

1. Setting-up a New Project

Whilst it is perfectly possible to create a new project from scratch using all the default settings you will find that they do not always reflect your particular project environment. The following sections will show how to check (and if necessary) change key Project settings and parameters.

1.1 Creating a New Project

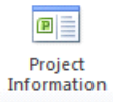
Whenever you start using Project a new blank project plan is opened by default. However, if you want to create a new project explicitly...

- Select **File** and **New** or...
- Press **Ctrl + N**

You will now be able to create a new project file (as described in Section **Error! Reference source not found.** previously).

1.2 Project Information

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

- To view the Project Information dialog box select the  button on the **Project** tab...

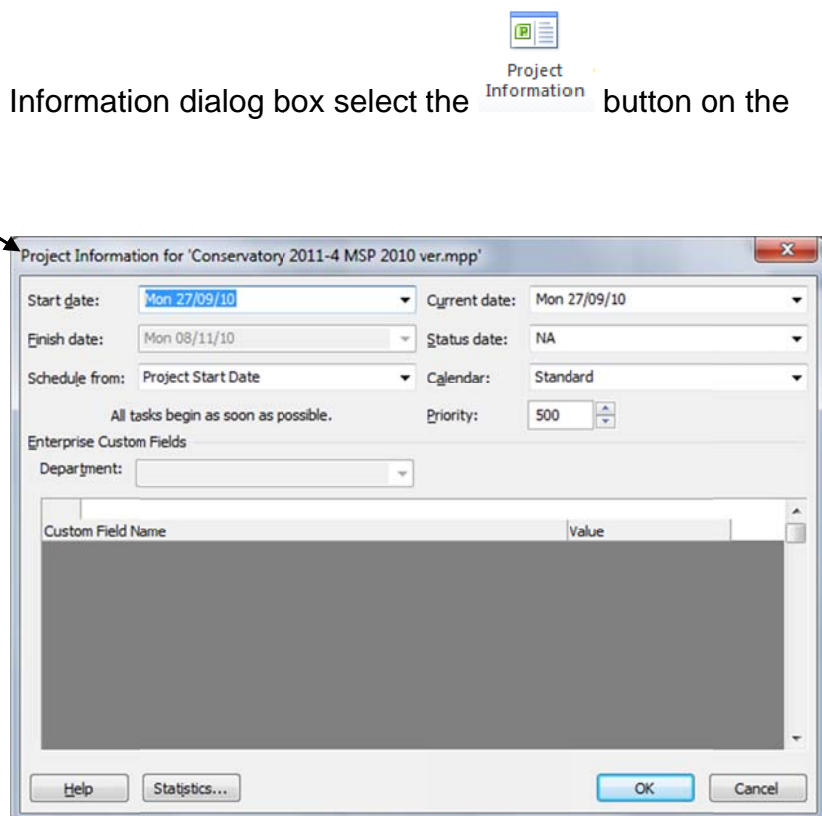
Current project name

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 – used as the default reporting date for progress

Status Date – used as an optional reporting date for progress



Project Information for 'Conservatory 2011-4 MSP 2010 ver.mpp'

Start date: Mon 27/09/10 Current date: Mon 27/09/10

Finish date: Mon 08/11/10 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Enterprise Custom Fields

Department: [Dropdown]

Custom Field Name	Value

Help Statistics... OK Cancel

Calendar – select 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 – optional custom fields that your organisation may have set up for internal use

1.3 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 made (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 Project Information dialog box (above)

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

	Start	Finish	
Current	Mon 27/09/10	Mon 08/11/10	
Baseline	NA	NA	
Actual	NA	NA	
Variance	Od	Od	
	Duration	Work	Cost
Current	30.13d	126h	£1,260.00
Baseline	0d	0h	£0.00
Actual	0d	0h	£0.00
Remaining	30.13d	126h	£1,260.00
Percent complete:			
Duration:	0%	Work:	0%

In the above example we haven't yet taken a baseline¹ or tracked any progress so the 'Baseline' and 'Actual' fields show zero values.

