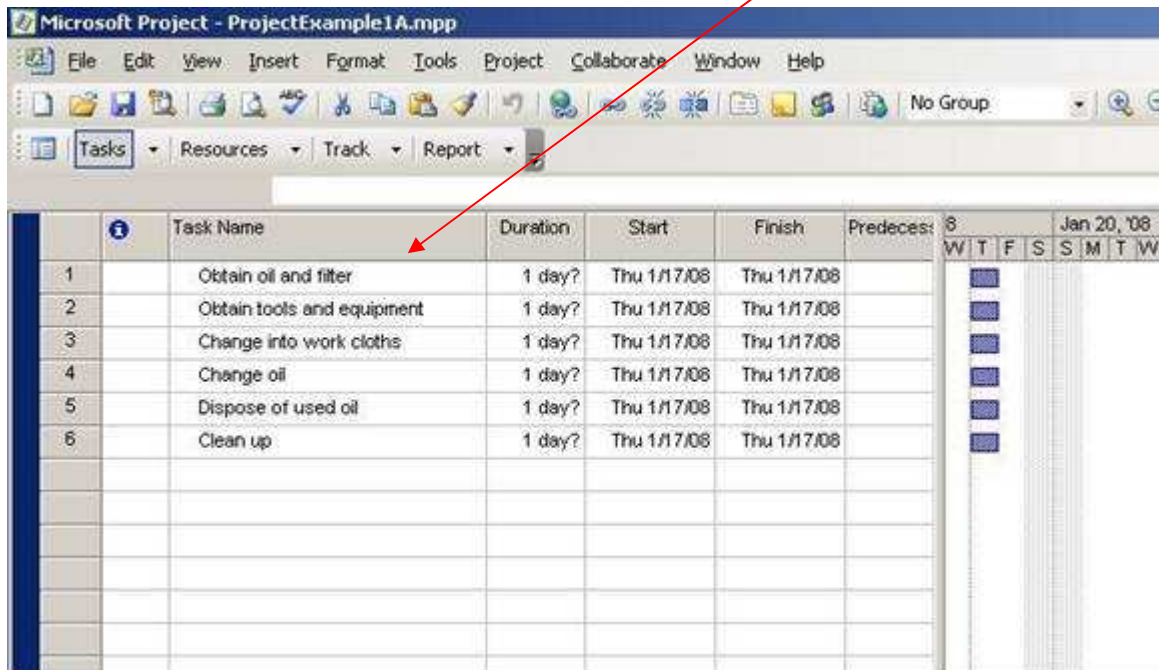


Basic How-to create a schedule using MS Project

Note: tool bar icons are discussed at the end of this document. Refer to them as needed.

Step 1 – determine major tasks, enter them in Task Name column (enter them in chronological order). Remember, these are tasks and must contain a verb. Avoid the verb “design” since this is ambiguous and is actually a process containing many tasks (it is not a single task).



The screenshot shows the Microsoft Project interface with a task list table. A red arrow points to the 'Task Name' column header. The table contains six tasks, each with a duration of 1 day and a start/finish date of Thu 1/17/08. The tasks are: Obtain oil and filter, Obtain tools and equipment, Change into work cloths, Change oil, Dispose of used oil, and Clean up. The interface also shows a menu bar (File, Edit, View, Insert, Format, Tools, Project, Collaborate, Window, Help) and a toolbar with various icons. The 'Tasks' menu is currently selected.

	Task Name	Duration	Start	Finish	Predecessors	8	Jan 20, '08
						W	T F S S M T W
1	Obtain oil and filter	1 day?	Thu 1/17/08	Thu 1/17/08			
2	Obtain tools and equipment	1 day?	Thu 1/17/08	Thu 1/17/08			
3	Change into work cloths	1 day?	Thu 1/17/08	Thu 1/17/08			
4	Change oil	1 day?	Thu 1/17/08	Thu 1/17/08			
5	Dispose of used oil	1 day?	Thu 1/17/08	Thu 1/17/08			
6	Clean up	1 day?	Thu 1/17/08	Thu 1/17/08			

