

## The Microsoft Project 2016 – Before You Plan Your First Project.

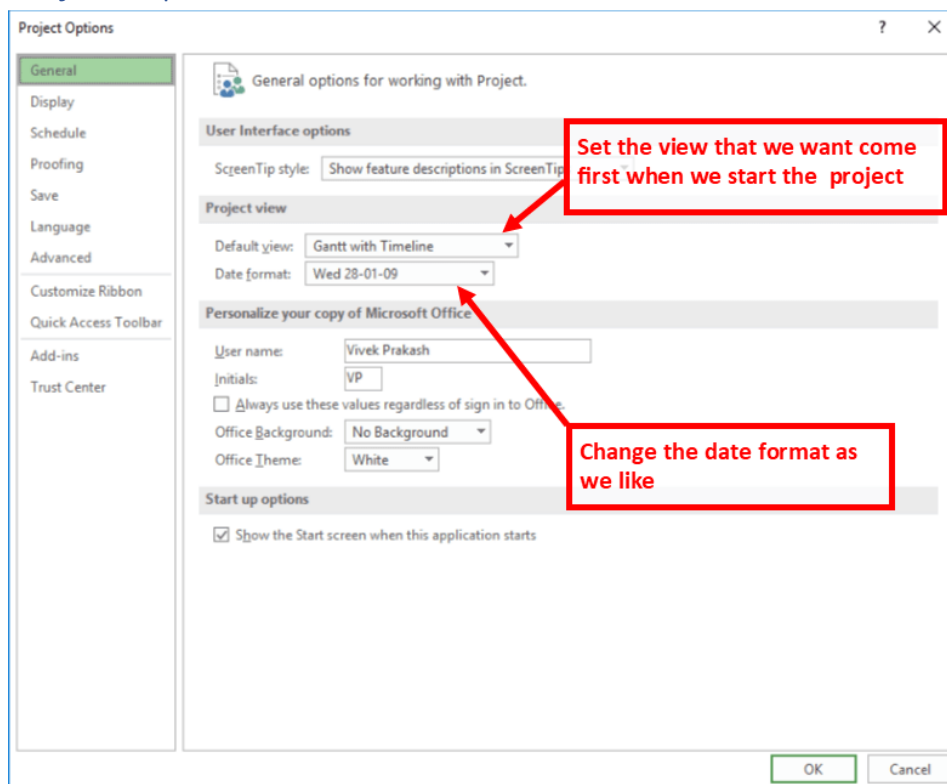
Microsoft Project has some standard settings however these standard settings may not match with your organization's working. My currency in which I manage my cost may not be US dollars. My working hours may be different than what is set in project 2016. For example, my organization may work 6 days a week. I may not want timeline view to come by default when I start the project. There could be many such requirements which do not match with default settings of MS Project. If we do not make changes in default settings before start using MS Project, it may be a struggle to work with MS Project. Many of us face such issues. Let's understand how we can adopt MS Project in our environment.

When we hire a new resource, we normally do an induction. The purpose of the induction is that the resource should come to know how this organization works. This will help the resource to work smoothly in the organization. Similarly MS Project is also a resource and we should induct it in our organization.

MS Project 2016 or MS Project 2013 or MS Project 2010 provide project options to set various defaults in the project. We may know all such settings later but right now before starting our first project, we must ponder on some settings that affect our day to day scheduling.

To access project options, go to File -> Options. We can see various tabs on left hand side. Right now, we will look into first three tabs – General, Display and Schedule and set some options according to our organization which are important before scheduling the first project.

