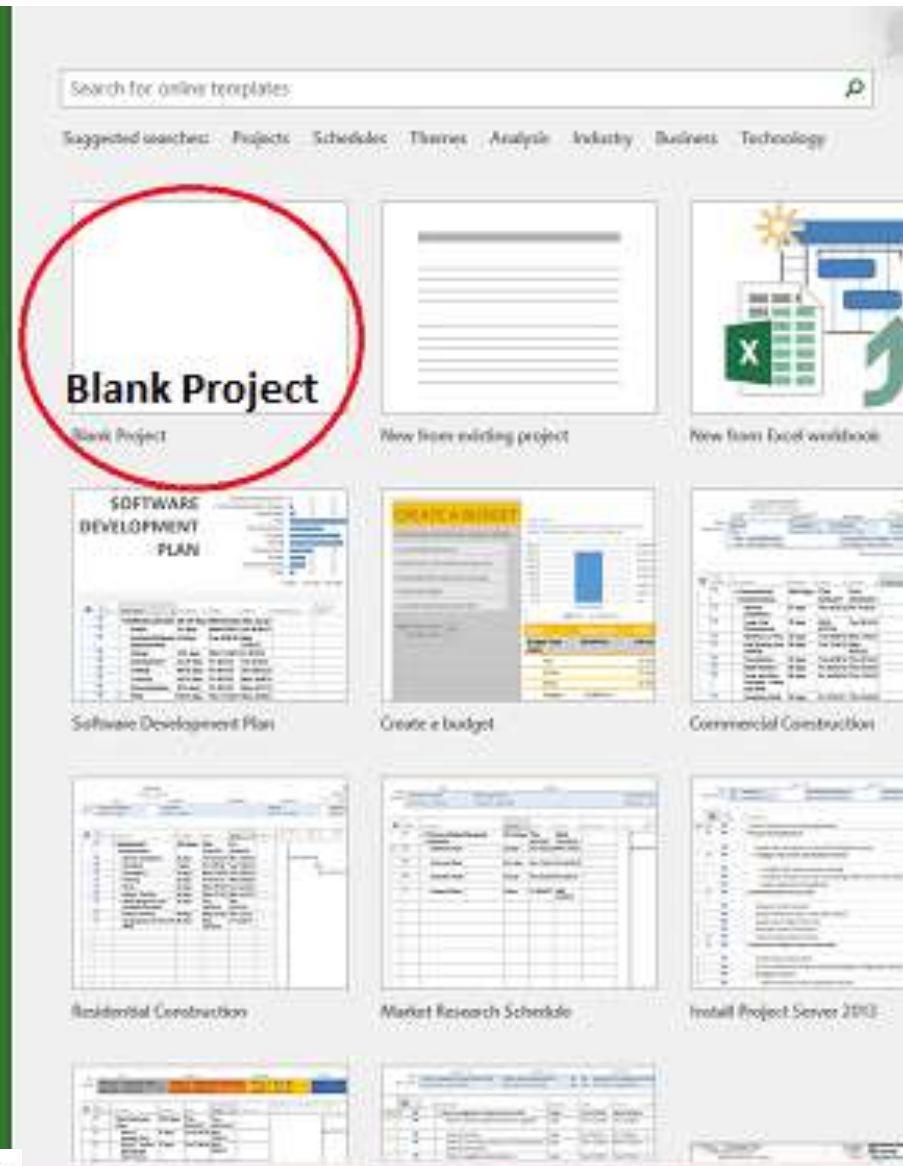
By the way I'm using MS Project 2016 here.

STEP 1:
CREATING THE PROJECT

• After MS Project has launched, choose:

File > New > Blank Project

• When you create a new project, MS Project sets the current date as the plan's start date.
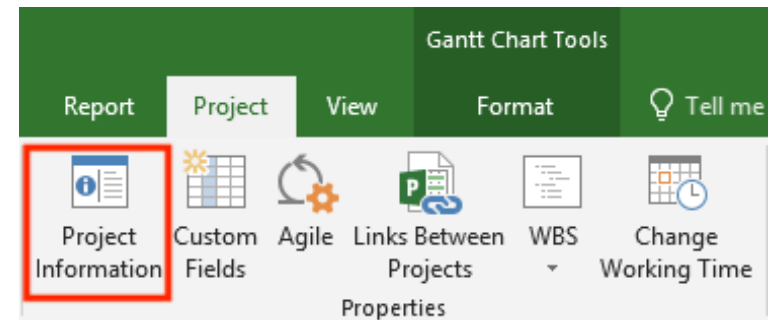

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STEP 2:
GENERAL PROJECT SETTINGS

• For every new project, you want to change some key information before continuing.