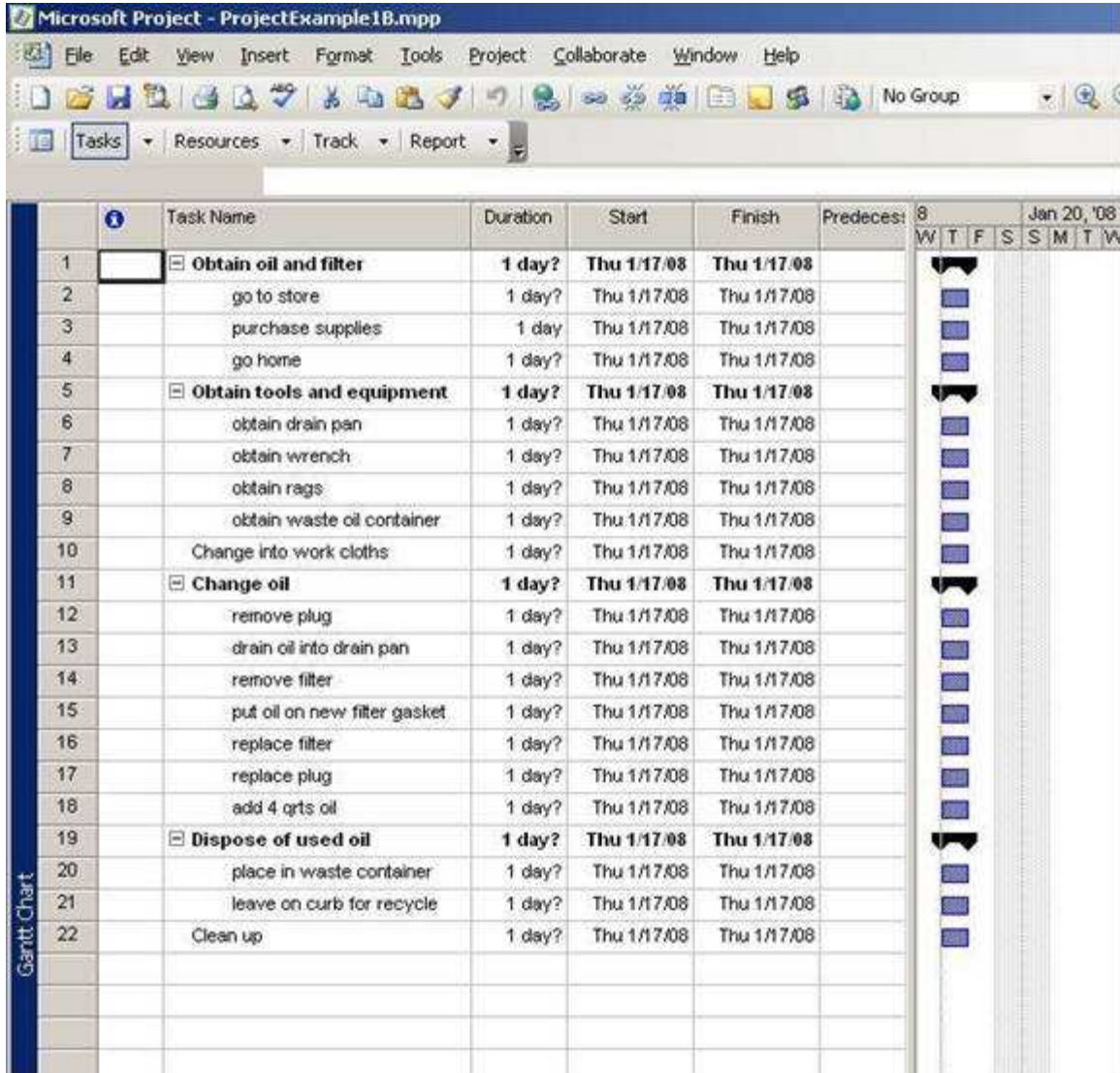
Step 2 – highlight rows just below the major tasks and hit the “insert” key to insert blank rows. Enter the subtasks for each major task (if there are any). Remember to use verbs. Then highlight the subtasks (for a given major task) and click on the “right arrow” key on the toolbar (see last page for comments on toolbar icons).