1.4 Project File Properties

In addition to the above information project files also have properties associated with them which help to document and describe the plan. To see basic properties...

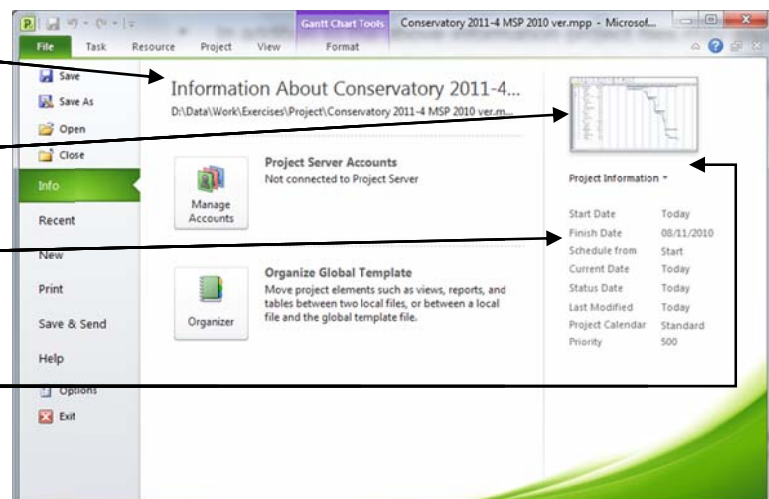
- Select the **File** menu and the **Info** area as shown below...

Current file

Preview of plan

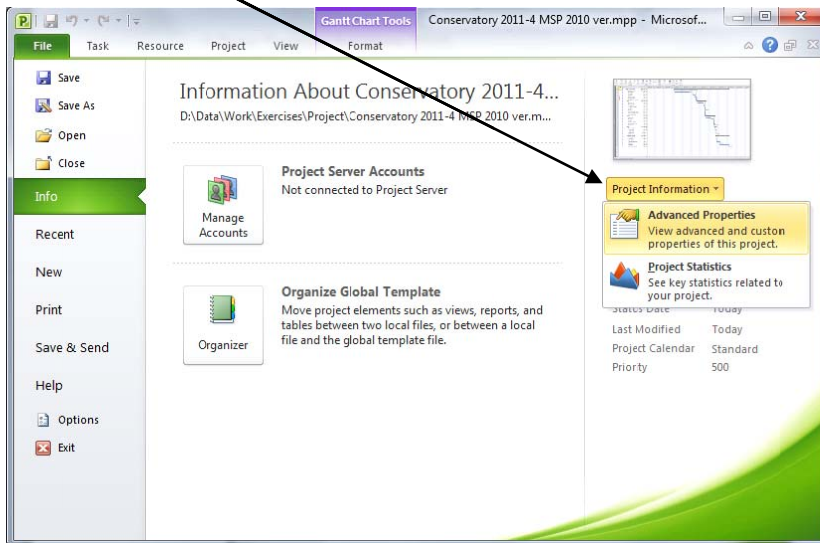
Basic file properties

Further properties
(see below)



¹ A baseline is a copy of key project parameters (such as duration, cost and work) which is usually taken just before launch and which serves to compare what we expected to achieve with what was actually achieved.