• Go to:

Project > Project Information

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STEP 2.1:
PROJECT START DATE

• Enter the start date of your project

• Don't worry, you can change the start date later.

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STEP 2.2 SET THE CALENDAR

See field *Calendar* in the same dialog:

Here you can select alternative calendars:

Standard – 8-hour work days from Monday to Friday, with 1-hour break *(use this one)*

24 hours – if there are no breaks and no non-working time

Night Shift – Covers 11 pm to 8 am an all nights from Monday to Friday, with one hour breaks

Once you have made the settings, choose "OK" to close the dialog box

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Now, let's create a real project

I'm not going to bore you with an artificial project like 'how to bake a cake' or that kind of BS. We'll create the plan for a real project.

In this case, **it's a project where a company is moving to a new office space**, and we are in charge of planning the move, including getting office furniture and all office stuff shipped to the new location. And we want to do this without interfering with daily business.

People should be able to do their work, then on the weekend all items will be transferred, so that your colleagues can start working from the new office building the following Monday.

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Key project data

Goal

- Office relocation

Timeline

- March – October

Project phases

- Project preparation, Selection of offices, Space design and furnishing, Physical relocation

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Building the Task List

STEP 1

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ENTER TASKS

Now enter the tasks for the first project phase in the tabular view

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STEP 2

ENTER TASK DURATION

- Now we enter the start and finish date for each task.

- In this case, MS Project automatically calculates the duration

- Tip: You can also enter a start date and a duration and let MS Project calculate the Finish date.

	i	Task Mode	Task Name	Duration	Start	Finish	Predecessors
1							
2		📌	Set up project organization	22 days	Thu 01.03.18	Fri 30.03.18	
3		📌	Create project plan	22 days	Thu 01.03.18	Fri 30.03.18	
4		📌	Nominate in-house relocation coordinator	22 days	Thu 01.03.18	Fri 30.03.18	
5		📌	Establish a budget	5 days	Mon 26.03.1:	Fri 30.03.18	
6		📌	Define relocation requirements (space, location etc.)	22 days	Thu 01.03.18	Fri 30.03.18	
7		📌	Project approved by management	1 day	Thu 29.03.18	Thu 29.03.18	

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When entering duration, use the following logic:

Duration you want to enter	What to enter	How it appears in MS Project
30 minutes	30m	30 mins
6 hours	2h	6 hrs
3 days	3d	3 days
6 weeks	6w	6 weeks
4 months	4mo	4 months

Now we have to talk about how Project uses those values to calculate the duration of your project.

When you enter for example a duration of 12 days for a task, the task will span across 3 weeks.

Why? In MS Project's default configuration, a week as only 5 workdays.

Therefore the task will consume two full weeks plus 2 days of the 3rd week. Got it?

**The table on the right shows you what default settings apply**

| Value entered	Value	MS Project default value
1 month	28 to 31 days, depending on the month	160 hours (20 workdays)
1 week	7 days	40 hours (5 workdays)
1 day	24 hours	8 hours (1 workday)
1 hour	60 minutes	60 minutes

OPTIONAL:
CHANGE DEFAULT CALENDAR AND TIME SETTINGS

• You can change the time settings and even create a new calendar based on your needs. This is great if you want MS Project to consider country or company-specific non-working days.

• Remember, in the default setting every day from Monday through Friday is considered a normal working day by Microsoft Project.

