

SETTING UP A PROJECT DOCUMENT

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SUPPLYING INFORMATION FOR A NEW PROJECT

Setting up a new Project document correctly from the beginning will help make your use of Microsoft Project 2003 much easier. Before you enter the first task in a new project, it's a good idea to examine several settings and make any required changes to them. Although there are no defined rules for doing this, by following the steps outlined in this chapter, you will be able to create a more accurately calculated schedule.

You generally use most of the default settings in Microsoft Project 2003 to schedule tasks. Microsoft Project 2003 also allows flexibility and adaptability to accurately reflect the actual workings of each individual project. You can change many of these settings after tasks and resources have already been entered into the project. However, by addressing these issues up front, you are guaranteed to create a schedule that is based on logic and calculated reason.

NOTE

Although you can address the preliminaries of a project in any order, the order in which the topics are presented in this chapter is the order recommended when you begin developing your first project.

You should understand the working conditions in a project, including the working calendar and holidays, before attempting to set up the project. Microsoft Project 2003 calculates the schedule for activities based on this information, so you should outline this information before you begin using Microsoft Project 2003 to schedule tasks.

When you begin working with Microsoft Project 2003, you typically start by setting up the environmental working options. Next, you define the working time calendar, considering working hours and nonworking time. After you set up a calendar, you might want to print it for review at a later time. You might also want to use the same calendar for other projects; to do this, you need to use the Organizer, which is described later in this chapter (see the section titled “Working with the Organizer,” or you could also use a template upon which to base new projects.

Microsoft Project 2003 includes two wizards to assist in the process of setting up your project: the New Project Wizard and the Calendar Wizard. Using wizards in Microsoft products makes the setup process easy and complete. You are strongly encouraged to take advantage of these new wizards to expedite your setup time and allow you to focus on defining the scope of work for the project.

When you start a new project, you must consider whether you want the project to be scheduled from a specific start date or scheduled backward from a predetermined finish date. It is not possible to do both. When Microsoft Project 2003 calculates the forward-scheduling of tasks, it considers many factors, including the duration of the tasks, the base calendar selected, the settings set by the user, dependencies defined between activities, the calendar of the resource assigned, and, if one is created, a specific task calendar that is assigned to the activity. When Microsoft Project 2003 calculates the backward-scheduling of tasks, it does

essentially the same thing it does when forward-scheduling, except that it calculates backward from the project's fixed end date.

In addition to calendar information, you need to provide summary information; Microsoft Project 2003 inserts this information into many of the reports it can generate, and this information enables Microsoft Project 2003 users to search for specific contents of files saved on your computer. You enter this summary information into the Properties dialog box, which you access by selecting File, Properties. The following sections describe how you input data into the Project Information and Properties dialog boxes.

USING THE PROJECT INFORMATION DIALOG BOX



To start a new file, choose File, New or click the New button on the Standard toolbar. Microsoft Project 2003 now displays the options available to you in a sidepane called “New Project.” You then need to select whether you want to create a new project from a template or start a blank project. Selecting Blank Project automatically initiates the Project Guide to guide you through the process of creating a new project. The pane now displayed is the Tasks Pane, which is part of the default Project Guide. Each option is designed for you to select each option in turn and be “guided” through the process of creating your new project.

Selecting Define the Project, for example, allows you to enter the start date of your project without ever having to manually select commands from the menu.

- After each option has been invoked in the Tasks Pane, the Project Guide will allow you to move on to other aspects of project creation. After you have worked your way through each section of the guide, you will have created your project plan. The Project Guide makes the whole process intuitive and easy for novice users to get up and running quickly with Microsoft Project 2003. For more information on the Project Guide, see the section titled “Using the New Project Wizard” on p. 85.

Of course, if you are a more experienced user you may prefer to simply access the Project Information dialog box.

You use the Project Information dialog box to record basic information about a project, such as the project start date and the base calendar to use for scheduling. To access the Project Information dialog box at any time, you choose Project, Project Information.

Figure 3.1 shows the Project Information dialog box that appears in the Standard edition of Microsoft Project 2003. Figure 3.2 shows the Project Information dialog box that appears in the Professional edition of Microsoft Project 2003.

Figure 3.1
The Project Information dialog box defines the start date for a project.

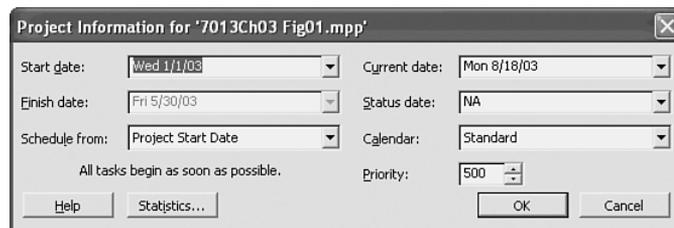
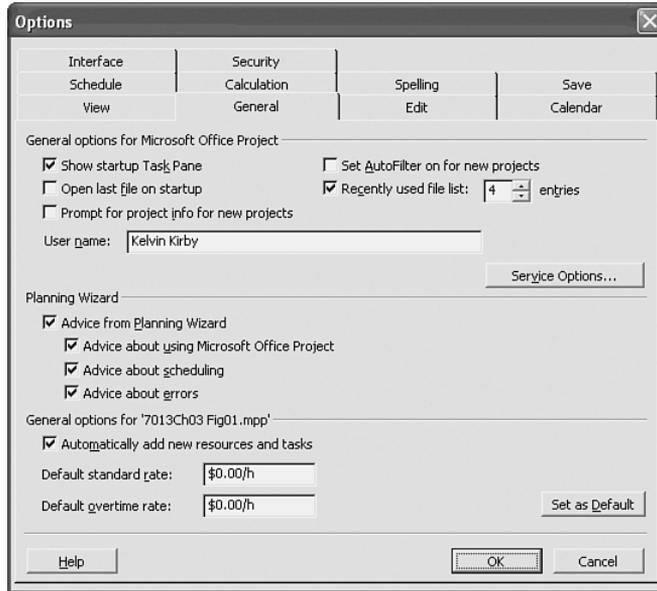


Figure 3.2

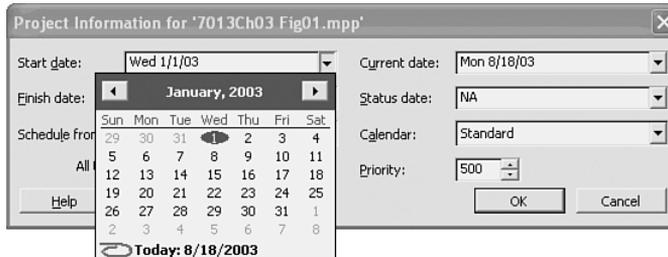
The option to have the Project Information dialog box appear when you open a new project is available under the General tab of the Options dialog box.

**TIP**

If the Project Information dialog box does not display when you open a new project, choose Tools, Options. On the General tab, mark the Prompt for Project Info for New Projects check box. Then start a new file; the Project Information dialog box should now appear (see Figure 3.3).

Figure 3.3

The start date of the project should be defined from within the Project Information dialog box, not the start field of the first task of the project.



The fields in the Project Information dialog box are as follows:

- Start Date, Finish Date, and Schedule From**—The Schedule From drop-down selects whether the project forward-schedules from a start date or backward-schedules from a finish date. To define a specific date for a project to start, you can type the date in the Start Date text box or click the Start Date drop-down button to choose a date on a calendar. If you must schedule a project to finish on a specific date, select the Schedule From list box and choose Project Finish Date. You can then type a specific date in the Finish Date text box. This will move the project to schedule backward from this date.

- **Current Date and Status Date**—Microsoft Project 2003 uses the information in these fields to perform several date-related calculations. If you leave the Status Date field set to NA (for example, if you want to see the values in the Earned Value fields calculated up through and including the current date or a date you specify), Project uses the date in the Current Date field as the status date. This date is also used in the Complete Through field in the Update Project dialog box, as well as in the placement of progress lines in the Gantt Chart view. See the section “Changing the Current Date and Status Date Text Boxes,” later in this chapter, for more information about when and how you might want to use this field.
- For information on telling Microsoft Project 2003 that work on the current project is complete through a specific date, see “Analyzing Progress and Revising the Schedule,” p. 555.
- **Calendar**—You can use the Calendar list box to select a different base calendar for scheduling the project. The section “Scheduling with Calendars,” later in this chapter, explains when you should use the default base calendar (Standard) and when you should consider using a different calendar.

NOTE

If the base calendar you want to use is defined in a different project file from the one you’re currently using, you must use the Organizer to copy that calendar into the current project file before you can select it (see the section “Working with Calendars,” later in this chapter).

- **Priority**—When you are sharing a pool of resources across multiple projects, you can identify which project has the highest priority by changing the Priority field in the Project Information dialog box. You can set this project level priority between 0 and 1000 (1000 being the highest priority).
- When you have a resource that is assigned too much work, and they don’t have enough time in which to do the work, then the resource is said to be *overallocated*, and you can have Microsoft Project 2003 attempt to resolve the problem. For more information, see “Resolving Resource Assignment Problems,” p. 401.

UNDERSTANDING THE START AND FINISH DATE TEXT BOXES

When you’re starting a new project document, you enter either a start date or a finish date into the Project Information dialog box to function as an anchor point for scheduling the tasks in the project. Microsoft Project 2003 computes the other date. You cannot specify both a start date and a finish date.

If you enter the start date, Microsoft Project 2003 schedules the first task in the project to begin at that time and calculates the project’s finish date based on that starting date and the sequence of tasks that come after the first task. New tasks that are added begin as soon as possible when you schedule from a start date.