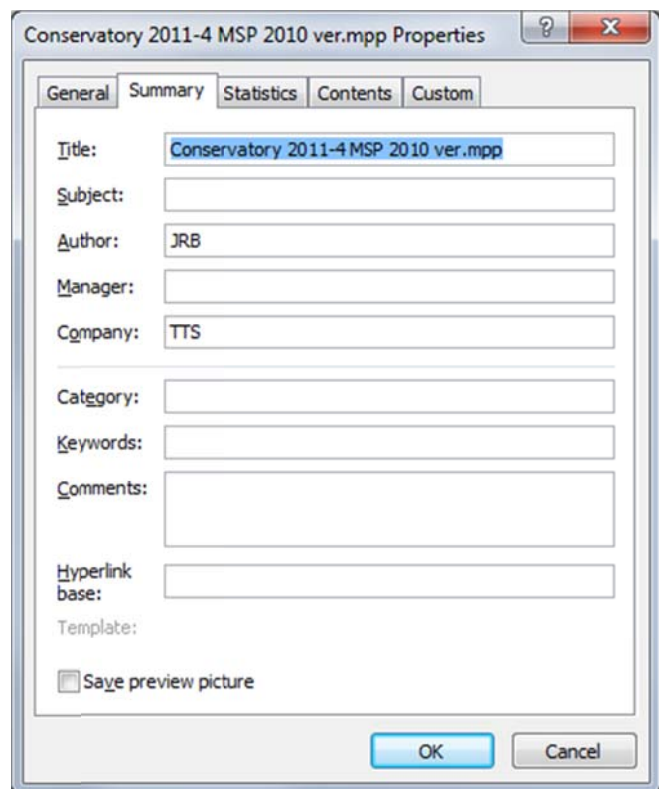
If you want to see more properties (and add your own) select the Project Information button here



- Next select the 'Advanced Properties' option and you will see the following dialog...

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

- 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
- **Save Preview Picture** – check this box if you would like to see a miniature preview when you open the file (select the **Preview** option from the **Views** dropdown in the **Open** dialog box as shown below)



1.5 About Calendars

The 'Project Calendar' defines the overall working times for the entire plan. It is the bedrock on which the plan is built and should be set up to match the anticipated working patterns from the start (it causes a lot of headaches if you do it later!)

When you first start Project there are a small number of calendars already prepared to suit common situations (standard office hours, night shifts or 24 hour working). These calendars are referred to as 'Base Calendars' and are used (as their name implies) as the basis for custom working calendars. You can have as many calendars as you like but only one may be used as the working project calendar (i.e. the one that applies to the current project).

In addition to the project calendar, each human resource you define will have its own individual 'Resource Calendar'. Again these are copied from an existing base calendar and reflect the working times for a specific human resource (physical resources are considered to be available 24/7).

Changes to a resource calendar can affect the duration of activities (activities with human resources assigned will take longer if that resource is not available for work, for example). By default resource calendars are simply a copy of the project calendar but they can be based on any other calendar, if needed (such as a calendar with specific shift patterns, for example).

In this way you can setup a number of base calendars to reflect a wide range of working patterns and then assign one to the current project and others to specific resources.

Finally, you can also assign 'Activity Calendars' to key activities. As usual these are based on an existing calendar and are usually used when you want to allow work to be carried out outside the normal hours defined in the project calendar.

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



All calendars in Project start on 1 January 1984 and run through to 31 December 2049.

1.6 Checking the Base Calendar

As mentioned above, one of the most important duties when setting-up a new project is to ensure that the project calendar is correctly defined.

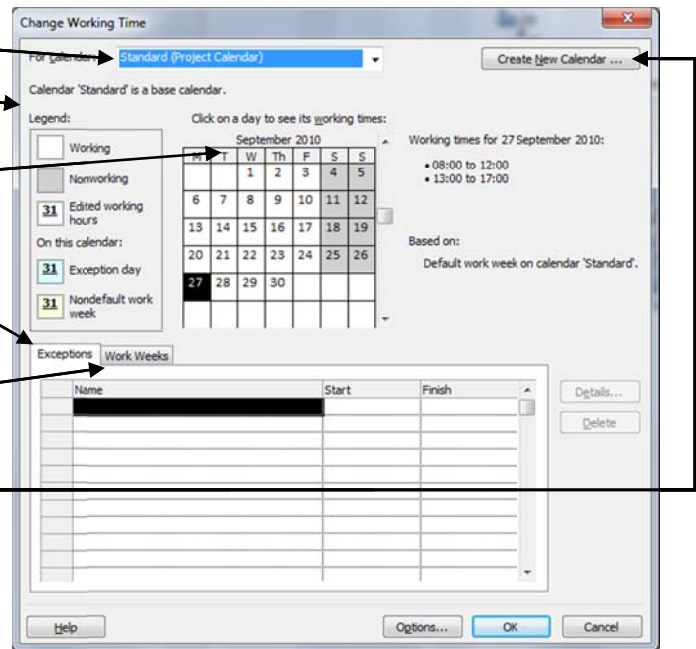
To check the base calendar...