• To change the settings, go to the **Project tab –> *Change Working Time***
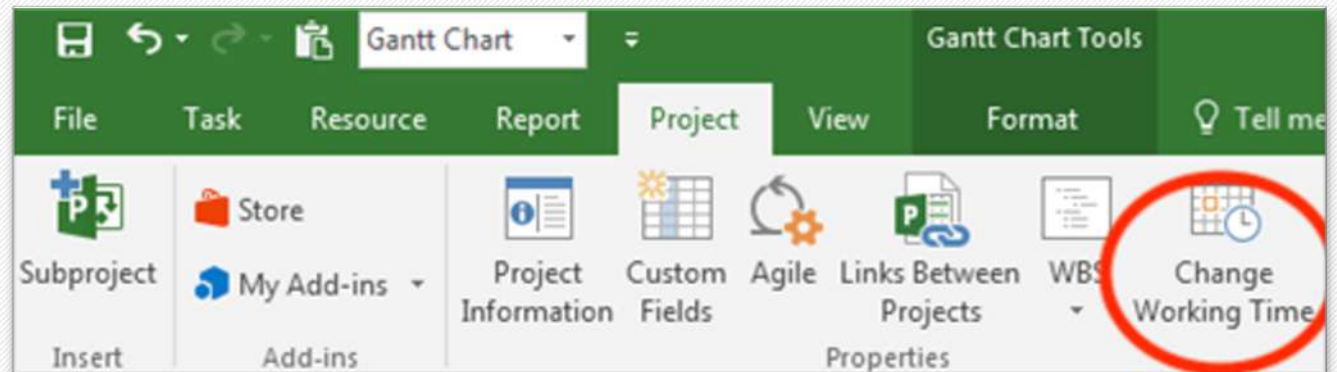
- Here you can change the calendar settings (e.g. mark specific days as nonworking days). To change the default time settings, click "**Options**".

- Go to **Options** –> **Schedule** to change default working hours. Press "**OK**" to save the settings.

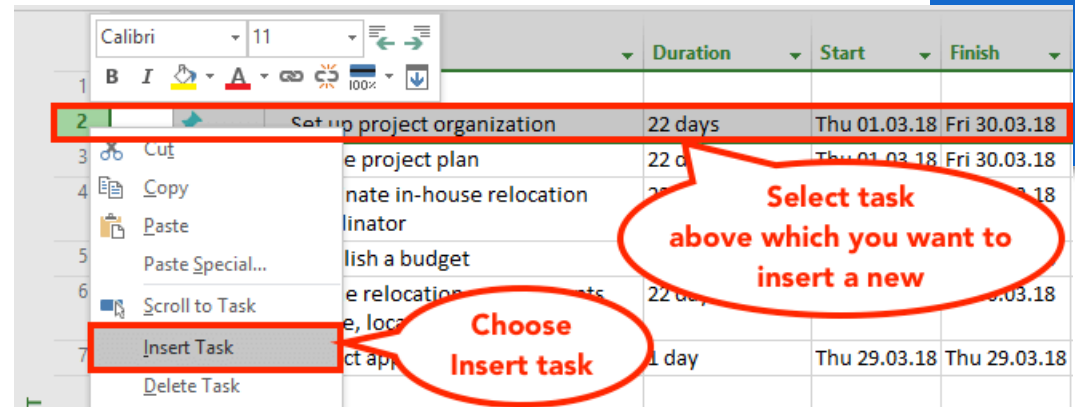tactical project manager
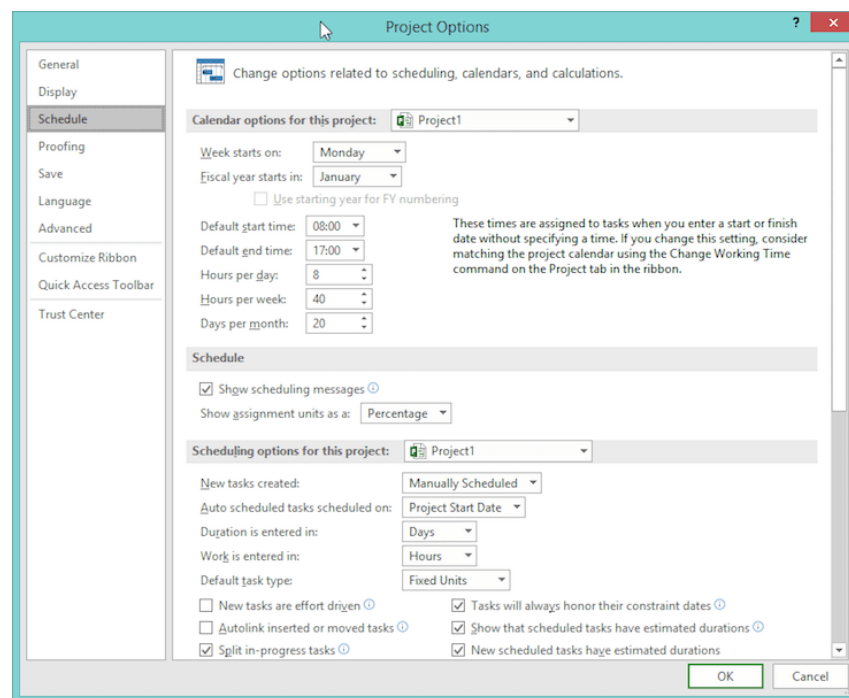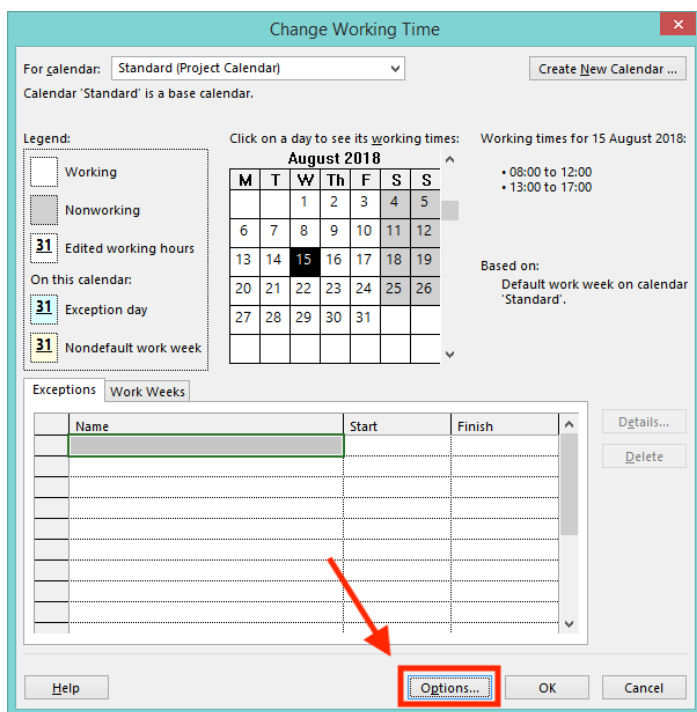
STEP 4