How many levels of subtasks are needed? It depends on the detail desired. Remember, this is a tool to be used during the execution of the project. It should be detailed enough to communicate what tasks need to be done and when, but not “ridiculously” detailed. The example shown here is probably appropriate for someone not familiar with changing oil, but is too detailed for someone who is.

	Task Name	Duration	Start	Finish	Predecessors	Jan 20, '08
						S M T W
1	[-] Obtain oil and filter	1 day?	Thu 1/17/08	Thu 1/17/08		
2	go to store	1 day?	Thu 1/17/08	Thu 1/17/08		
3	purchase supplies	1 day	Thu 1/17/08	Thu 1/17/08		
4	go home	1 day?	Thu 1/17/08	Thu 1/17/08		
5	[-] Obtain tools and equipment					
6	obtain drain pan					
7	obtain wrench	1 day?	Thu 1/17/08	Thu 1/17/08		
8	obtain rags	1 day?	Thu 1/17/08	Thu 1/17/08		
9	obtain waste oil container	1 day?	Thu 1/17/08	Thu 1/17/08		
10	Change into work clothes	1 day?	Thu 1/17/08	Thu 1/17/08		
11	Change oil	1 day?	Thu 1/17/08	Thu 1/17/08		
12	remove plug	1 day?	Thu 1/17/08	Thu 1/17/08		
13	drain oil into drain pan	1 day?	Thu 1/17/08	Thu 1/17/08		
14	remove filter	1 day?	Thu 1/17/08	Thu 1/17/08		
15	put oil on new filter gasket	1 day?	Thu 1/17/08	Thu 1/17/08		
16	replace filter	1 day?	Thu 1/17/08	Thu 1/17/08		
17	replace plug	1 day?	Thu 1/17/08	Thu 1/17/08		
18	add 4 qrts oil	1 day?	Thu 1/17/08	Thu 1/17/08		
19	Dispose of used oil	1 day?	Thu 1/17/08	Thu 1/17/08		
20	place in waste container	1 day?	Thu 1/17/08	Thu 1/17/08		
21	leave on curb for recycle	1 day?	Thu 1/17/08	Thu 1/17/08		
22	Clean up	1 day?	Thu 1/17/08	Thu 1/17/08		

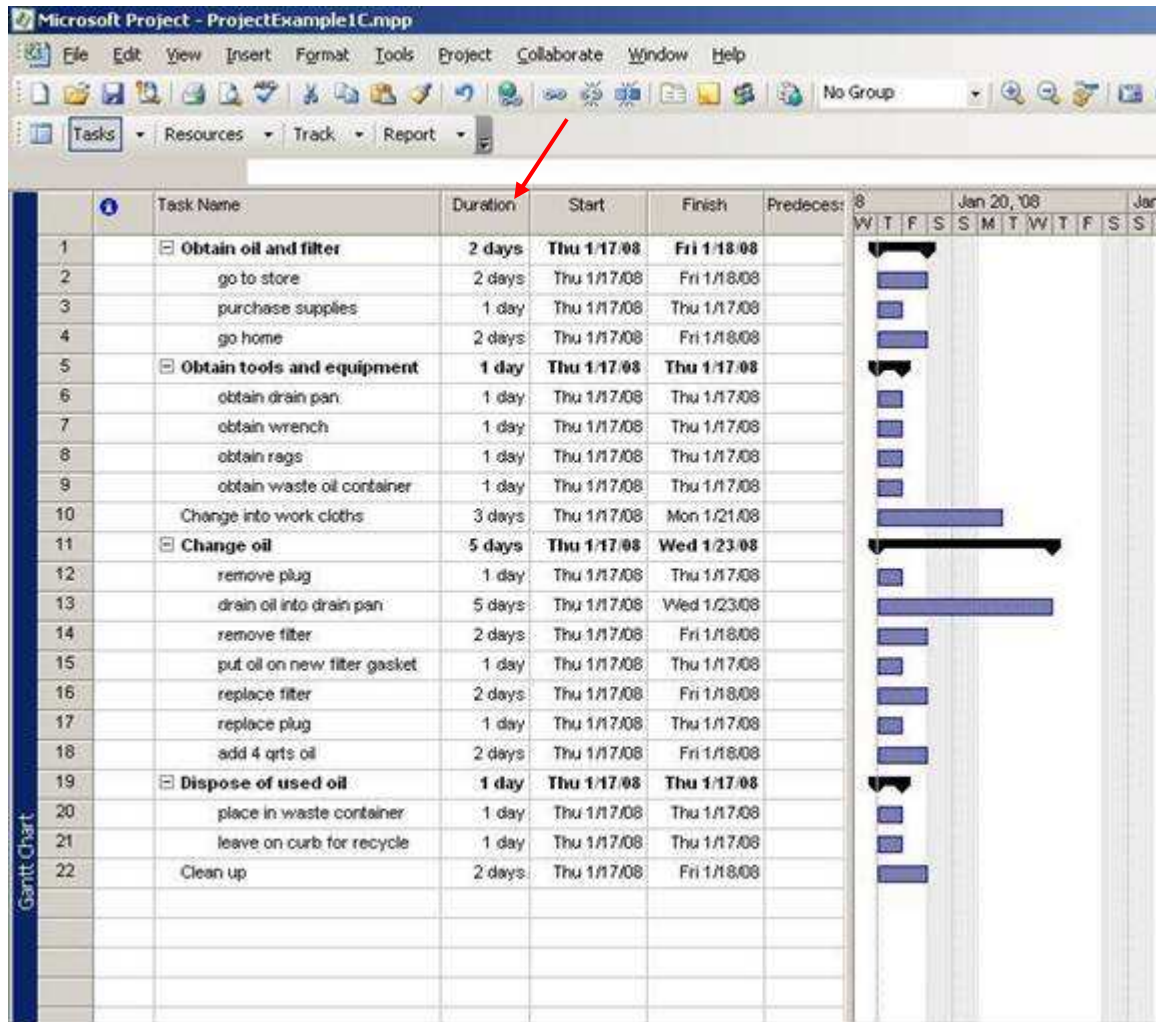
The highlighted tasks will become subtasks for “Change oil” once the “right arrow” icon is pushed.