- Select the **Change Working Time** button from the **Project** tab

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

- Current calendar name
- Legend (non-interactive)
- Current calendar month (with working hours for today to the right)
- Exceptions tab (for holidays and statutory non-working days)
- Work Weeks tab (for changing the hours in a standard working week)
- Create New Calendar button (for your own custom calendars)

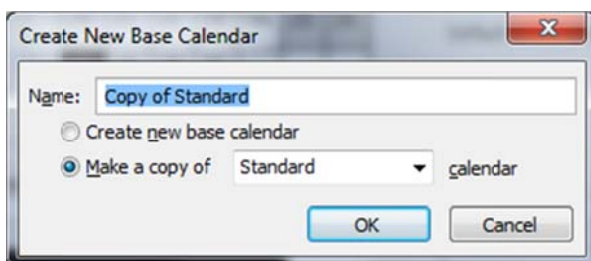


From this dialog box you can create a new base calendar from scratch or modify an existing one.

1.7 Creating a New Calendar

Whilst it is perfectly possible to modify the Standard calendar many users prefer to create their own custom calendar. To create a new calendar...

- Follow the above steps and
- From the Change Working Time dialog box select the **Create New Calendar** button...



- Specify a name for the new calendar
- Specify whether to copy an existing calendar or make a new base calendar (with default times as in 'Copy of Standard')
- Select **OK** when done

1.8 Setting Exceptions

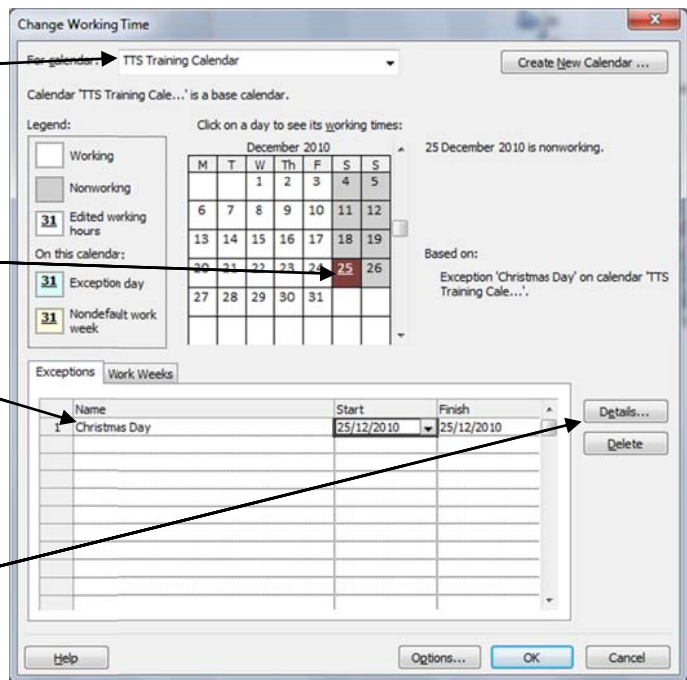
Exceptions are days when either no work is done or when the working times are different from the default. When setting up calendars it is often easier to define these first.