STEP 3

CREATING SUMMARY TASKS

When you have to manage dozens or even hundreds of tasks, it makes sense to group tasks together into **summary tasks**.

A summary task is not an actual task. It's more like a "wrapper" to group several related tasks together under one name. Duration, start and end date of a summary task depends on the tasks included under the summary task. The start date will be the earliest start date of all subordinated tasks. Likewise, the end date of a summary task is equal to the latest end date of the subordinated tasks.

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To create a summary task, we first create a new task above the first one.
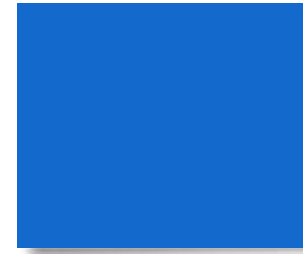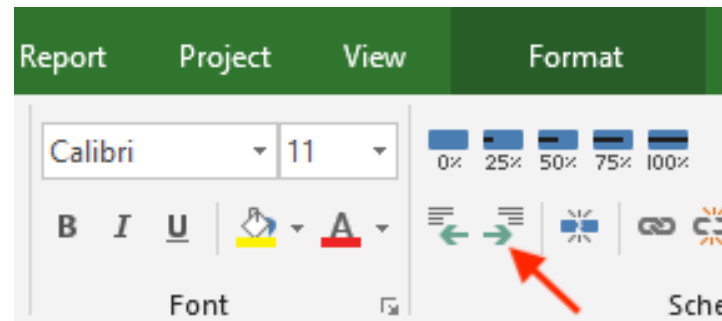
Select the 2nd row, press the right mouse button and choose *Insert Task*:
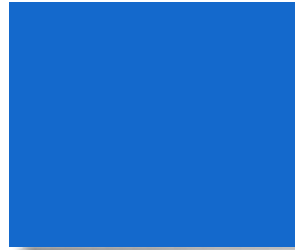
In the new row, enter the new task *Project preparation*:

Now, **select rows 3-8** and press the indentation button in the *Format* tab:

You should get the following result:

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Project preparation is now a summary task. You can see this by the **bold** font and the little black triangle next to the task.