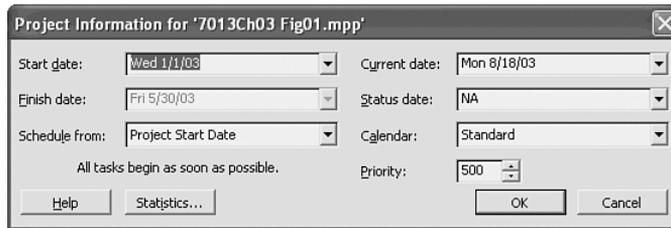
If you enter the finish date, Microsoft Project 2003 schedules the tasks from the end of the project first and works backward. The final task is scheduled to end by the finish date; the

task that precedes the final task is scheduled to end in time for the final task to begin, and so on. By the time Project schedules all tasks to end in time to meet the finish date requirement, the program has calculated a start date (that is, the date by which the first task must begin for the project to be completed by the specified finish time). New tasks that are added begin as late as possible when you schedule from a finish date.

You can use the Schedule From list box to change a project's schedule as often as you like. If you want to see when a project must start in order to finish by a deadline date, you can change the Schedule From option to Project Finish Date and enter the deadline date. When you choose OK, Project recalculates the schedule, including a new start date. You can then view the Project Information dialog box again to see what the required start date is, given the new finish date deadline. While in the Project Information dialog box, you can switch back to scheduling from a fixed start date.

To select a start date or finish date, you can either type the date or click the drop-down button to select a date from a calendar (see Figure 3.4). To select a date in the current month, you simply click that date. To select a date in a different month, you use the left and right arrows to select a different month and then click the date.

Figure 3.4
The Project Information dialog box allows the selection of dates via the pop-up calendar.



When you're managing a project, it's best to schedule forward based on a start date. If you schedule the project based on a fixed finish date, all activities must flow backward based on durations, linkages, and the calendars assigned; this is fine until you begin tracking the project. When you schedule from a fixed finish date, the start date is based on the actual time needed to complete each phase. What's wrong with this picture? Because both the start and finish dates are fixed, the schedule cannot expand or contract.

Also, scheduling from the finish date assumes that there is no project buffer, or extra time added to the end of the project, to allow for delays in completion of the project, unless you take that into consideration in selecting the finish date from which to schedule backward.

When you encounter a date field, you can use the built-in pop-up calendar to select a date.

NOTE

If you change your mind about the date you selected, you can click the area designated Today at the bottom of the calendar to immediately return to today's date. This closes the calendar pop-up. Of course, pressing Esc closes the window entirely, without saving the changes you've made.

CHANGING THE CURRENT DATE AND STATUS DATE TEXT BOXES

The computer's internal clock initially determines the date listed in the Current Date text box. Changing this text box has several implications:

- The date determines the location of the dashed (current) date line on the Gantt Chart view time line.
- The current date appears in the header of the Project Summary standard report as an As Of date. You also can display the Current Date text box in headers or footers on other reports by typing the appropriate code in the header or footer definition.
- You can customize Project to start new tasks based on the current date instead of on the project's start date. You do so by selecting Tools, Options, selecting the Schedule tab, and changing a setting next to New Tasks: Start on Project Start Date or Start on Current Date.

The Current Date can be used for benchmarking the progress of tasks, but you can use an alternative date for this as well. If you specify a date in the Status Date field in the Project Information dialog box, this is the date Project uses for placing the progress lines in the Gantt Chart view. In addition, if there is a date in the Status Date field, Project uses this date when calculating the Earned Value fields and for tracking purposes in the Update Project dialog box.

To change the Current Date field or enter a date in the Status Date field, select the field and type the date or click the drop-down arrow to select a date from a calendar pop-up.

DISPLAYING THE PROJECT STATISTICS DIALOG BOX



You use the Statistics button at the bottom of the Project Information dialog box to display the Project Statistics dialog box (see Figure 3.5). You can also display this dialog box by clicking the Project Statistics button on the Tracking toolbar.

Figure 3.5
The Project Statistics dialog box gives a quick summary of the status of a project.

	Start	Finish	
Current	Wed 1/1/03	Wed 8/14/02	Fri 5/30/03
Baseline			Fri 1/10/03
Actual	NA		NA
Variance	100d		100d
	Duration	Work	Cost
Current	108d?	4,616h	\$102,432.00
Baseline	108d?	4,616h	\$102,432.00
Actual	0d	0h	\$0.00
Remaining	108d?	4,616h	\$102,432.00
Percent complete:			
Duration:	0%	Work:	0%
			Close

The Project Statistics dialog box displays summary information about a project. You cannot manually change the data in this dialog box; you can only view and print it.

NOTE

You can use the Project Summary report (in the Overview category) to print out the project statistics. Reports are accessed from the View menu.

The Project Statistics dialog box shows the current, or currently scheduled, values for five project parameters: the start date, finish date, total duration, work, and cost. If you have saved the baseline copy of the schedule, the baseline values also are displayed, for comparison.

When work is actually performed on the project and progress on tasks is recorded, the information in the Actual row is updated. The percentage complete of the duration and work of the project are shown at the bottom of the dialog box, in the Percent Complete section.

To close the Project Statistics dialog box, click the Close button.

USING THE PROPERTIES DIALOG BOX

In the Properties dialog box, you can view and edit a number of options that describe a project. To open the Properties dialog box, choose File, Properties. The Properties dialog box has five tabs; the Summary tab is the default.

NOTE

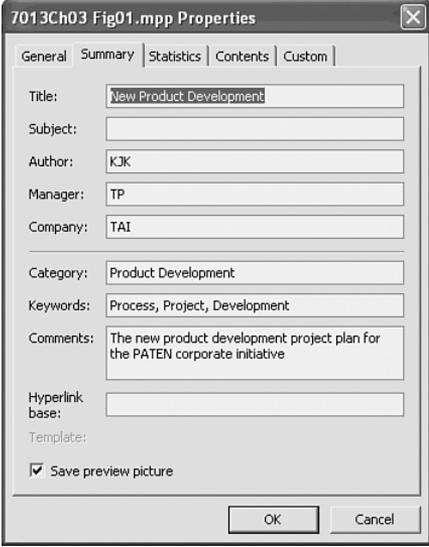
You can display information from the fields in the Properties dialog box—especially fields from the Summary tab—in the header or footer area of printed views or reports for a project. See Chapter 13, “Printing Views and Reports,” for more information.

THE SUMMARY TAB

In the Summary tab of the Properties dialog box (see Figure 3.6), you can supply descriptive information about a project and the people associated with it. You can include the options at the top of the tab (Title, Subject, Author, Manager, and Company) in reports as header or footer text. The options Category, Keywords, and Comments are useful when you’re searching through previously created project files on your hard disk. You can use the Hyperlink Base option to indicate the main address to the hyperlinks you have in your project. This can be a link to another file on your computer or server or a link to a location on the Web.

Figure 3.6

The Summary tab of the Properties dialog box presents descriptive options that are useful in reports and for searching for files to open.



7013Ch03 Fig01.mpp Properties

General Summary Statistics Contents Custom

Title: New Product Development

Subject:

Author: KJK

Manager: TP

Company: TAI

Category: Product Development

Keywords: Process, Project, Development

Comments: The new product development project plan for the PATEN corporate initiative

Hyperlink base:

Template:

Save preview picture

OK Cancel

To change any of the options on the Summary tab, select its text box and type an entry. Press the Tab key after you have finished typing the entry to move to the next option. Except in the Comments list box, pressing the Enter key on this tab selects the OK button and closes the dialog box.

If the newly created project originated from a template, the template name appears at the bottom of the dialog box.

You can select the Save Preview Picture check box to have Project save a thumbnail sketch of the current view when you save the file. You can browse these preview pictures when you search for files by using the File, Open command. The Save Preview Picture check box is not selected by default.

If you have trouble locating files in the future, you can use the Open dialog box to search for words entered in the fields of the Summary tab to find the needed file.

THE GENERAL TAB

The General tab of the Properties dialog box describes the file that stores the project document. It provides statistics about the project file: the name, type, location, and size of the file, as well as the dates when the file was created, last modified, and last opened. This tab is blank until the document is saved as a file.

THE STATISTICS TAB

The Statistics tab of the Properties dialog box provides useful statistics about your work with the project document, including when it was created, last modified, last accessed, and last printed. It also shows who last saved the file, which is useful for shared files in a

workgroup. The Statistics tab also shows how many times the document has been revised and the total amount of computer time spent editing the file.

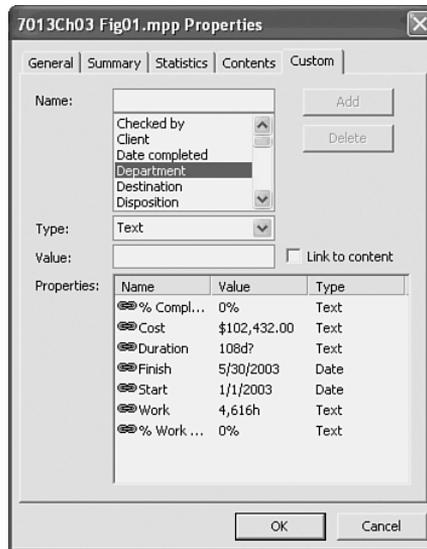
THE CONTENTS TAB

The Contents tab of the Properties dialog box displays the most commonly reviewed statistics about the current project schedule: the start and finish dates; the scheduled duration, work, and cost; and the percentage completed for both duration and work. The Contents tab displays summary statistics about the project schedule.

THE CUSTOM TAB

With the Custom tab of the Properties dialog box you can add additional properties to a file. Then, you can search for files by the values of these properties. Based on the information in Figure 3.7, for example, you could search for all projects that have Marketing in the Department Value field. The bottom row in the Properties list box shows that a property named Department has been created for this document, with the text value Marketing.