- Select the **Change Working Time** button from the **Project** tab

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

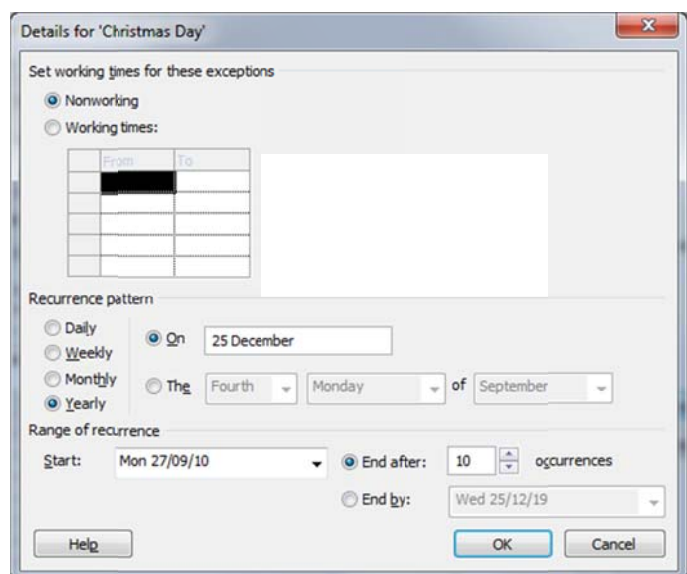
- Select the correct calendar from the drop-down list (this must be done every time until we set it as the project calendar later)
- Navigate to the day that you want to make an exception and select it
- In the Exceptions tab specify a name for the exception
- Select OK to create an exception for that day (non-working in this case)
- Unwanted exception may be deleted by selecting them (on their row number) and selecting **Delete**



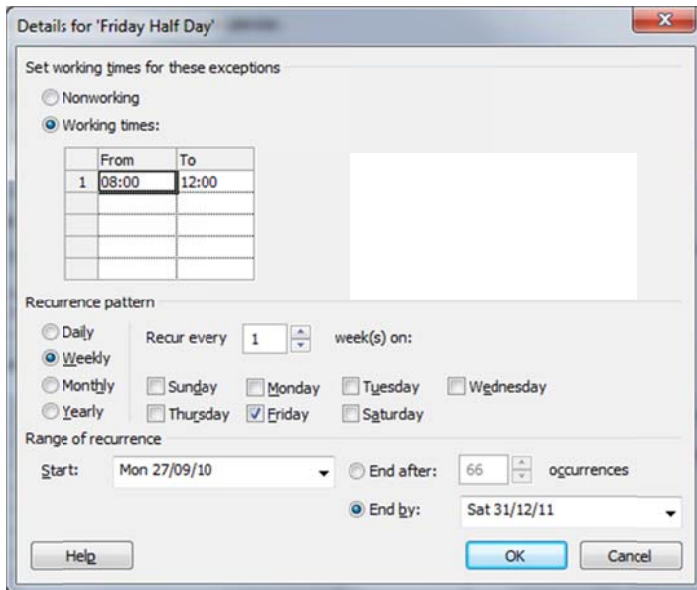
The selected day (or period) will now be marked as an 'exception' and no work may be done during that period by default. To change the details of an 'exception'...

- **Double Click** the description of the exception (or select it first and then **Click** on the **Details** button)
- The example right shows how to set Christmas Day as a holiday for the next 10 years.

The default setting for an exception is 'Nonworking' but this can be changed to suit you.



The example below shows how to set every Friday (up to the end of 2011) as a half-working day (morning shift only worked)...



- To add a working shift, simply type the start and finish times in
- To delete a working shift, select the ID number next to the working time and press **Delete**
- Select **OK** when done

In the 'Change Working Time' dialog, non-working exceptions are usually coloured a dark blue whilst working exceptions are shaded with a lighter blue.

To rename an exception...

