

## 3. Setting-up a New Project

### 3.1 Creating a New Project

Whenever you start using Project a blank project is already shown on the screen. However, to create a new project explicitly...



- use the **New** button on the toolbar or...
- select **File** and **New** or...
- press **Ctrl + N**

### 3.2 Project Information

This is an essential dialog box for specifying important project data and can be set to appear whenever a new plan is created, (via Tools and Options).

 A screenshot of the 'Project Information for 'Project2'' dialog box. The dialog has a blue title bar and a close button. It contains several fields:
 

- Start date: Wed 13/04/05
- Current date: Wed 13/04/05
- Finish date: Wed 13/04/05
- Status date: NA
- Schedule from: Project Start Date
- Calendar: Standard
- All tasks begin as soon as possible.
- Priority: 500

 Below these fields is a section for 'Enterprise Custom Fields' with a table:
 

Custom Field Name	Value

 At the bottom are buttons for 'Help', 'Statistics...', 'OK', and 'Cancel'.

- To view the 'Project Information' dialog box select **Project** and **Project Information ...**

The following data can be entered into the 'Project Information' dialog box...

- **Start Date** or **Finish Date** – specifies when scheduling should start from or end
- **Schedule From** – to set whether to schedule from a start date or an end date
- **Current Date** - this should indicate today's date
- **Status Date** – used as the reporting date for progress
- **Calendar** - this is the 'base calendar' used to define overall project working times, (this is initially set to 'Standard' by default but can be changed later)
- **Priority** – used to decide which projects are delayed when levelling resources shared amongst several related projects, (range 0 to 1000, defaults to 500).
- **Enterprise Custom Fields** – where you can populate any special tag fields that your organisation has set up, (optional)

### 3.3 Project Statistics

Project statistics are a vital element in the planning and management of any project.

The statistics screen indicates when the project will finish, how much it will cost and how much progress is being, (although at this early stage many of the fields will either be blank or contain zero values).

To see the statistics screen...

- select the **Statistics** button in the above dialog box or...
- select **Project** and **Project Information** and then the **Statistics** button

You will now see the project statistics screen as below...

Project Statistics for 'Project1'				
	Start		Finish	
Current	Wed 13/04/05		Wed 13/04/05	
Baseline	NA		NA	
Actual	NA		NA	
Variance	0d		0d	
	Duration	Work	Cost	
Current	0d?	0h	£0.00	
Baseline	0d?	0h	£0.00	
Actual	0d	0h	£0.00	
Remaining	0d?	0h	£0.00	

Percent complete:

Duration: 0%      Work: 0%



**Because we have yet to save a baseline the Statistics screen will initially show no Baseline, Actual or Variance information.**

### 3.4 Project File Properties

In addition to the above information project files may also have properties associated with them which help to document and describe the plan. The details supplied here also provide a powerful way of searching for and locating a plan later on.

To see the 'Project Properties' dialog box ...

- select **File and Properties**

The following data may be entered in the **Summary** tab...

- a long **Title** describing the plan
- a **Subject** with which the plan is associated
- **Author, Manager and Company**
- a **Category** for grouping similar plans together
- **Keywords** to be used for subsequent searches - separate each with a comma
- **Comments** - any additional text covering any aspect of the project
- **Hyperlink base** – used to create shorter hyperlinks when the plan contains several hyperlinks to a common address

Name	Value	Type
% Compl...	0%	Text
Cost	£0.00	Text
Duration	0d?	Text
Finish	13/04/2005	Date
Start	13/04/2005	Date
Work	0h	Text
% Work ...	0%	Text

In addition there are tabs for general properties and also one for Custom fields as shown left...

- select the field **Name** from the left hand list
- type a text string or numeric value for the field in the **Value** box
- select the **Add** button to add this new field to the custom properties

### 3.5 The Base Calendar

A project's base calendar is the one that defines the overall working times for the entire plan. In addition to this, each resource you create will have its own individual calendar that will reflect the working times and downtime for that specific resource.

If you decide later that you need certain tasks to work outside of the base calendar you can also create and assign additional 'activity' calendars.

One of the most important tasks when setting-up a new project is to ensure that the base calendar is correctly defined. This means specifying the daily working hours for the plan and any non-working time, (e.g. weekends and public holidays). If this is not done then an accurate estimate of the projects duration and cost will not be possible.

The default base calendar is called 'Standard' and assumes the following...