Figure 3.7
The Custom tab of the Properties dialog box allows you to set up custom search parameters.



To create a custom property for a project, follow these steps:

1. Choose File, Properties.
2. Choose the Custom tab.
3. Type a property name in the Name list box. The drop-down list below the Name list box lists commonly used properties. If you want to use one of these, select it.
4. Use the Type drop-down list to define the type of data to place in the field. You should use this option only when you will type the value of the property instead of linking it to a field in the project file. When you link the property value to a project field, the Type

drop-down list is unavailable. The allowable data types are Text, Date, Number, and Yes or No (logical).

5. If you chose Text, Date, or Number previously, type a value in the Value text box. If you chose the Yes or No option in the Type list box, you see Yes and No buttons in the Value box. Select the one you want to use.
6. Click the Add button to add the property to the list in the Properties dialog box.

If you want to link a property value to a project field, follow these steps:

1. Choose File, Properties.
2. Choose the Custom tab.
3. Type a property name in the Name list box.
4. Select the Link to Content check box (refer to Figure 3.7). The Type list box is grayed out, and the Value text box becomes a drop-down list. The name of the text box changes to Source.
5. In the Source drop-down list box, choose the field that has the value you want the property to reflect.
6. Click the Add button to add the property to the list in the Properties dialog box.

If you want to delete a custom property, select it in the Properties list and click the Delete button.

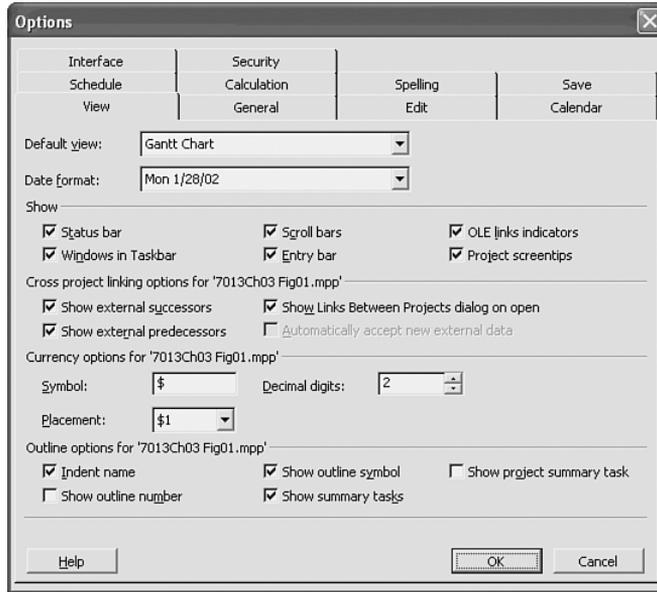
If you want to modify the value for a property, select the property name in the Properties list. This places the current name and value in the text boxes at the top of the dialog box. Change the Type or Value fields as needed, and the Add button automatically changes to Modify. If you change the Name field, you have to use the Add button to include it as a new property. You can then use the Delete button to remove the original, leaving the newly named version. Then you can click the Modify button to complete the change.

When you finish the custom properties list, click the OK button unless you want to make additional changes on one of the other tabs.

SELECTING THE ENVIRONMENT OPTIONS

Microsoft Project makes many assumptions regarding projects. You can review these default settings, which control the behavior of the application, in the Options dialog box. The options are divided into two types: global and file-specific options. To display the Options dialog box (see Figure 3.8), choose Tools, Options. The options in this dialog box are conveniently organized into categories on a number of tabs.

Figure 3.8
The View tab is the default tab in the Options dialog box.



Some of the options in the Options dialog box are specific to the file you are currently working with. These options include the filename in the section title. For example, the dialog box in Figure 3.8 shows three sections that contain file-specific options: Cross Project Linking Options for ‘New Product,’ Currency Options for ‘New Product,’ and Outline Options for ‘New Product.’ Changes made to these settings affect only the current project you are working on—in this case `New Product.mpp`. Any options that are not part of a section or for which the section title does not include the filename in the title (such as the Show section in Figure 3.8) are global options.

The Cross Project Linking Options For section of the View tab controls links between projects. For example, the setting in this section in Figure 3.8 is set for the active file only—the default is to display all external links. In addition, when you attempt to open a file that contains links to other projects, a dialog box alerts you that the file has external links.



Selecting the Show Outline Number option in the View tab of the Options dialog box displays the task list of the project in a traditional Work Breakdown Structure (WBS) outline format, tying the schedule of the project to a previously defined scope of work. This is useful to ensure that all the necessary work of the project has been captured.

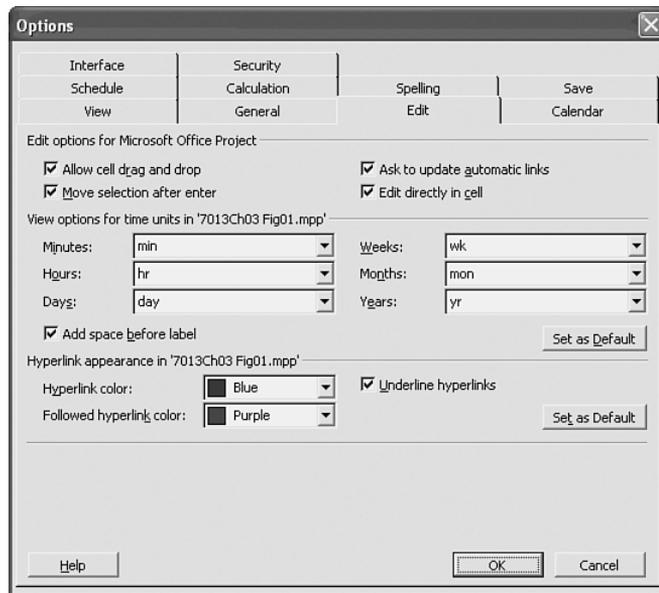
Also, when you select the option to display a project summary task, a roll-up summary task (numbered 0) appears at the top of the Gantt Chart view and spans the entire duration of the project you have created. Many times, Project users create this manually by indenting, or demoting, all subsequent tasks to the first one, simply because they are not aware of this feature.

NOTE

If the Office Assistant is active, the external link message appears in an Office Assistant pop-up.

In some cases, file-specific options can be changed for the current file and new files if the section containing the file-specific settings has a Set as Default button (see Figure 3.9). If you click the Set as Default button, Project updates the Global template to reflect the option settings. The Global template controls the settings for all new project files. The current document, as well as all new project documents, incorporates these options, but previously created documents do not change.

Figure 3.9
The Edit tab of the Options dialog box has two sections that include Set as Default buttons.



The following sections focus on a few choices in the Options dialog box that are critical in defining any new project and a few options of general interest.

NOTE

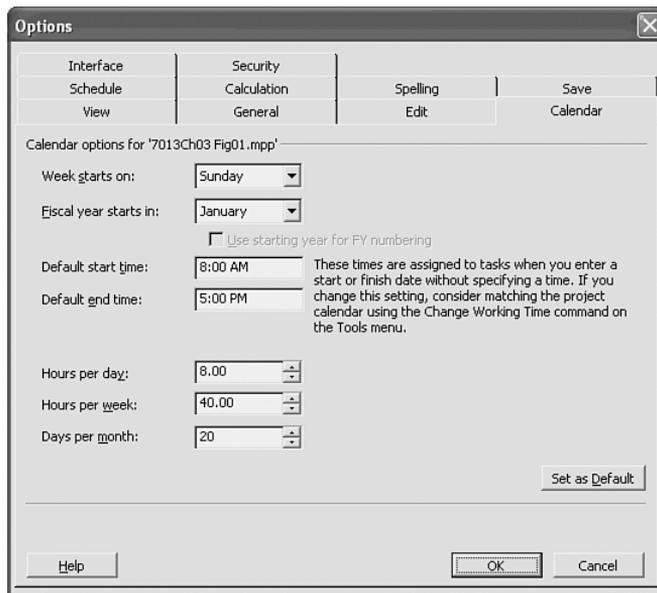
All changes you make in the Options dialog box are saved in the Windows Registry.

REVIEWING CRITICAL OPTIONS

There are several important settings on the Calendar tab that you should confirm are appropriate for your organization. These options determine how the calendar is used on printed reports, how your fiscal year is designated, and, most importantly, how your use of the terms *day*, *week*, and *month* are interpreted by Microsoft Project 2003. Figure 3.10 shows the settings on the Calendar tab.

3

Figure 3.10
The Calendar tab of the Options dialog box enables you to customize project plan settings to your organization's working hours.



DEFINING DAYS, WEEKS, AND MONTHS

The three most critical settings are those that define the meaning of the basic task duration units—days, weeks, and months. The fundamental unit of time in Microsoft Project 2003 is the minute. When you enter any other unit for a task duration, Project internally converts these terms into minutes, based on the definitions in the Options dialog box. All calculations dealing with duration are carried out in minutes. When you ask Microsoft Project 2003 to display a task duration in days, weeks, or months, Project uses these settings to convert the display. Therefore, the options Hours per Day, Hours per Week, and Days per Month are crucial to the interpretation and display of your estimates of task duration (refer to Figure 3.10).

Thus, for example, if you estimate a task duration to be 2 days, Project uses the entry in the Hours per Day text box to internally set the duration to minutes. If the Hours per Day entry is 8.00, the duration is recorded as 960 minutes (that is, 2 days×8 hours/day×60 minutes/hour). If the Hours per Day entry is 10.00 and you estimate the duration to be 2 days, then the task duration is recorded as 1,200 minutes, which is much more work than if the Hours per Day entry is 8.00.