- Click on the exceptions name to select it and once again to enter 'edit' mode
- The cursor should now be placed in the description and may be used to edit the name
- Press **Return** when done

1.9 Setting Working Time

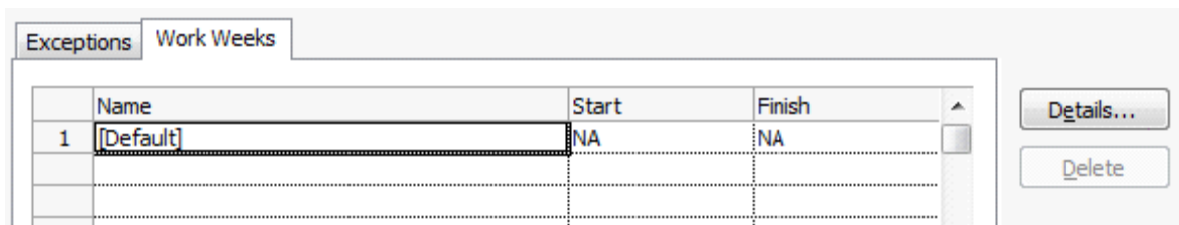
Although you could simply adopt the standard working times most people opt to change the daily working hours (and non-working time) to reflect their own organisation.

If this is not done with care an accurate estimate of the project duration, cost and work will not be possible.

To set working time for a calendar...



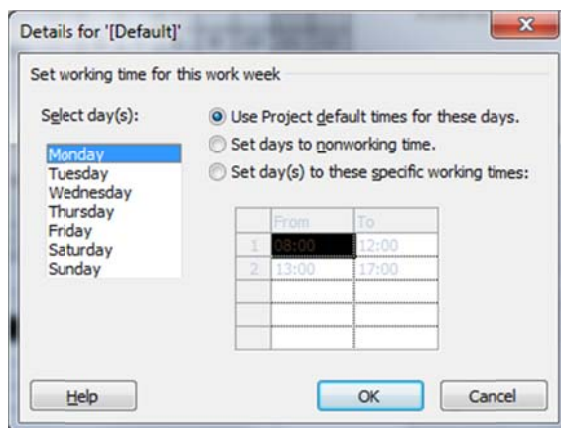
- Select the **Change Working Time** button from the **Project** tab
- In the 'Change Working Time' dialog box select the appropriate calendar from the list at the top
- Now select the 'Work Weeks' tab as shown below...



- To start with there should be just one default working pattern defined (although others can be created)

Note that the default working week automatically applies to the entire calendar (start and finish are both set to 'NA').

- To check (or change) the default working pattern ensure it is selected and then select the **Details** button on the right
- You will now see the 'Details' dialog box showing the shift patterns associated with the default, as shown below...



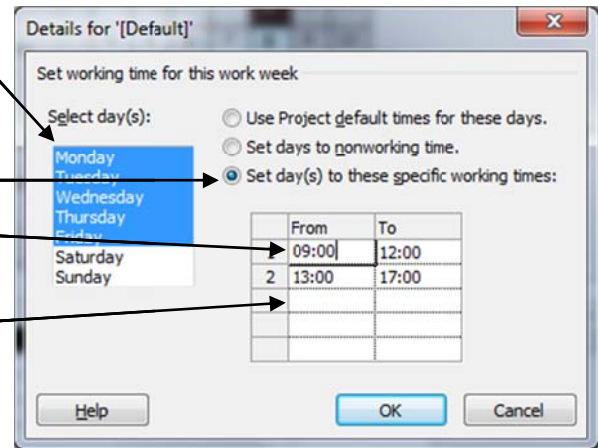
Up to 5 shifts can be specified here.

You have a number of options here...

1. Setup a custom shift pattern for one (or more) days of the week
2. Set certain day(s) of the week to be non-working
3. Set all days of the week to use a custom shift pattern
4. Add new shifts each day (or reduce them)

To change the default working pattern for the entire week...

- Click and Drag over the days of the week (they should be highlighted in blue)
- Select the option to 'Set day(s) to these specific working times'
- Next make changes to the existing two-shifts or...
- Add an extra shift by typing new times beneath the existing ones or...
- Delete unwanted shifts by selecting them and pressing **Delete** on the keyboard
- Select **OK** when done



The example shows a revised shift pattern for Monday through to Friday starting at 09:00 (instead of 08:00).

