


Steps to use Microsoft Project effectively

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1. Make sure that a Project Charter has been created
2. Create a Work Breakdown Structure (WBS)
3. Create a new Microsoft Project plan
4. Define project start or finish date
 - a. Go to Project > Project Information
5. Define the project calendar
 - a. To create a base calendar, go to Tools > Change Working Time
 - b. To assign a project calendar, go to Project > Project Information
6. Enter tasks
 - a. Remember to include a start task and a finish task
7. Enter duration for individual tasks
 - a. Put in an accurate duration
8. Link tasks
9. Optimize project schedule
 - a. Task Relationships: F-S, S-S, F-F, S-F
 - b. Lag and Lead time

** double-click on link arrow to set task relationships, lead and lag time*
10. Create resources in resource list
 - a. Go to View > Resource Sheet
11. Assign Resources
 - a. Go to View > Gantt Chart
 - b. Click on the assign resources icon 
 - c. Address over allocation issues
12. Create a baseline
 - a. Go to Tools > Tracking > Save Baseline
13. Track the project
 - a. Update the project plan
 - b. Document variances
 - c. Compare it against baseline
14. Archive project plan