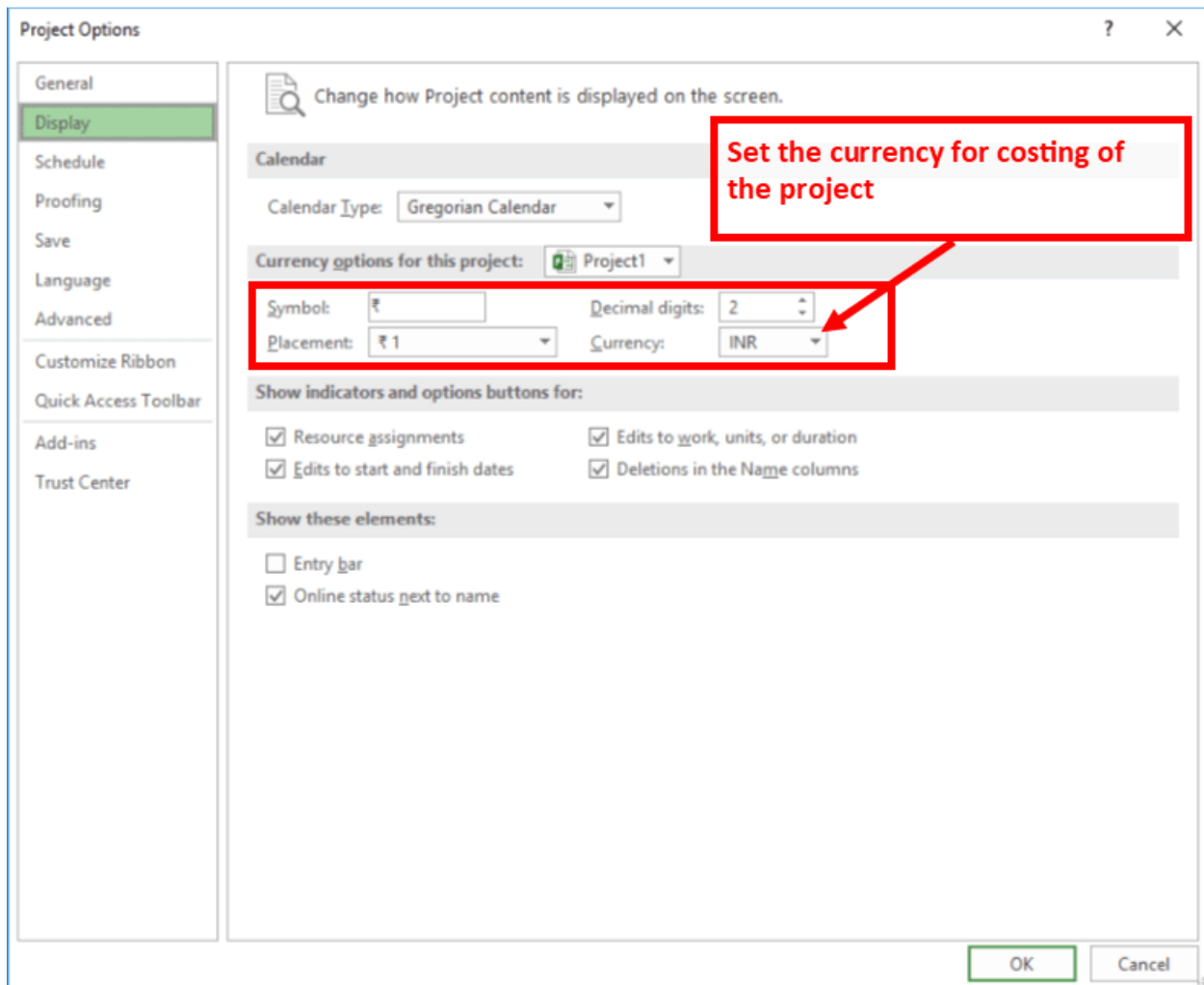
### Project Options – General Tab:



Let's look at General tab first. At this juncture when we are setting basic options before starting our first project, we should just focus on two options that is set default view and right date format. Default view helps us to set a view that we want to see when we start MS Project. For example by default, default view is Gantt with Timeline. If we do not want to see Timeline view as default. We can select Gantt Chart. Now when we open MS Project next time, we see only gantt chart and not the timeline view.

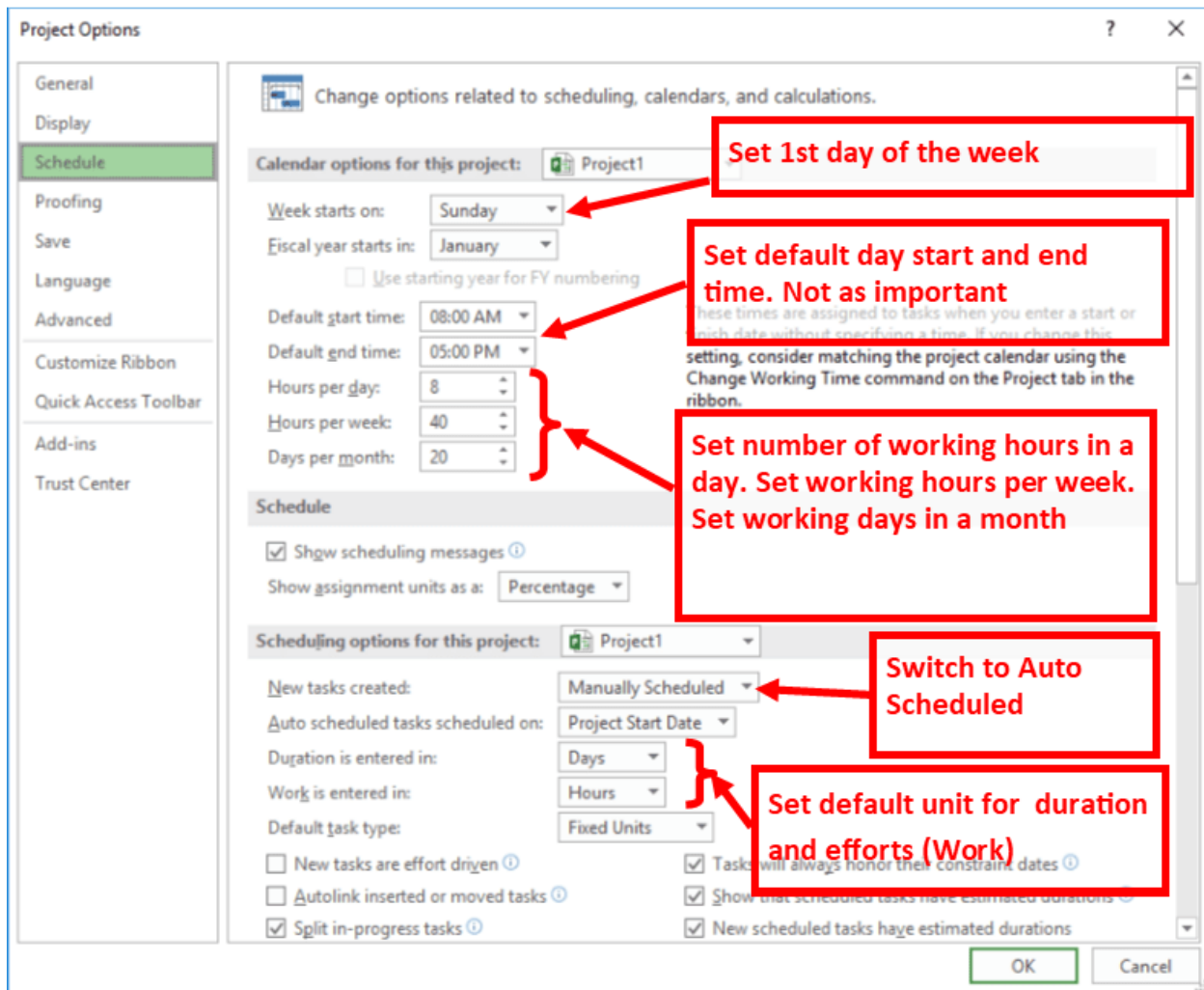
Date format sometime could be confusing especially when we are sharing our project schedule with another team or stakeholders who use different date format than us. We can use Date format drop down box to select a date format that is convenient to all stakeholder or team members. Available options may be limited to our computer regional settings.