You need to make sure these settings are appropriate for your organization. For example, if you work for an organization that has a 4-day work week (that is, each employee works 10 hours per day for 4 days each week), you should change the Hours per Day field to 10 and leave the Hours per Week field at 40. If your organization normally works 8 hours per day Monday through Friday and ½ day Saturday, you might prefer to change the Hours per Week to 44 so that when you estimate a task to take a week, the duration means the same thing to Microsoft Project 2003 as it does to you.

Note that the definition of the task duration is set at the time you estimate it, according to the definition of the terms you use (day, week, or month). If you later change the definition of a day, for example, to be 10 instead of 8 hours, Project does not change the minutes defined for each task duration. However, the display of those minutes in days or weeks is affected.



The Project Management Institute (PMI) suggests that no task be longer than 80 hours (or 2 weeks' duration, based on a 40-hours-per-week calendar). In other words, the work should be broken down to increments that are no longer than this span of time.

Also, defining months can be difficult because it is typically an inconsistent measure of time, so it's better to use hour or week duration units.

CAUTION

If you change the definitions for a day, week, or month after you enter the project data, Microsoft Project 2003 doesn't redefine the minute duration of tasks; it merely displays these minutes as a different number of days or weeks. For example, if you originally entered the duration of a task to be 1 week (at 40 hours per week) and later changed the number of hours in a week on the Calendar tab from 40 to 44 hours, the duration for the task would read .91w. The task would still be 40 hours, but 1 week would now be equal to 44 hours, not 40. This is one reason for establishing option settings before entering task and duration information.

→ To learn how Microsoft Project 2003 interprets duration, see "Creating a Task List," p. 115.

DEFINING THE DEFAULT START AND END TIME OF DAY

When you define the working days, hours, and months for the Standard calendar (see "Defining a Calendar of Working Time," later in this chapter), you define the hour when work normally begins and ends. It's important that you also record those standards in the Default Start Time and Default End Time text boxes on the Calendar tab of the Options dialog box. Microsoft Project 2003 uses these settings in several places:

- When you specify the date but not the time for the start or finish date of the project in the Project Information dialog box.
- When you put a constraint on a task, such as Finish No Later Than.
- When you begin tracking the actual work on the project.

For example, say that the normal work hours for an organization are 7:00 a.m. to 4:00 p.m. If you define these hours in your Standard calendar but leave the setting for Default Start Time at 8:00 a.m., Microsoft Project 2003 schedules the first task in the project to start 1 hour later than the actual start of work.

In addition, when you use the Tracking toolbar buttons to designate the percentage completed for a task, the time a task started is assumed to be the default start time from the Calendar tab in the Options dialog box. Even though time might not be displayed as part of the Start Date field format, it is stored with the date. So if the Standard calendar hours are from 7:00 a.m. to 4:00 p.m. and you mark a task as 100% complete, the actual start date shows the task starting at 8:00 a.m. and the actual finish date shows the task ending the next day at 8:00 a.m. If only the dates and not the time are displayed in the Start and Finish Date fields in the Gantt Chart view, it appears that there is an error—a task with a duration of 1 day (8 hours) starts on one day but ends on the next day. The culprit is typically an inconsistency between the time used on the Standard calendar and the time designated on the Calendar tab of the Options dialog box.

TIP

It's a good idea to display a date format that also displays time. The Date Format setting is on the View tab of the Options dialog box.

If you change the default start and end times, be careful to coordinate these time settings with the Standard calendar you create for your organization.



If you are having problems changing the default start times, see “Start Times Don’t Match” and “Making Start and End Time Changes Permanent” in the “Troubleshooting” section near the end of this chapter.

DEFINING THE START OF THE FISCAL YEAR

The name of the month that begins the fiscal year is a critical option. This choice affects displays and reports that show annual and quarterly amounts. If the fiscal year begins in October, for example, you might want all reports to include October through December figures in first-quarter totals and the annual figures to be calculated by using the October through September figures. The Fiscal Year setting is on the Calendar tab of the Options dialog box.

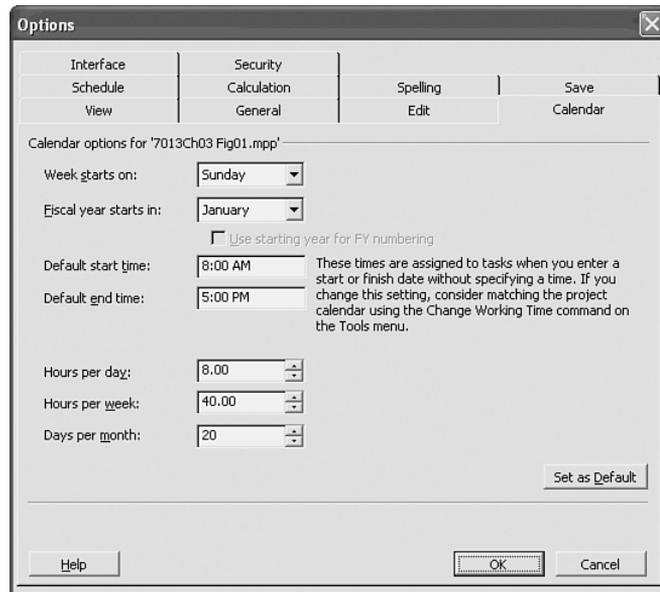
By default, the fiscal year is assumed to be numbered by the year in which the fiscal year ends. Therefore, the year in which the fiscal year ends will be used with all months in that fiscal year. For instance, if the fiscal year begins October 2003 and ends September 2004,

then the actual calendar month November 2003 would belong in the fiscal year that ends in 2004.

On the Calendar tab, you have the option to have the fiscal year numbering use the starting year instead of the ending year (see Figure 3.11). If you select the Use Starting Year for FY Numbering check box, a fiscal year running from October 2003 to September 2004 would have the calendar month of February 2004 belong in fiscal year 2003; the second quarter of fiscal year 2003 would be the calendar months January, February, and March 2004.

Figure 3.11

You can change the Fiscal Year Starts In option if you want to set some month other than January as the beginning of the fiscal year.

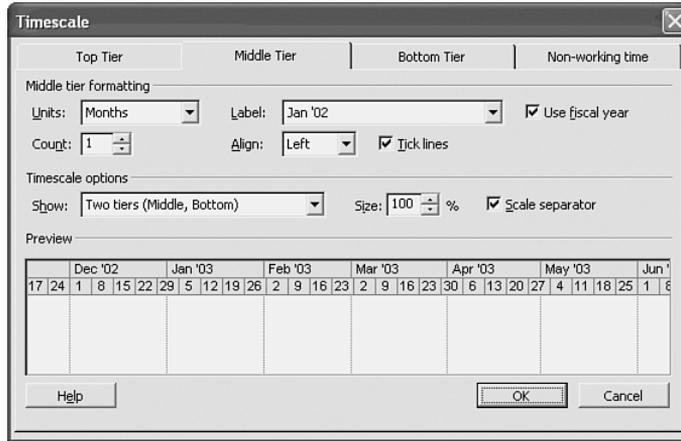


TIP

The Fiscal Year Starts In and Use Starting Year for FY Numbering settings are file-specific settings. If you want to change these settings for all future project files as well as the active file, click the Set as Default button near the bottom of the dialog box.

In some previous versions of Microsoft Project 2003, changing the Fiscal Year Starts In setting in the Options dialog changed the display of the calendar in the timescale of the Gantt Chart view; since Project 2000, this has not been the case. You can either retain the calendar year or show the fiscal year. To choose whether to retain the calendar year or show the fiscal year, you must access the Timescale dialog box by either choosing Format, Timescale or right-clicking the timescale headings in the Gantt Chart view and choosing Timescale from the shortcut menu. The Timescale dialog box appears. To display the fiscal year instead of the calendar year, click the Use Fiscal Year check box (see Figure 3.12).

Figure 3.12
The timescale headings can display fiscal years instead of calendar years.



You can display the fiscal year on either the major or minor scale of the timescale, which is the first or second calendar displayed. A useful display would be to have the fiscal year on one scale and the calendar year on the other scale, using the same unit for both scales.

NOTE

You can only change settings in the timescale of the current view. To update the timescale in another view, such as the Task Usage or Resource Usage view, you have to display that view and change the Timescale settings there.

The timescale display in the Gantt Chart view uses fiscal year numbers instead of calendar year numbers only when the timescale is formatted to display the year, not when displaying months or days.

SETTING OPTIONS IN THE CALENDAR TAB

To set critical calendar preferences, follow these steps:

1. Choose Tools, Options. The Options dialog box appears.
2. Click the Calendar tab.
3. If your fiscal year does not start in January, select the correct month from the Fiscal Year Starts In drop-down list. The default is for the next calendar year to be the fiscal year.
4. If your work day doesn't start at 8:00 a.m., enter the appropriate time in the Default Start Time text box. You can enter time in 12-hour or 24-hour format. If you use the 12-hour format, be sure to add p.m. to hours past noon (and remember that noon itself is 12:00 p.m.).
5. Change the Hours per Day, Hours per Week, or Days per Month fields, if necessary, to accurately represent your organization.

6. Click the Set as Default button to make the values you entered for Fiscal Year Starts In, Default Start Time, Default End Time, Hours per Day, Hours per Week, and Days per Month the default values for all new project documents.
7. When you are finished, click the OK button.

TIP

Some organizations change the hours to reflect the hours they expect to work on the project minus the hours needed for other activities (for example, to account for meetings that normally happen in the course of a 40-hour work week). You might change Hours per Day to 6h, allowing 2 hours per day for other activities. This type of change is a judgment call on your part. If you change the hours in this way, make sure the Hours per Week and Hours per Month fields are changed as well.



