Microsoft Project
Simple tips for newbies

Are you struggling to get your head around Microsoft Project? Working with Microsoft Project myself and training end-users, I have developed a list of things that help keep a project simple and a project plan effective.

STORY
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Project managers that come to the position through education spend considerable lengths of time studying to do their job well and learn how to use Microsoft Project. Others, such as construction project managers, are often introduced to Microsoft Project when promoted to the role after building a career on the tools. For many, this is their first time using Microsoft Project, and they struggle to get their head around the application. Even after attending quite advanced training, they don't always understand how to get the most basic schedule to behave itself within the software.

Project plans have often been prepared by a predecessor, and without the more in-depth understanding of how Microsoft Project works, they feel like they are fighting the application to achieve a result that, in their own minds, can be managed much better on the back of an envelope.

Working with Microsoft Project myself and training end-users, I have developed a list of things that help keep a project simple and a project plan effective.

What is Microsoft Project?

The best description that I've heard for Microsoft Project is Excel packaged for project professionals. In reality, the project file is a collection of worksheets. These worksheets have been defined with specific roles in mind. A sheet for tasks, a sheet for resources, sheets that define relationships between those tasks and resources. These are supported by a collection of forms, views and reports overlaid to assist the presentation of data stored within those core sheets.

Within each of the sheets there are columns of data. Most columns have already been defined with the type of information required. When you first open Microsoft Project, you're presented with a Gantt chart view of a limited number of those columns. To really understand what's happening inside Microsoft Project, you need to examine those columns and ensure the information entered into them, or calculated by them is what you need to manage the project effectively.
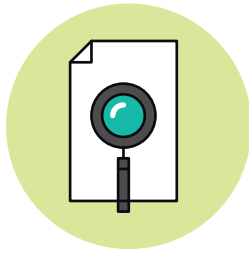
Step 1

Check the project information

Project files created for one project are often reused over and over again as a template for subsequent projects. I recently found a client's project file where the project started in July 2019, but the project start date was set in 2013! This creates a situation where any new task which is not linked into the network defaults to the 2013 start date. The first thing project managers should do when examining project files or setting up new ones is to review the project information dialogue box.

The most important date that we set in a project is an accurate start date. If your tasks are configured to auto-schedule, unless they are constrained or linked into the network, they will default to the project start date.

Check that the start date is accurate

Step 2

Use sheets for data entry

When configured with its default views, Microsoft will always open up showing the user a Gantt chart with a split in the middle between some data entry cells on the left-hand side and the Gantt chart on the right. Many project managers never alter this view. They really need to explore the application more to achieve great results.

Use sheets for data entry and Gantt charts for reporting. Switching to the task sheet hides the Gantt chart. This ensures your focus is on the information going in, not the result in the chart. You can always switch that back on to review your results later.

Now we can start to expose the columns that will help us to create an effective project plan.

This is where you can expose the useful date columns. This includes the start and finish columns, which are usually present by default; the actual start and actual finish columns, which should be set to NA during the planning stage; the constraint type and the constraint date; predecessors and successors; and finally the type column. Working in this sheet view means you don't need to open the task dialogue to enter data. You can also drag data down a column when you need to set similar values across a range of tasks.

Step 3

### Simple rules for creating your project

1 Always create a start and end milestone.

2 Don't use summary tasks; they make the sheets harder to review and identify problems. I like to keep my project plans as simple as possible. Summary tasks complicate things. I prefer to use text fields to create task categories. This enables multiple dimensions to be assigned to the task for improved filtering and reporting.

3 Every task (except the start and end milestones) MUST have a predecessor and a successor. When you open a project sheet and can see the predecessor and successor columns, empty cells are a problem to be fixed. Only the start and end milestones should have one of each.

4 Review constraints and remove them if they are not real. If you do have to add a constraint, make sure you enter a note to tell other file users what is causing it.

Project managers come into the role through many paths, and those with industry experience are well-positioned to produce excellent results. When this industry experience is combined with an ability to use their new software tools, delivering on time and on budget moves from aspiration to reality.

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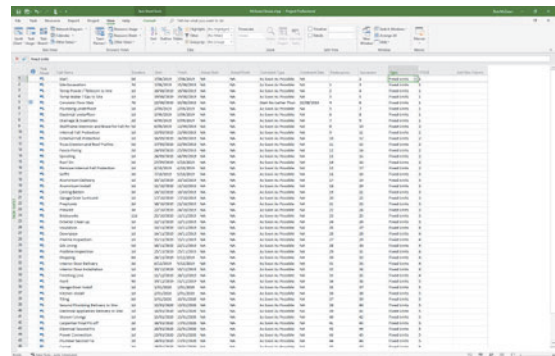
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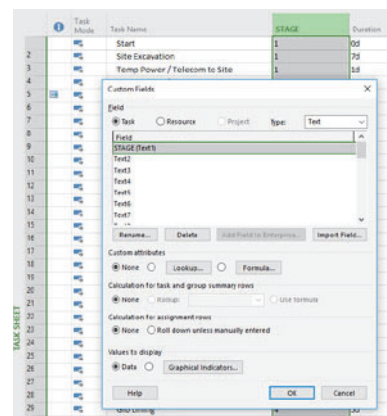
Use text fields to identify stages

Set milestones