To create a custom shift pattern...



Change Working Time

- Select the **Change Working Time** button from the **Project** tab
- In the 'Change Working Time' dialog box select the appropriate calendar from the list at the top
- Now select the 'Work Weeks' tab and type a name for the new custom shift pattern below the 'Default' one
- Next specify a 'Start' and 'Finish' date for the pattern

Exceptions		Work Weeks	
	Name	Start	Finish
1	[Default]	NA	NA
2	Members Week	03/10/2011	07/10/2011

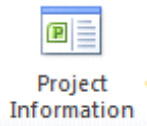
The example above shows a new shift pattern called 'Members Week' which applies to the first week in October 2011.

To set the specific working pattern for this new shift select the **Details** button and follow the instructions above.

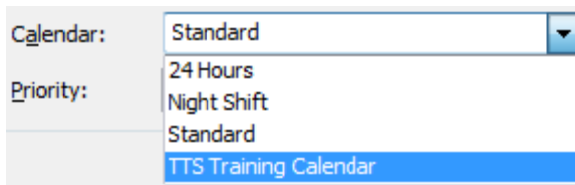
If you want to check the working times for a specific day open the 'Change Working Time' dialog, select the day of interest and the working times are shown next to the calendar.

1.10 Setting the Project Calendar

NB: once you have created your new project calendar you still need to tell Project to start using it!



- To do this select the **Project Information** button on the **Project** tab
- In the 'Project Information' dialog drop-down the list next to 'Calendar' and select yours...



- Select **OK** when done

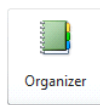
You will see an instant effect on the schedule if you have used automatic task scheduling (see Section Error! Reference source not found.).

1.11 Making the Calendar Available to Other Projects

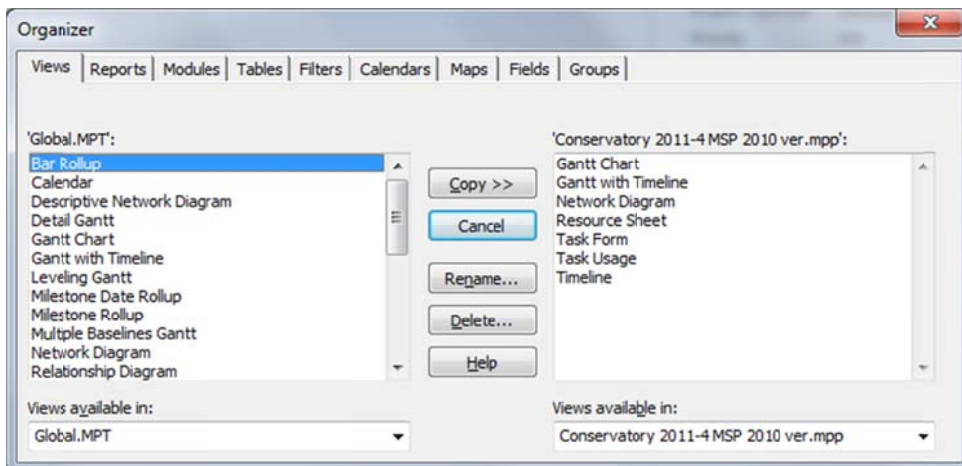
Any new calendars you create (or changes to existing ones) are only available to the current project. However it is possible to copy them to any existing project or to the 'global' template (which is used as the default for all new projects).