Companies typically split the day as 75% (for example, 6 hours/day, 30 hours/wk) productive time, or time worked on project-related tasks, and 25% (for example, 2 hours/day, 10 hours/wk) administrative time, or time for office-related tasks. Some companies expect a 45-hour work week in which 8 hours per day are billable and 1 hour is set aside for administrative matters.

When you're planning your project, it's best to consider the specifics of how your organization operates—or how your particular project will work.

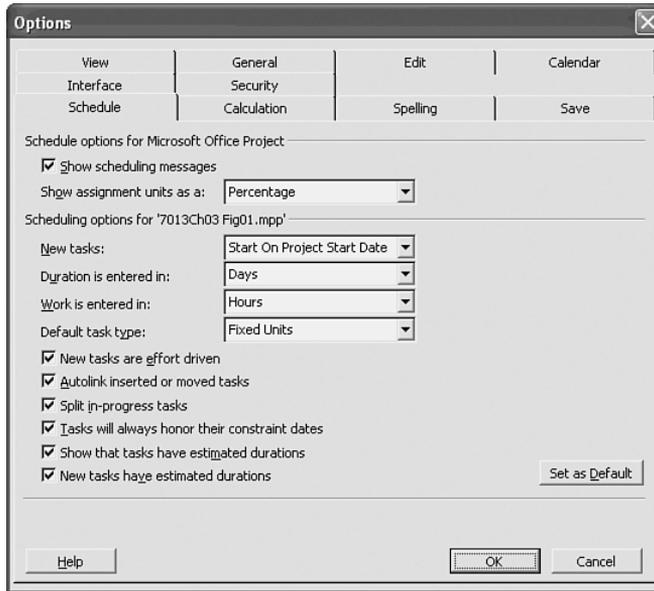
SETTING OTHER USEFUL OPTIONS

You can change other settings to make data entry easier. It is a good idea to review the current settings in the Options dialog box for each of the following items:

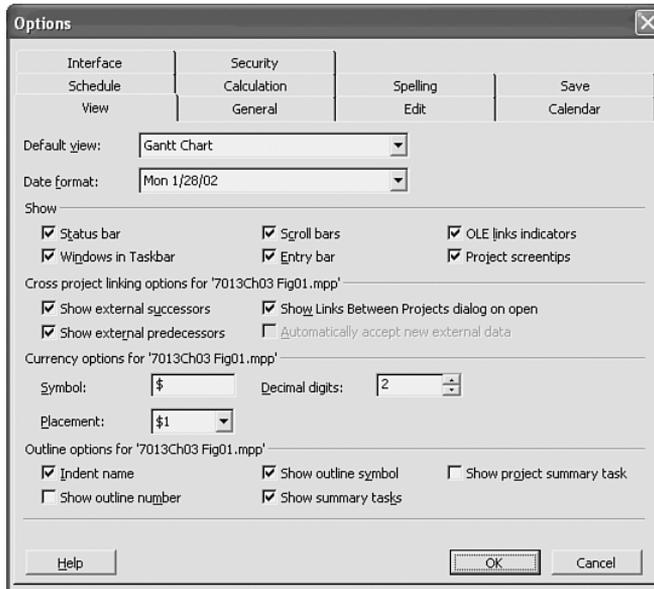
- Click the General tab to confirm that your name is in the User Name text box. Project uses this name for the Author and Last Saved By properties of the document.
- Click the Schedule tab to select the time unit you plan to use most often when estimating task duration (see Figure 3.13). Choose the Duration Is Entered In drop-down list to select Minutes, Hours, Days, Weeks, or Months. The Duration setting provides Microsoft Project 2003 with instructions about the unit of time to use if you enter a task duration without specifying the unit of time. For example, suppose most of your tasks will have the duration listed in days, and you have selected Days as the time unit in the Duration Is Entered In list box. In the Gantt Chart view, if you enter a 2 in the Duration column, Project records the task duration as 2d (that is, 2 days). Any other duration type has to be entered manually. For example, you would enter a task with a duration of 3 weeks as 3w.
- Click the View tab to change the default view for new projects. If you prefer to work in a view such as the Network Diagram view or the Task Sheet view—rather than the Gantt Chart view—when starting a new project, change the Default View setting (see Figure 3.14).

Figure 3.13

You can set the default time unit you want used for displaying task duration.

**Figure 3.14**

You can set the default view on the View tab.



NEW You can set the security settings for your project.

- Click the Security tab to determine whether you want to save any existing file properties with the saved file. You can choose to remove this information (for example if you are using an older file or a template) when you save the file. This tab also allows you to

choose the macro security settings for how Microsoft Project 2003 should deal with macros and add-ins.

- On the View tab, choose Date Format to specify how to display dates. The default format displays the date, with the day of the week. The Date Format list box provides alternative format options (such as the date and time together or just the date).

TIP

You can use the Control Panel to set the international regional style for entering date and time. To change the regional date and time formats, open the Windows Start menu and choose Settings, Control Panel. In the Control Panel folder, choose Regional Settings to display the Regional Settings dialog box. Choose the Date and Time tabs, and then make your selections.

- On the View tab, choose the Decimal Digits text box in the Currency Options Format section to specify the number of decimal points to use in displaying money amounts. The preset value is two decimal points, but you can change that to zero to suppress decimal-point display. As mentioned previously, you can use the Regional Settings dialog box in the Control Panel to select currency units and decimal display.
- In Microsoft Project 2003 views that contain tables (such as the Gantt Chart view), the Enter key causes the selection to advance automatically to the cell below—for example, when you type data in a sheet column, such as the left side of the Gantt Chart view or the Resource Sheet view. You can turn off this feature by deselecting the Move Selection After Enter check box on the Edit tab.

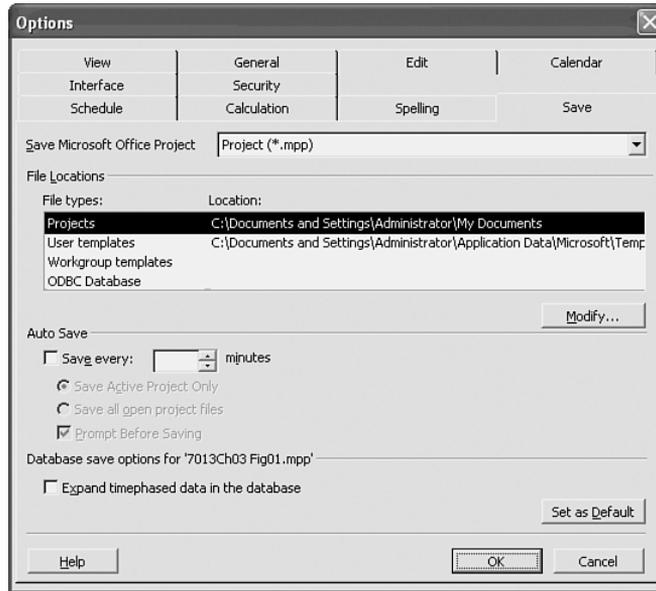
TIP

Many users enter tasks by typing the activity name, tabbing to the right to enter the duration, and then returning to the left to enter the next task name. Because Project won't automatically return to the next line and requires you to select the next task name field with the mouse or arrow keys, you might find it helpful to select the range of cells that you are entering tasks into. When you do so, the Tab key advances the selection to the right and then back to the left after the duration has been typed.

- Click the Save tab to change the default save format and path (see Figure 3.15). For example, if you want to save all your Project files as Microsoft Project 2003 templates or in a previous version of Microsoft Project 2003, click the Save Microsoft Office Project 2003 Files As drop-down and choose one of the listed options. You can also designate the default path where your Project files should be stored. The original default is C:\My Documents. From the File Locations list box, select the file type you want to change, and then click Modify to identify another path. However, if you are using Project Professional in a Project Server configuration, then your projects are saved to the Project Server database by default.

Figure 3.15

You use the Save tab to set save options, including the default save location, where to store templates, and autosave and database save features.



DEFINING A CALENDAR OF WORKING TIME

Microsoft Project uses a calendar, called the *base calendar*, to define the default working and nonworking days used for scheduling tasks in projects. Three base calendars are built in to Microsoft Project 2003:

- **Standard**—The 5-day, 40-hour week, with work from 8:00 a.m. to 5:00 p.m. that's standard in the United States.
- **24 Hour**—A round-the-clock operation from 12:00 a.m. to 12:00 a.m.
- **Night Shift**—An example of a calendar for those whose work shift starts toward the end of one day and ends in the morning of the next day.

All projects are assigned to a base calendar, and the default assignment is to the Standard base calendar. You can edit the Standard calendar, use one of the other built-in calendars, or create additional base calendars and assign a project to one of them if you want.

The Standard calendar assumes 5 working days per week, Monday through Friday, with 8 hours of work per day (including an hour off for lunch). The default schedule is 8:00 a.m. to 12:00 p.m. and 1:00 p.m. to 5:00 p.m. No designated holidays are set in the original Standard calendar.

You can edit the Standard calendar to reflect your organization's regular working and nonworking days and hours. You can also designate the exceptions to the normal workdays, such as holidays, or time periods when the organization will be closed for remodeling, a companywide meeting time when no work should be scheduled, and so on.

Base calendars are also used as the basis for resource calendars. Each resource has its own calendar, and the resource calendar is linked to a designated base calendar (by default the Standard calendar). The resource calendar inherits all the working days and hours of its base calendar, as well as all the holidays and other exceptions in its base calendar. The resource calendar can be edited to record the days and hours when the availability of the resource differs from the normal working times found in the base calendar. Examples of resource exceptions are vacation days, sick leave, and unusual hours on particular days.

