

# Lehnert Computer Services

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**Ask the Teacher: February, 2006**

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**Question:** Is there any set up I should do before I start entering tasks in a new project. It seems that when I just start typing tasks, they don't always react the way I would like them to. What do you suggest?

**Answer:** This is a great question and one that most people who have not been through a training class can answer. So here are the steps I recommend that a user perform BEFORE they enter the first task.

1. **Create a new file:** Click the new button below the File menu
2. **File → Properties** - enter a name for your project and any other data. Also, enter a brief description in the comments box of the purpose or scope of the project. This data may be used as the title on any report for this project.  
**File → Page setup** will allow you to add the project name as the report title.
3. **Tools → Change working time:** set up the calendar that you will be using for the project. Make sure if you change from the default 8 hour day that you enter that information in the options, calendar page also. (button at bottom of this box)
4. **Project → Project Information:** Enter a target start date of the project. This may be changed later as necessary. If you create a different calendar, add the calendar name as the project calendar.
5. **Tools → Options:** There are a lot of options that you could change but the most important for the start of a project are:  
**Schedule tab:**  
Work is entered in: \_\_\_\_\_(be consistent with these 2 options)  
Duration is entered in: \_\_\_\_\_  
The next two options will become the default setting for each task. They maybe altered per task as necessary.  
Default task type: \_\_\_\_\_ (if you are unsure, select Fixed Units)  
New tasks are effort driven: \_\_\_\_\_ (if you are unsure, click off)  
**Calendar tab:**  
Make sure that the number of hours in a work day, work week, and time ranges on this page match with the number of hours for the project calendar.  
**View tab:** (this but optional but worth it)  
Show Project Summary task – this task will act as a grand total for the project plan
6. Start entering tasks