Project preparation is our first project phase during which we set up the project, including creating a project plan, staffing the project and <u>creating a project budget</u>.

Tip: You can create more levels of depth, depending on the complexity of your project. All you have to do is define a summary task and indenting the activities that should be rolled up.
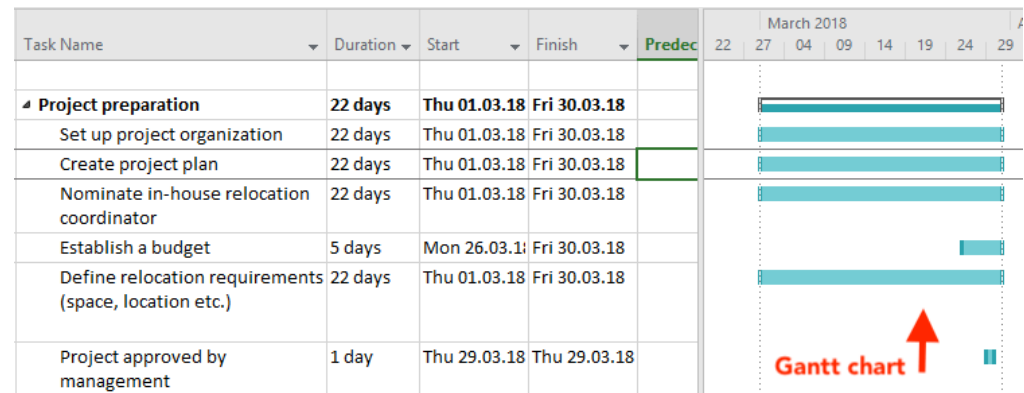
BEFORE YOU CONTINUE, TAKE A LOOK AT THE GANTT CHART

I want you to take a look at the nice Gantt chart that MS Project has created automatically for our project.

The Gantt chart is a visualization of the project using bar charts. You can see it in the right side of the screen.

(Did you know? You can also create a nice Gantt chart in Excel)

(you can also create Gantt charts easily in Excel)

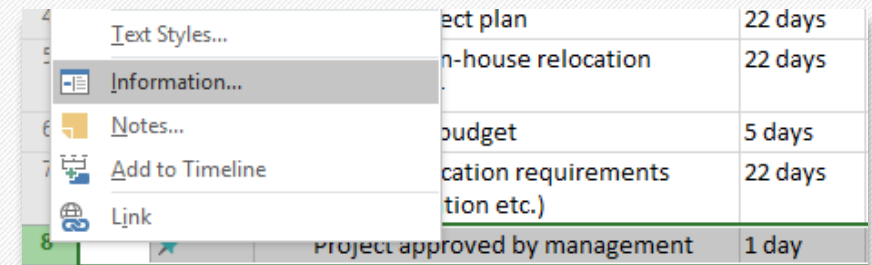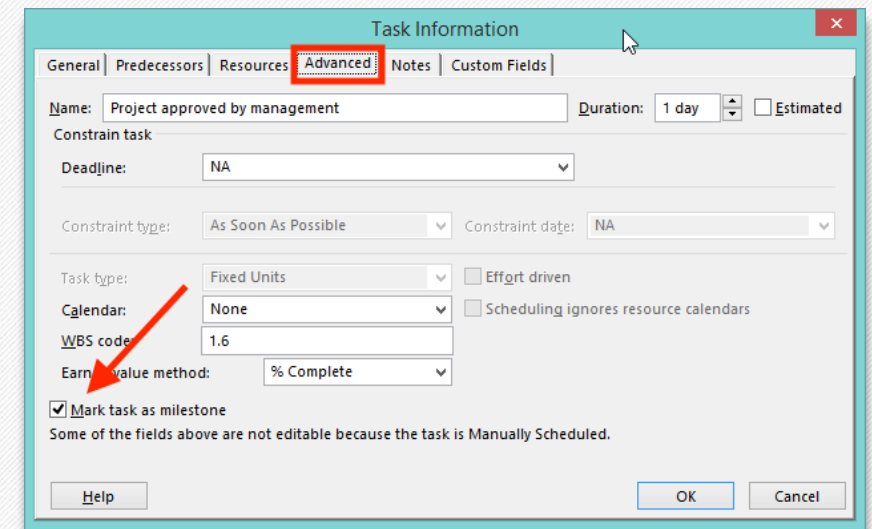| Task Name	Duration	Start	Finish	Predec	March 2018
▲ Project preparation	22 days	Thu 01.03.18	Fri 30.03.18		
Set up project organization	22 days	Thu 01.03.18	Fri 30.03.18		
Create project plan	22 days	Thu 01.03.18	Fri 30.03.18		
Nominate in-house relocation coordinator	22 days	Thu 01.03.18	Fri 30.03.18		
Establish a budget	5 days	Mon 26.03.1	Fri 30.03.18		
Define relocation requirements (space, location etc.)	22 days	Thu 01.03.18	Fri 30.03.18		
Project approved by management	1 day	Thu 29.03.18	Thu 29.03.18		