→ To learn more about adjusting calendars to reflect the available resources, see “Understanding Resource Scheduling,” p. 321.

For example, the base calendar for an organization in the United States might show that Thanksgiving Day, the third Thursday in November, is a company holiday. Suppose a security guard is scheduled to work on Thanksgiving Day and to have the following Friday off. The resource calendar for this worker would initially show the company holiday, Thanksgiving Day, as a nonworking day and the next Friday as a working day. For this security guard only, the resource calendar needs to be edited to reverse the status of both days.

If a resource has only a few exceptions to the Standard calendar, it's easy to edit the resource calendar. If the resource has working times that are radically different from the standard working times, the editing job can require a lot of work. If there are several resources with the same unique set of working times, it's easier to create an additional base calendar that has those unique working times and link each unique resource to that custom base calendar. For example, night and weekend security guards have unique days and hours. Instead of greatly altering a number of individual resource calendars, it's easier to create a Security Guard base calendar to reflect the special working times for security guards. Then, you can link each security guard to that base calendar.



Many organizations allow people to have flex-time schedules. This gives you a business reason to create several variations of a base calendar. For example, you could configure base calendars for working hours of 6 a.m.–3 p.m., 7–4, 8–5, and so on. After you complete the calendars, you can assign them to the different resources that use those working hours. To keep this straight in your mind, think of the Standard calendar as the hours of operation for the business and think of the defined flex-time calendars as applying only to your resources, each with unique hours that they work.

On the other hand, some companies schedule all tasks based on the Standard calendar, suggesting that the task be scheduled to the day of the working calendar and not the hour of the working resource. In this case, the company is not interested in specifically which hour the task is worked—only that it is completed on the day that it is scheduled for completion.

It's important to keep your organization's work environment in mind when you are configuring base calendars for projects.

→ To adjust the resource calendars, see Chapter 9, “Understanding Resource Scheduling,” p. 321.

SCHEDULING WITH CALENDARS

Project uses the base calendar for an overall project and the resource calendars to schedule the start dates for tasks. When Project schedules a task, it notes the earliest possible starting date, based on when the predecessors to the task will be completed. If no resources are

assigned to work on a task, the project's base calendar is used to schedule the start and finish of the task. Otherwise, Microsoft Project 2003 checks to see what resources are assigned to work on the task and when the resource calendars for these resources show them being available for work. The task is then scheduled to start on the next available working hour for the assigned resources.

NOTE

The resource calendars take precedence over the project's base calendar. In the absence of a resource calendar, the task is scheduled using the project base calendar.

To select a base calendar, choose Project, Project Information. Click the Calendar drop-down list and choose one of the calendars—Standard, 24 Hour, and Night Shift—from the list.

EDITING THE STANDARD CALENDAR

Changing the working days and hours on the Standard calendar affects the scheduled work time for all tasks that have no resources assigned to them and for all tasks whose resources are linked to the Standard base calendar.

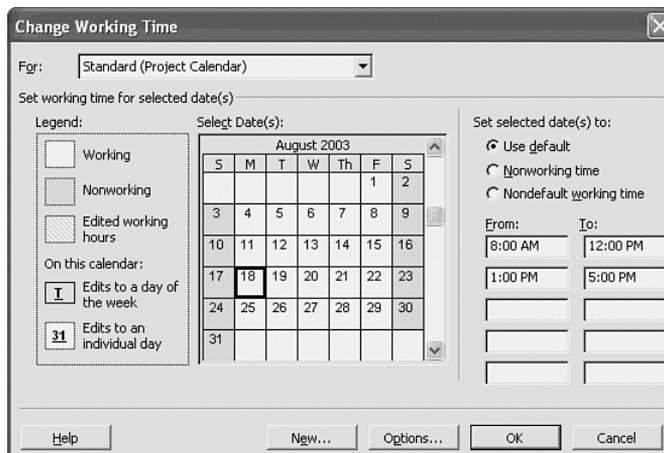
CHANGING WORKING AND NONWORKING DAYS

The original Standard calendar shows all weekdays, Monday through Friday, as working days and all Saturdays and Sundays as nonworking days. You can change the status of any day to make the day working or nonworking, and you can specify the number of hours available for work on any day by defining the starting and ending times for work shifts on that day.

To edit the Standard calendar, choose Tools, Change Working Time. The Change Working Time dialog box appears (see Figure 3.16). The Change Working Time dialog box can display a calendar of working and nonworking times for any of the base calendars and resource calendars defined for the project.

Figure 3.16

You can use the Change Working Time dialog box to define the days and hours when work can be scheduled by Microsoft Project 2003.



The dialog box contains a monthly calendar form, daily working times, buttons to change the calendar, and a legend. The legend indicates how working and nonworking days will be displayed, along with days that have different hours from the default hours. Each date that is modified from the default has the date underlined. If you modify a day of the week for the entire project—for example, you make the working time on every Monday from 1 p.m. to 5 p.m.—the letter M in the Working Time calendar is underlined and in bold. You can use the calendar scrollbar to change months and years. The calendar spans the period from January, 1984, to December, 2049.

To change the status of a single day or a consecutive period of days from working to nonworking or vice versa, you click the day with the mouse. You can select consecutive days by clicking and dragging. You can select multiple days that are not consecutive by pressing the Ctrl key as you click the extra dates. On the right side of the dialog box, there are several options in the Set Selected Date(s) To area; you can use these options to change the working or nonworking status of a day.

In the Set Selected Date(s) To area of the dialog box, you select the Nonworking Time option button to make the selected day(s) nonworking. To make the selected day(s) working days, you select the Nondefault Working Time option button.

TIP

To select days by using the keyboard, use the arrow keys to move to the first day you want selected. Hold down the Shift key and use the arrow keys to select additional consecutive days.

You can also change the working status of any day of the week for all weeks throughout the year. If your organization works on Saturdays, for example, you will want to make all Saturdays working days.

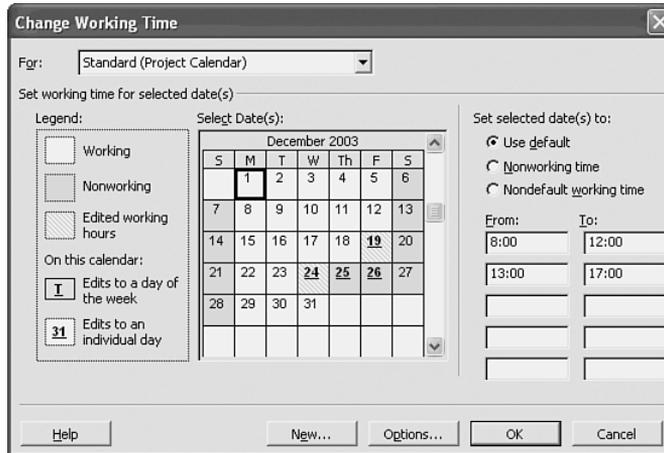
To change the working status of a day for all weeks, you select the day of the week by clicking the day letter at the top of the calendar (for example, S for Saturday). Then, you select the Nondefault Working Time or Nonworking Time option button in the Set Selected Date(s) To area of the dialog box.

After the working status of a day of the week is set, that becomes the default status for that day of the week. For example, suppose you have made every Friday, with the hours 8:00 a.m. to 12:00 p.m. (noon), a working day. If you changed a particular Friday to either a full working day or a nonworking day and then wanted to change it back to the default hours for Fridays, you would need to select the Use Default option button to reset the hours from 8 a.m. to 12 p.m. Selecting any specific date and the Use Default option button sets that date's working hours to the default for its day of the week.

Figure 3.17 shows the Change Working Time dialog box for the month of December 2003. The company is having a holiday party on Friday, December 19. No work is likely to be accomplished on this project in the afternoon, so this day has been marked as a partial working day. Because the company gives all its employees the afternoon of December 24

as well as all of December 25 and 26 to celebrate Christmas, these days are marked as nonworking days. Partial working days are marked with slash marks; full nonworking days are marked in gray.

Figure 3.17
You use the Change Working Time dialog box to define the days and hours when work can be scheduled by Microsoft Project 2003.



CHANGING THE STANDARD WORKING HOURS

You can define the work periods for each day by supplying up to five work periods in the From and To text boxes of the Change Working Time dialog box. The default 8-hour work time periods each day are 8:00 a.m. to 12:00 p.m. and 1:00 p.m. to 5:00 p.m.

Most of the time only the first four boxes (under From: and To:) are used. The remaining six boxes are typically filled in when the working times go across midnight, to account for several breaks or meal times, or for some other unusual work schedule. The section “Creating a New Calendar,” later in this chapter provides a good example of using the six time boxes.

To change the working hours in the Change Working Times dialog box, follow these steps:

1. Select the From text box for the first time period you want to change.

TIP

You can use Alt+F to select the first From text box, and then use the Tab key to advance to the other time boxes. You can use Shift+Tab to return to previous boxes.

2. Enter a time. For acceptable time formats, see the next section, “Entering Time Formats.”
3. Select the To text box and enter a time.
4. Repeat this process, by clicking (or using the Tab key) on each subsequent From and To text box, to change the time in that box.

5. To stay in the Change Working Time dialog box, simply click any day in the calendar. Otherwise, click OK.

NOTE

Project checks all time entries for consistency. Each successive time must be later in the day than the time in the preceding time text box.

You cannot leave a work period blank and put data in a work period beneath it. Therefore, you must use the top pair of From and To text boxes first; then you can fill in the next pair.