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

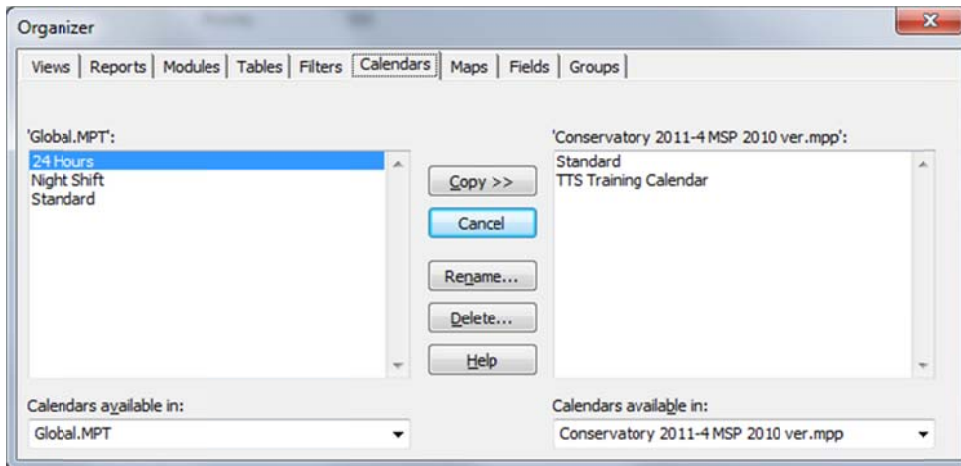
- Select the **File** menu and the **Info** category



- In here select the **Organizer** button to see the 'Organizer' dialog



- In the Organiser dialog box select the **Calendars** tab as shown below...



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 files which are open in Project are listed here.

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, renaming or deleting Calendars and other customisable Project elements (such as tables, for example).

1.12 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 weeks are not (months are equal to 20 days by default).

For example, a day could equally be defined as 24 hours, 12 hours or 8 working hours. You must therefore decide exactly how long a standard working day will be. Although you can specify any number of hours you like (including fractional hours) the most important thing is to ensure that your choice matches the current working pattern, as specified in the calendar above. 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.

Once set, Project converts days and weeks into hours (its basic unit of measurement) for all its 'internal' calculations.

Because you can customise the calendar to reflect complex working patterns Project doesn't attempt to guess what a standard day will be – you must tell it!

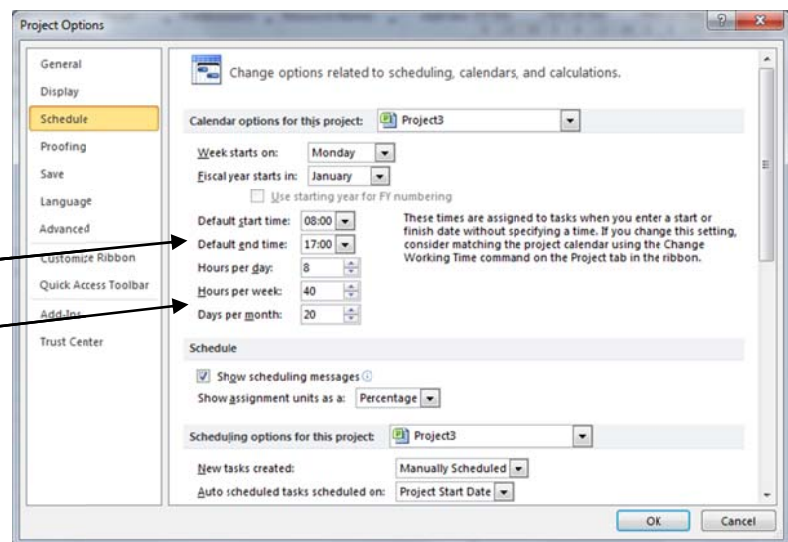
1.13 Specifying the Hours per Day and Week

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

- Select the **File** menu and **Options**
- Next select the 'Schedule' category from the left hand list...

Specify all the relevant calendar settings for your plan (so they match your project calendar) including...

- 'Default start and finish times'
- The 'Hours per Day' and 'Hours per Week'
- Select **OK** when finished



Whilst it is possible to have very complex calendars and working patterns it is much easier to manage a project with simple ones!