- the working week starts on Monday and goes through to Friday
- there are two shifts - 08.00 to 2.00 (midday) and 13.00 to 17.00
- the above shifts are worked every week day throughout the entire calendar
- there are no Bank holidays or other statutory holidays



**Calendars in Project start on 1 January 1984 and run through to 31 December 2049.**

### 3.6 Altering the Base Calendar

In most cases the above assumptions do not reflect the way that most people work!

To change the base calendar...

- select **Tools** and **Change Working Time**

You will now see the 'Change Working Time' dialog box as shown below...

**Change Working Time**

For: Standard (Project Calendar)

Set working time for selected date(s)

Legend:

- Working
- Nonworking
- Edited working hours

On this calendar:

- Edits to a day of the week
- Edits to an individual day

Select Date(s):

April 2005						
M	T	W	Th	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Set selected date(s) to:


- Use default
- Nonworking time
- Nondefault working time

From: 08:00 To: 12:00

13:00 17:00

Buttons: Help, New..., Options..., OK, Cancel

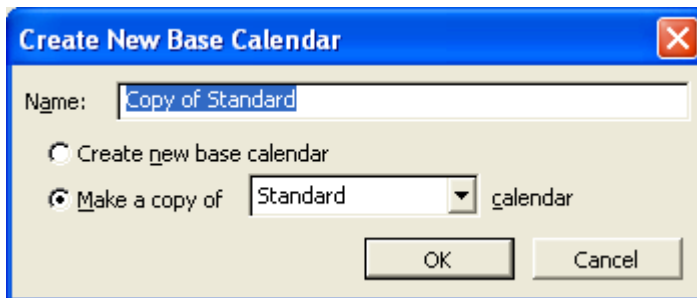
From the dialog box you can either create a new calendar or modify an existing one.



**If you create a new project calendar you will need to tell the various elements of Project to use this calendar instead of 'Standard'.**

To create a new calendar...

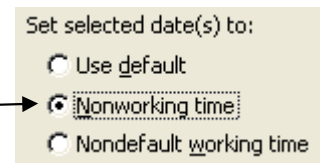
- select **Tools** and **Change Working Time**
- from the 'Change Working Time' dialog box select the **New** button...




- specify a name for the new calendar and whether to copy an existing calendar or make a new base calendar, (with default times)
- select **OK** when done

To change the working hours for *one day*...

- select **Tools** and **Change Working Time**
- **Click** on the required day square
- select **Nonworking time** to make it a holiday
- or...
- select **Use default** to make it a working day again
- or...
- simply modify the working hours to make it a non-default working time
- select **OK** when done



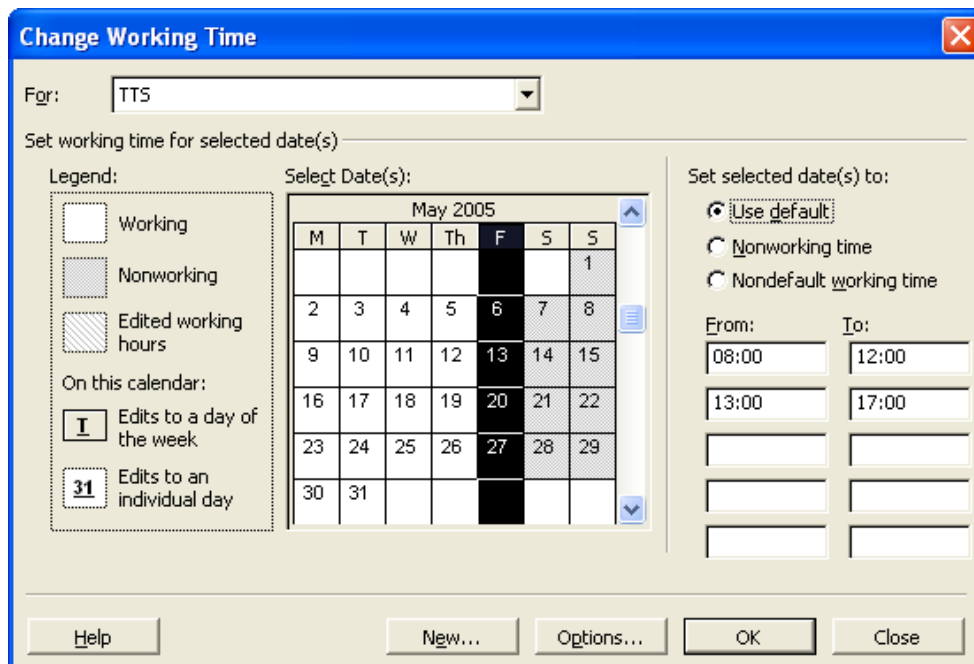


**Any days which are customised are shown with an underline beneath their number.**

**Non-working days are shown in dark grey whilst days with modified working hours are shown in hashed grey.**

To change the working hours for a specific day of the week throughout the entire calendar...