ENTERING TIME FORMATS

You can use several formats for entering times in the text boxes of the Change Working Time dialog box. You can use either the 12-hour clock or the 24-hour clock to enter times. If you enter times based on the 12-hour clock, make sure that you use the a.m. and p.m. suffixes to ensure that the program understands your intent. If you enter a time without using an a.m. or p.m. suffix, Project uses the first instance of the time following 8:00 a.m. (or whatever time you designate as the Default Start Time on the Calendar tab of the Options dialog box).

For example, if you enter **3:30** without a suffix, Project assumes that you want to use 3:30 in the afternoon and attaches the p.m. suffix. If you wanted to set a work shift to start at 5:00 in the morning, you would need to enter **5 am** instead of **5:00** because the program interprets 5:00 to mean 5:00 p.m. (If the time you want to enter is on the hour, you can simply enter the hour number.)

NOTE

You enter noon as **12:00 pm** and midnight as **12:00 am**.

CLEARING THE WORKING HOURS TEXT BOXES

To remove a work period from the working hours text boxes in the Change Working Time dialog box, you need to delete both the From time and the To time for that period. To do so, follow these steps:

1. Select the From text box for the work period you want to remove.
2. Press the Delete key to clear the text box.
3. Move to the To text box and select the time entry. Press Delete to remove that time period.

RESETTING A CALENDAR

You can select the Use Default option button in the Set Selected Date(s) To area of the Change Working Time dialog box to cancel changes you have made for calendar days. Selecting individual days and choosing Use Default returns those days to the original

working hours for those days of the week (as defined in the base calendar). Selecting the day of the week letters at the top of the calendar and choosing Use Default returns all days in the selected column to the standard 8-hour day, 8 a.m. to 5 p.m. (or whatever timeframes you have designated for the calendar). Selecting all the weekday letters at the top of the calendar and choosing Use Default returns the working hours—as well as any other exceptions—back to the default of the currently selected calendar. A warning message appears, indicating that the calendar will be reset to the original settings.

CREATING A NEW CALENDAR

Suppose you have a processing crew that works from 5:00 p.m. to 2:00 a.m., Monday through Friday. You can create a Processing Crew calendar to use as a base calendar for the resources in that group. On this calendar, the regular shift begins at 5:00 p.m. and continues to 2:00 a.m. the following day. An hour break is scheduled from 9:00 p.m. to 10:00 p.m.

Say that on Monday the crew starts at 5 p.m., breaks for dinner at 9 p.m., comes back to work at 10 p.m., and finishes the day at 12 a.m. (midnight). The work from midnight to 2 a.m. is entered on Tuesday. Tuesday through Friday the working times would show 12 a.m. to 2 a.m., then 5 p.m. to 9 p.m., and 10 p.m. to 12 a.m. Saturday would reflect the last hours (12 a.m. to 2 a.m.) of Friday night's shift. (Figure 3.21, later in this chapter, illustrates this example.)

You can create a new base calendar for this group by following these steps:

1. Click the New button at the bottom of the Change Working Time dialog box to create a new base calendar. The Create New Base Calendar dialog box appears (see Figure 3.18).

Figure 3.18

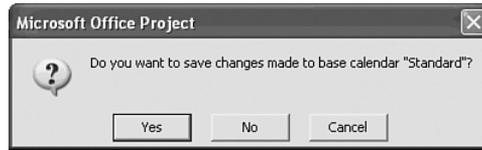
You can start a new calendar from scratch or you can use a copy of any existing base calendar.



2. In the Name text box, type a distinctive name, such as **Processing Crew**, for the new calendar.
3. Select the Create New Base Calendar option button if you want to start with no holidays and the standard 40-hour week. Or Choose the Make a Copy of...Calendar option button to start with a copy of an existing base calendar and all its holidays and exceptions. Then select an existing base calendar from the drop-down list. If you have already defined all regular company holidays on the Standard calendar, you should start with a copy of it so you don't have to enter those holidays again.
4. Click OK to start defining the new calendar. If you made changes in another calendar that you haven't saved, you see the warning shown in Figure 3.19 before you can proceed to make changes in the new calendar. Click the Yes button to save the changes you made in the other calendar. The new calendar name then appears in the For list box in the Change Working Time dialog box.

Figure 3.19

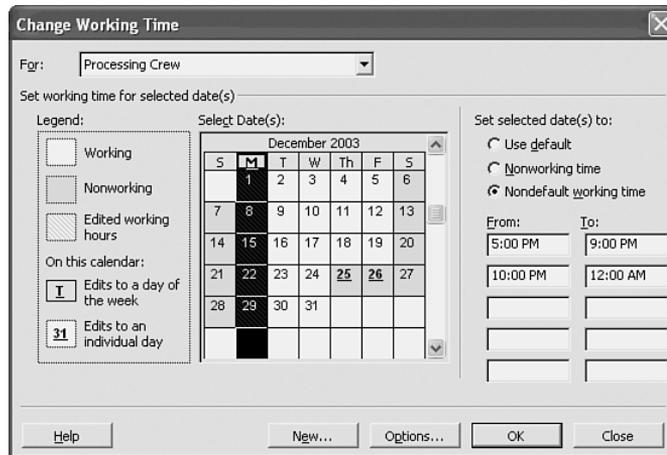
You must save or discard earlier, unsaved changes in another calendar before you can start working on a new calendar.



- To change the hours for a weekday such as Monday, select the letter at the top of the day column and enter the shift hours for that day in the From and To text boxes (see Figure 3.20). The hours for Mondays are 5:00 p.m. to 9:00 p.m. and 10:00 p.m. to 12:00 a.m. The remainder of the shift appears in the From and To boxes for Tuesdays.

Figure 3.20

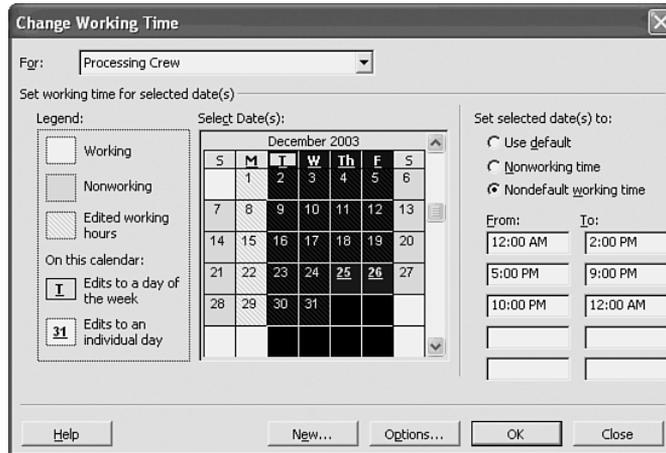
You can select the day letter at the top of a day column to change the hours for that day for every week.



- To change the hours for several days that have identical hours, drag from the letter for the first day to the last day in the group and enter the common hours in the text fields on the right side of the dialog box. The Tuesday through Friday schedules require three shifts, as shown in Figure 3.21. The first shift is the continuation of the previous evening's shift. The second and third shifts show the periods for the beginnings of the next evenings' shifts.
- To set hours for a day that is currently a nonworking day, you must first make the day a working day. Then you can enter the hours in the From and To text boxes. The Saturday hours in the Processing Crew calendar are just from midnight to 2:00 a.m. (see Figure 3.22). Select the S at the top of the Saturday column and choose the Nondefault Working Time option to make it a working day. Then you can enter the hours in the From and To text boxes.

Figure 3.21

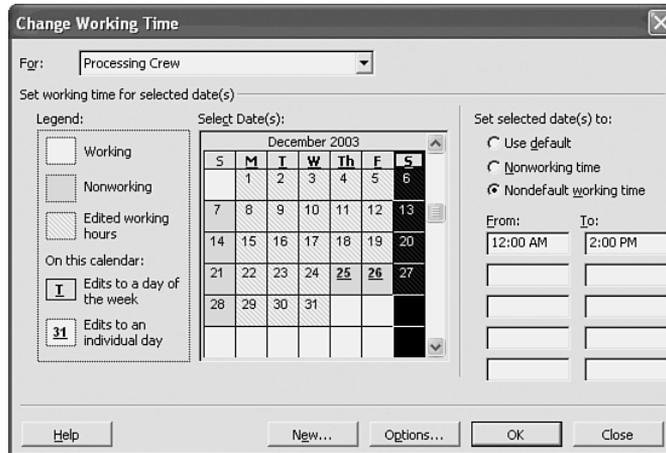
You can select several days by highlighting the letters for the days at the top of calendar display.



3

Figure 3.22

You must make a day a working day before you can define working times for it.



SAVING OR CANCELING CALENDAR CHANGES

To finish editing base calendars and save the changes you have made, click the OK button at the bottom of the Change Working Time dialog box. When you save the calendar, all the calendar information is saved along with the task and resource information in the project document. Clicking the Cancel button causes Project to ignore all the changes you have made.

WORKING WITH CALENDARS

If you create a base calendar in one project and want to use the same base calendar in future projects, you can use the Organizer to copy the calendar to the Global template (GLOBAL.MPT). The calendars in the GLOBAL.MPT file are automatically included in any new project file. You can also use the Organizer to copy a calendar to another existing project file, to delete a calendar from the active file, and to rename a calendar in the active file. The following section describes how to access the New Project Wizard and how to use it.

NOTE

The GLOBAL.MPT file is stored in the directory with the Microsoft Project 2003 program files, which is usually C:\Program Files\Microsoft Office\Office11\1033.

- In an environment where Project Server is being used, all the default calendars are held in the Enterprise Global and are automatically applied whenever a new project is created. We are really only considering Project Standard in this chapter, but for details of the Enterprise Project Management Solution (referred to as EPM), please refer to “Using Enterprise Global Settings,” p. 978.