Gantt chart

CREATING A MILESTONE

Milestones are specific points on the project timeline. They are used to measure or review the progress of a project, and to inform management and stakeholders about the current status. Technically, a milestone is like a task with zero duration. Milestones are used as markers for major achievements, such as *"construction completed"* or *"project approved by management"*.

To create a milestone, select a task and right-click –> Go to *Advanced* and check "**Milestone**" in the dialog box:

Once you click "OK", take a look at the Gannt view.
You now see the task is marked as a diamond with a date next to it.

Here it is: *Project approved by management* is now a milestone:
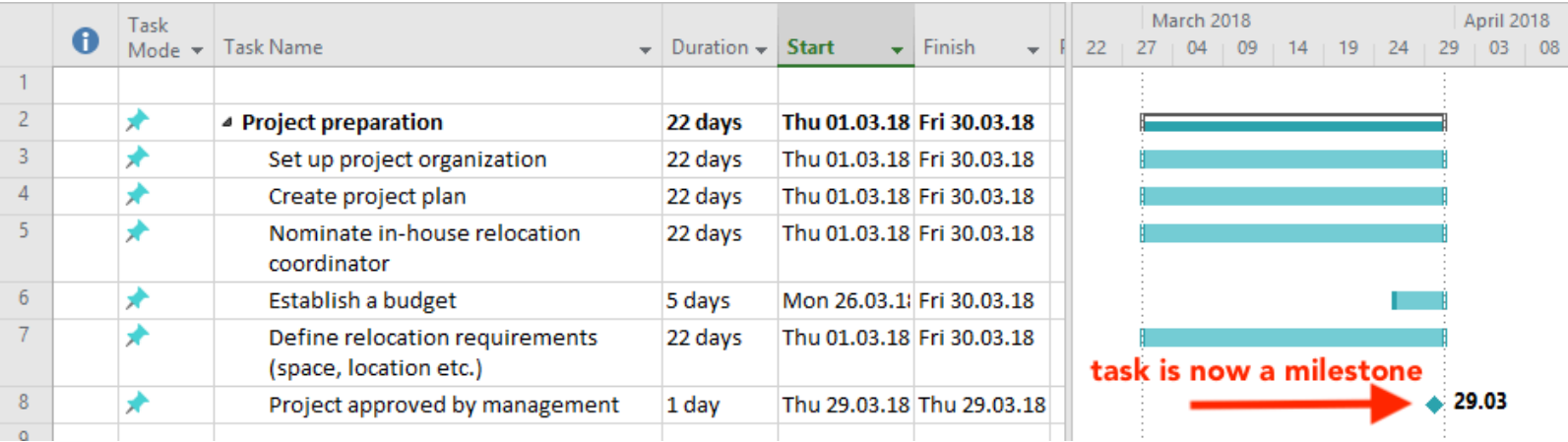
LINKING TASKS IN A SPECIFIC SEQUENCE

Project-related tasks have to performed in a specific order, so that we can accomplish the project objectives.

Once you have entered the list of tasks, it is time to link these tasks together.

Take a look at the screenshot:

You can see our two project phases *Project preparation* and *Selection of offices* in bold. Both are summary tasks (scroll up if you've missed how to create summary tasks).

In the logical sequence, *Selection of offices* should come after *Project preparation* is complete.

Using the terminology of MS Project, we must make *Project preparation* the **predecessor** of *Selection of offices*, which means it should come before the office selection phase.

