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).
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.
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.