After completing step 2, the schedule will look like this:

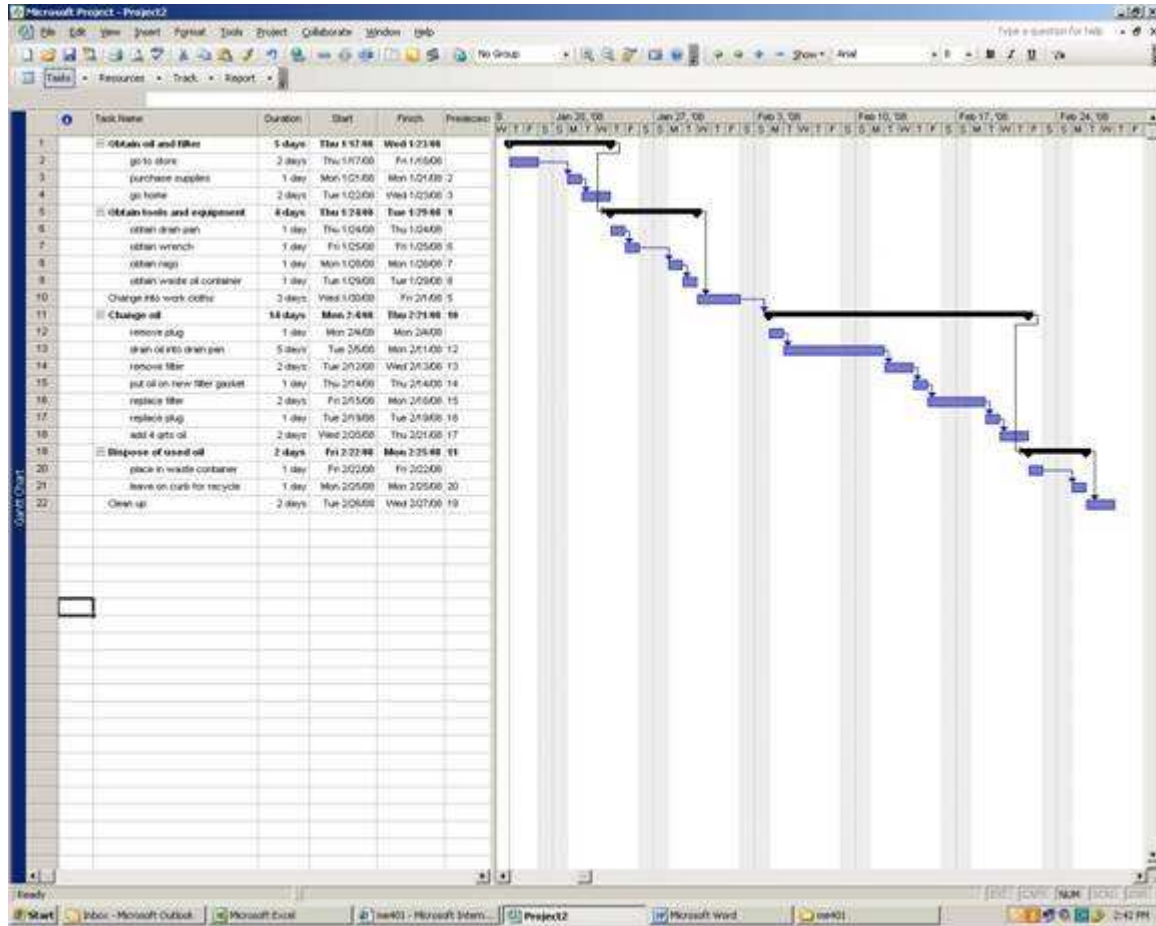


Step 3 – enter the duration for the subtasks (and major tasks that *do not* have subtasks). Do NOT enter duration for any task that contains subtasks (MS Project will take care of that for you). Notice that if you wish the task duration to be 1 day, then you will need to change the default entry of 1 day? to eliminate the “?” (just type in “1” or hit the arrow up and down keys once).

Do NOT enter “start” or “finish” dates for any task to be linked.



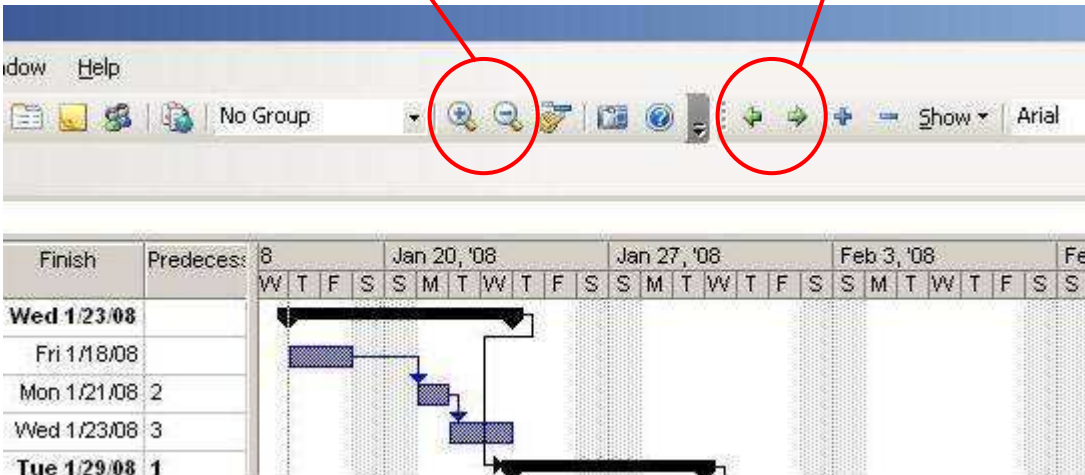
Step 4 – select (highlight) the tasks you wish to be linked and select the link icon. You may enter start or completion dates for tasks (and milestones) that are NOT linked.



Critical toolbar icons:

Use zoom in and out to adjust the magnification of the task bars. Be sure to adjust the magnification so that when you print the page the ENTIRE task bar is on the SAME page as the verbal task description.

Select tasks that you wish to be subtasks. Use “arrow right” to indent and make them a subtask. Use “arrow left” to un-indent.



Link and unlink – these are used after you have entered all tasks (in chronological order). Highlight the tasks that you want to be linked (predecessors and successors). Use the unlink icon to undo links.