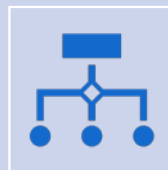We can easily make Project preparation the predecessor by entering "1" as the predecessor number in the "Predecessors" column. "1" is the task number of Project preparation.

	Task Name	Duration	Start	Finish	Predecessors
1	◢ **Project preparation**	**4,4 wks**	**Thu 01.03.18**	**Fri 30.03.18**	
2	Set up project organization	2,4 wks	Thu 01.03.18	Fri 16.03.18	
3	Create project plan	4,4 wks	Thu 01.03.18	Fri 30.03.18	
4	Nominate in-house relocation coordinator	4,4 wks	Thu 01.03.18	Fri 30.03.18	
5	Establish a budget	1 wk	Mon 26.03.18	Fri 30.03.18	
6	Define relocation requirements (space, location etc.)	4,4 wks	Thu 01.03.18	Fri 30.03.18	
7	Project approved by management	1 day	Thu 29.03.18	Thu 29.03.18	
8	◢ **Selection of offices**	**20 wks**	**Mon 02.04.18**	**Fri 17.08.18**	1
9	Source & brief property consultant(s)	2 wks	Mon 02.04.18	Fri 13.04.18	
10	Interview property consultant(s)	1 wk	Mon 16.04.18	Fri 20.04.18	9
11	Select & instruct property consultant	1 wk	Mon 23.04.18	Fri 27.04.18	10
12	Inspect potential business space with property consultant	4 wks	Mon 30.04.18	Fri 25.05.18	11
13	Source & brief property solicitor(s)	2 wks	Mon 02.04.18	Fri 13.04.18	
14	Select & instruct property solicitor	1 wk	Mon 16.04.18	Fri 20.04.18	13

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Congratulations!

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As I told you at the beginning, MS Project isn't that hard to use. I suggest you spend some more time playing around with Project and working with your sample project.

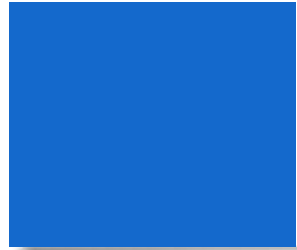Specifically, you should practice the following tasks:

- Creating a new project
- Entering new tasks
- Adjusting duration, start and end date of tasks
- Linking several tasks together in a specific sequence
- Printing the project plan
- Saving your new project 🙂

You've just created your first project plan in MS Project!
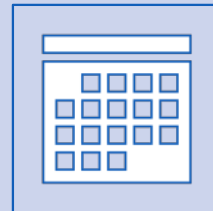
Manual vs. automatic scheduling

One last point I want to touch before you leave is manual vs. automatic scheduling.

MS Project supports two ways of scheduling tasks and calculating the overall project timeline.

Which method should you choose?

In **manual scheduling**, you set the start and end date manually for every task. For example, you might say *"Our business planning workshops will take place from Wednesday September 5th til Friday September 14th"*. Then you schedule this activity for those exact days.

In **automatic scheduling**, you set the start date for the entire project, and you define how long each task will take to complete (*"Our business planning workshop takes 5 days"*). Then, once you've set the dependencies (linking the tasks in the right sequence), Project is able to calculate the entire schedule automatically for you.

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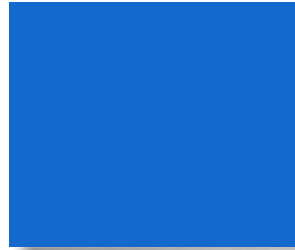
Of course, in its default configuration, MS Project doesn't consider your individual scheduling preferences.

If you have a developer who works only 3 days per week, Project would not know that, and an automatically generated plan would be inconsistent with your actual circumstances.

That's because Project would assume that any task can be scheduled on all 5 workdays.

Which scheduling mode should you use?

I recommend you always start with manual, and that you only switch to automatic mode once you know exactly what tasks have to be performed, how long they will take etc. It's also perfectly fine to stay with manual scheduling!

Read my article: Manual vs Automatic scheduling Explained

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What questions do you have?

With this article my goal was to get you started with MS Project, so naturally there will be more topics you want to know about.

Tell me what you most burning questions are.

I'll answer every question you ask.

THANK YOU!

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