## Project Options – Display Tab:



Let's move to Display tab. At this time when we are setting basic options before starting our first project, we should focus on just one option that is set the right currency for our project. From the currency drop down box select the currency in which we want to maintain our cost.

## Project Options – Schedule Tab:



Let's come to Schedule tab. Here we need to take care of multiple settings as they directly impact our day to day scheduling. If we do not set them correctly, it will be difficult to schedule and also create confusion. We will look into some of the settings that are important at this stage

**Week start on:** This setting does not participate in scheduling however impact your experience a bit. We select a day that we want to appear as 1<sup>st</sup> column on the calendar. If I select Monday, it means week starts on Monday (Monday will appear as 1<sup>st</sup> column) and end at Sunday (Sunday will appear as last column)

**Default start and end time:** As such not that important. This setting will not impact the schedule. This setting basically help matching time with our regular office time. That's all. Even if they do not match, it does not impact anything in the schedule.

**Hours per day, Hours per week and days per month:** These 3 settings are most important and directly impact scheduling. If they are not set properly or not in line with one another, one can observe anomalies in the schedule. **Hours per day** shows working hours in your office (i.e. office in/out time minus break time). After these many hours, day will rollover. **Hours per week** shows working hours in a week. Because we have just fixed hours per day, this setting largely depends up on number of working days in a week. After these many hours, week will rollover. **Days per month** shows working days in a month. After these many days, month will rollover. Because there are innumerable permutation and combinations, assigning any formula among them is not easy. Therefore these settings are kept independent. It is left on users to properly fill these details in line with working hours/days of his/her organization. Any anomaly will directly reflect on the schedule and create confusion.

**New task created:** Switch to Auto Scheduled. Microsoft has kept the default to Manually Scheduled mode which is creating problem especially with those people who do not have proper training on MS Project. Many of them are scheduling project in Manually Scheduled mode which is meaningless. Manually Scheduled mode can be used in the beginning of a project if one does not have enough information.

Scheduling in Manually Scheduled mode is like sitting in a car with engine switched off. If we want to go somewhere, we should switch on the engine and drive the car. If we want MS Project to perform its work, we should either keep it on Auto Scheduled mode or switch to Auto Scheduled mode as soon as possible.

**Duration is entered in, Work is entered in:** These two parameters are kept to set default units of measure for duration and efforts. Efforts in Microsoft Project is Work. We should set the default unit (like days or weeks) that we use in general so that we can easily enter our duration or work estimates and calculate project duration or project efforts in the unit we use commonly.

**New tasks are effort-driven:** This can significantly impact the way tasks are scheduled. By default this option is off. When we switch this option on, it will make the scheduling effort-driven. Now Project scheduling engine will not change the total work for the task. When you assign new resources or remove resources or change their allocation, it will always adjust the duration of the task and never change the work we have specified. It will expect from us to enter the amount of work and respect it during any change. More on this in resource allocation section later.