- **Click** in the grey day-of-week header (e.g. M, T, W etc.)...



The selected day of week will be highlighted throughout the entire calendar as shown above.

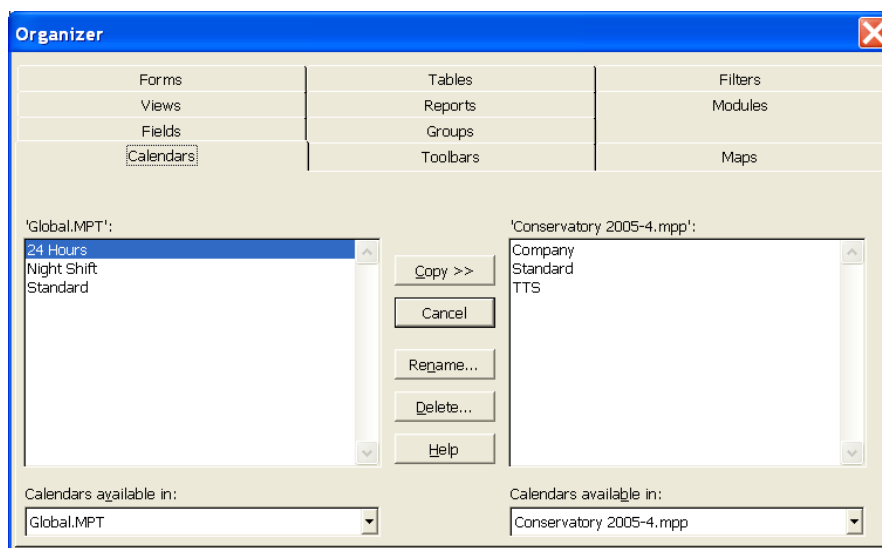
- alternatively, **Click + Drag** over several headers to change several days of the week at once

### 3.7 Making the Calendar Available to Other Projects

Any new calendars you create (or edit) are only available to the current project. However it is possible to copy them to an existing project or to the 'global' template, (which is used as the default for all new projects).

To copy a calendar to another project or the global template...

- select **Tools and Organiser...**



- from the 'Organiser' dialog box select the **Calendars** tab as shown above ...

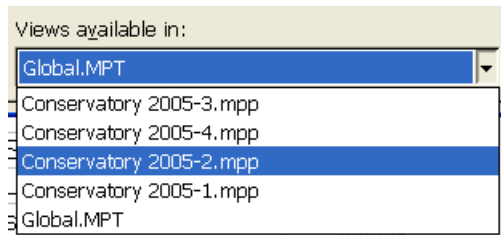
On the right you will see all the calendars available within your project, whilst on the left you will see those available within the global template.

To copy a calendar from the open file to global...

- select the relevant calendar and select the **Copy** button
- select **Close** when done

To select another project file to copy to...

- select the left hand drop-down list...



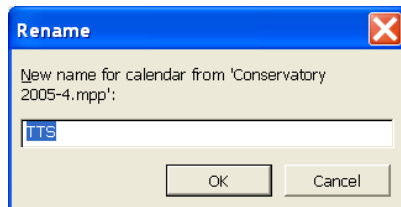
- select the desired project file



**Only project files which are open are listed.**

To rename a calendar...

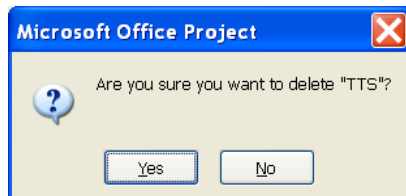
- select the relevant calendar and select the **Rename** button



- type a new name and **OK** when done

To delete a calendar...

- select the relevant calendar and select the **Delete** button



- select **Yes** to permanently delete it



**The Organiser dialog is extremely useful for copying, rename or delete and unwanted Calendar.**

### 3.8 Setting Default Hours per Day and Week

When you start entering task durations into Project you will discover that you can do this in a number of ways. For example you can specify task duration in months, weeks, days, hours or minutes. Whilst hours and minutes are precise measurements, days and week are not, (months are equal to 20 days by default). For example, a day could be defined as 24 hours, 12 hours or 8 working hours.

Before proceeding therefore, we should specify precisely what we mean by a day or a week so that Project can convert these durations to hours, (its basic unit of measurement).

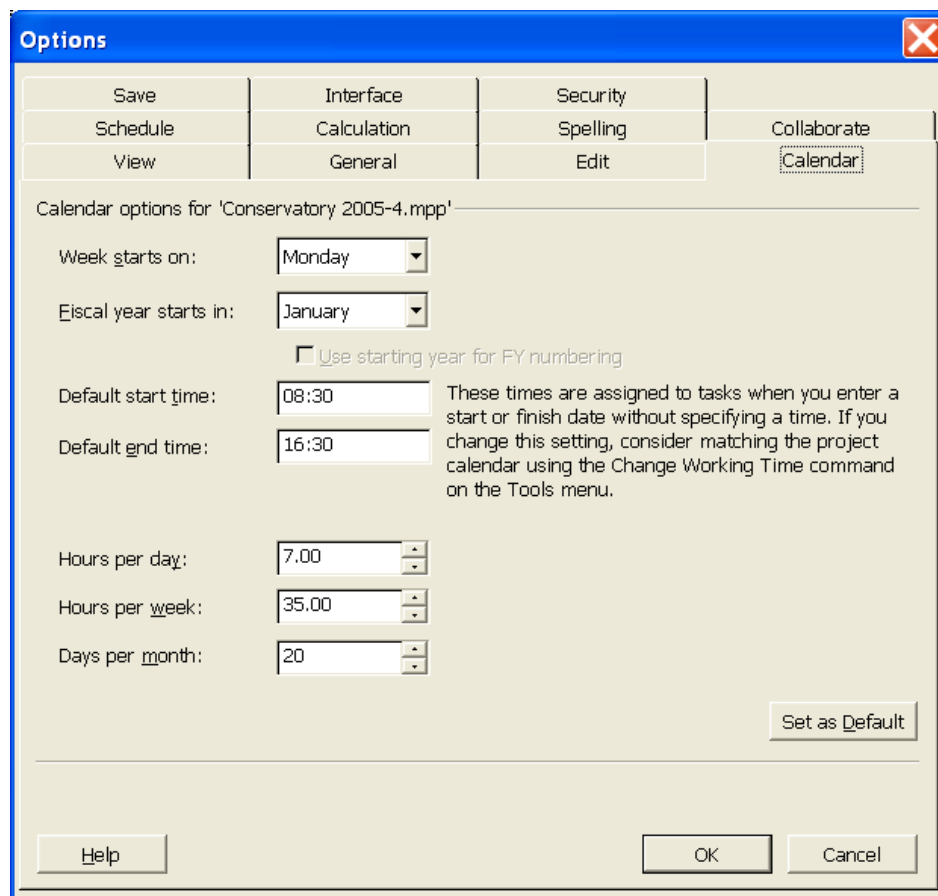
If this is not done then durations will not align with the available time in the calendar and an accurate estimate of project timescales and costs will not be possible.

### 3.9 Altering the Hours per Day and Week

To specify the hours per day and hours per week...

- select **Tools** and **Options**
- select the **Calendar** tab from within the 'Options' dialog box

You will now see the 'Options' dialog box as shown below...



- specify all the relevant calendar settings for your plan including the 'Hours per Day' and 'Hours per Week'

To make these settings the default for all subsequent projects...

- select the **Set as Default** button and **OK**



**Many companies have different working hours for certain days of the week, (e.g. an early finish on Friday). Whilst you can specify any working pattern precisely in Project this can lead to problems of 'overspill' or 'under-spill' later on, (e.g. a days work won't fit into a short Friday and spills into the following Monday).**

**In this case it is often better to specify the hours in a day as an average taken over the whole week, (e.g. 7.4).**

## Setting Other Project Options

Whilst in the 'Options' dialog box you will notice a number of other tabs which can be used to customise the way Project works.

For example, the **View** tab can be used to set a wide range of view options...



**You should investigate all the possible options available from the 'Options' dialog box - use the *Help* button to obtain assistance on any option which is not clear.**