USING THE NEW PROJECT WIZARD

A great feature of Microsoft Project 2003 is the New Project Wizard, which steps you through the process of creating a new project plan. It also enforces the correct use of Enterprise custom fields, encourages collaboration, and provides opportunities to attach supporting documentation to a project.

There are two ways to access the wizard:

- By selecting Define a Project from the Goal-Based User Interface
- By selecting File, New and then selecting New Blank Project from the wizard dialog box

NOTE

If the Goal Based User Interface is not on, the New from Wizard option does not appear in the sidepane.

The following steps describe the dialog boxes that take you through the wizard:

1. **General information**—You are asked to enter a start date for the project you are creating, unless the project is set to be scheduled backward from a finish date, in which case you are asked if you are sure that you want to schedule the project from a finish date, since the default is to schedule from the start. If there is required project information, a link to the Project Information dialog will appear, and in it you can populate the Enterprise Custom fields needed by your organization. No other information in this dialog box can be edited.
2. **Collaborate on your project**—This step is only displayed if you are using Project Professional and Project Server. This step offers the opportunity to connect to the Microsoft Project 2003 Server for collaboration with project resources. If you have already accessed the Microsoft Project 2003 Server, the Yes radio button is selected by default, and connection information to the Microsoft Project 2003 Server is populated; otherwise, the No radio button is selected. If you select Yes but have not used the server before, a link to the Set Connection dialog box will be displayed. If you select to change the server connection, the link Change Connection Information is displayed. If you select No, information on how to set up Microsoft Project 2003 Server later is displayed.

3. **Save your project**—Your project must be saved at this point before you proceed. If you are using Project Server, a dialog box appears, advising that your file will automatically register with the Project Server anytime you save information.
4. **Add documents that relate to your project**—This step in the wizard takes you to the SharePoint document library, where you can upload documents that are pertinent to your project plan, such as a project charter, a scope statement, feasibility analysis documents, budgeting documents, and change management requirements information.
5. **Enter additional information**—At this point in the wizard, you are directed to the link Save and Finish, which causes you to exit the wizard and allows you to continue to follow the steps within the sidepane to start entering tasks in the project.

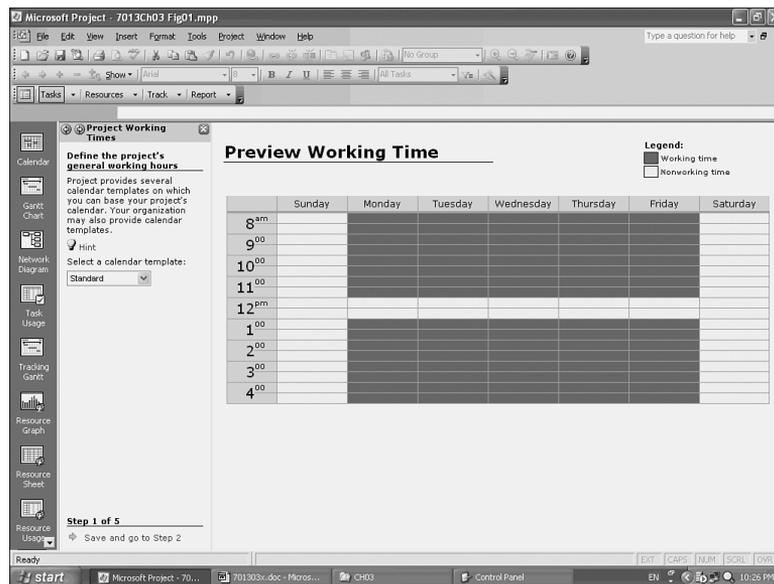
You can programmatically modify the New Project Wizard to enforce the best practices in attaching required documents, which might include many of the ones described in step 4.

USING THE NEW CALENDAR WIZARD

The New Calendar Wizard gives you a single, convenient place to set up calendars and options that affect a project (see Figure 3.23).

Figure 3.23

The New Calendar Wizard steps you through the process of defining the working times for a project.



You access this wizard via the Goal-Based User Interface by selecting Tasks and then selecting Define Project's General Working Hours. When you run the wizard, you work a series of steps. The following steps describe the dialog boxes that appear in sequence:

1. **Define the project's general working hours**—This step draws a graphical representation for the working time to the right, defined by the template that you've selected.

The drop-down list for templates includes all base calendars defined within the global file. If no template is selected, a standard working calendar of 8 a.m. to 5 p.m. Monday through Friday is displayed.

2. **Define the work week**—You need to define the working days of the project. You have the option to accept the current default working hours or to define new working hours. If you select the radio button to adjust the working hours, the sidepane displays a drop-down list from which you can select the day you want to change. There are two sets of fields for editing the working time, known as shifts. If you want to show and edit more shift times, click the link [Specify Additional Shifts](#). You can then select to apply the new working time to all working days or select a new day from the drop-down list. You can also select to make the new hours a default in all project files by selecting [Set as Default](#). Your changes are saved before you proceed.
3. **Define exceptions**—If you want to define exceptions to the calendar, such as company holidays (and have Project schedule over these nonworking times), click the link [Change Working Time](#), and the [Change Working Time](#) dialog appears. The sidepane provides detailed descriptions on how to make exceptions. Again, your changes are saved before you proceed to the next step.
4. **Define time units**—In this step, you define how many hours will equal a day, along with how many days will equal a week and a month. These units are synchronized with those that are defined on the [Calendar](#) tab of the [Options](#) dialog box, which you access via the [Tools](#) menu. Your settings are again saved before you proceed.
5. **Set the project calendar**—This step informs you that you have just set the calendar that affects all the resources utilized within the project. If you need to set up additional calendars for resource groups, you can click the [–](#) link. Otherwise, you can save and exit the wizard. If you select the [Define Working Times for Resources](#) link, you are taken through the following steps as well.
6. **Define additional calendars**—You are asked whether you would like to create a new calendar or edit an existing one. If you select [New](#), you need to name the new calendar you are creating. You can also choose [Edit](#) and then click [Next](#) to choose from a list of available base calendars.
7. **Define general working hours**—This process is very similar to the process in step 1, where you define the project's general working hours. However, in this case, you are setting the working hours for a new calendar or for one you have chosen to edit.
8. **Define the work week**—This is the same process as outlined in step 2, where you define the work week.
9. **Define exceptions for specific dates**—This step is the same process as outlined in step 3, where you define exceptions to the calendar.
10. **The additional calendar is set**—The calendar is now set. Click [Finish](#) to save and exit the wizard.

USING THE DEFINE WORKING TIMES FOR RESOURCES WIZARD

Project provides the Define Working Times for Resources Wizard for setting resource calendars. You access this wizard by clicking Resources from the Project Guide toolbar and then selecting Resource Calendars. You are then walked through how to set resource calendars by proceeding through a series of steps. The following steps describe the dialog boxes in the wizard:

1. **Specify working hours for individual resources**—A Resource Sheet view is displayed, with the Calendar field displayed so you can review what calendar your resources are already set up to use. You can then click the link Define Additional Calendars if you need to define a calendar for a group of resources who have working times that are different from the project base calendar. If you want to change working time for one resource at a time instead of for a group of resources, select one resource name at a time and continue through the steps of the wizard.
2. **Define general working hours**—Follow the same process as defined in step 1.
3. **Define the work week**—Follow the same process as defined in step 1.
4. **Define exceptions for specific dates**—Follow the same process as defined in step 1.
5. **The resource calendar is set**—You can choose to save and exit the wizard or to loop back through to work with additional resources that need calendar changes.

WORKING WITH THE ORGANIZER

You can use the Organizer to copy items (such as calendars) from one project or template to another. You can also use the Organizer to delete or rename a calendar. If you copy a calendar to the GLOBAL.MPT file, the calendar becomes part of all newly created project documents. For example, to customize the Standard calendar for all new projects, you follow these basic steps:

1. Choose Tools, Change Working Times to edit the Standard calendar in an active project document. Define special working times, holidays, and hours in the Standard calendar, as described in the section “Editing the Standard Calendar,” earlier in this chapter.
2. Use the Organizer to copy the customized Standard calendar to the GLOBAL.MPT file, replacing the existing Standard calendar in the GLOBAL.MPT file. The Standard calendar for all new projects will then have the customized features. See the section “Copying Calendars to the Global Template,” later in this chapter.

You can use the Organizer to manage not only calendars but also other customized items (such as views, reports, macros, forms, tables, filters, toolbars, and menu bars). Therefore, you can activate the Organizer from several points in Project. Probably the most convenient way to access the Organizer is by choosing Tools, Organizer.

NOTE

You can also access the Organizer through several other dialog boxes, such as those you access by choosing the following options:

- View, More Views, Organizer
- View, Table, More Tables, Organizer
- Project, Filter For, More Filters, Organizer
- Project, Group By, More Groups, Organizer

COPYING CALENDARS TO THE GLOBAL TEMPLATE

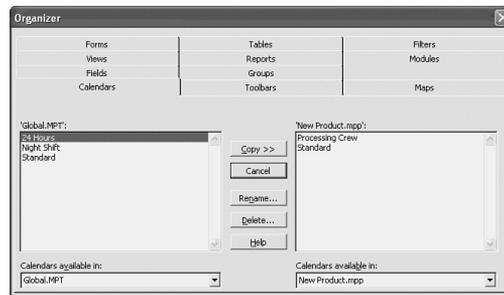
You can access the Organizer through the Tools menu. The active file—that is, the file that contains the calendar—is referred to as the *source file*. The file in which you would like to place a copy of the calendar is referred to as the *target file*.

Follow these steps to copy a calendar to the GLOBAL.MPT file:

1. Choose Tools, Organizer to display the Organizer.
2. Choose the Calendars tab (see Figure 3.24). The calendars in the active file are listed on the right side of this tab. The calendars in the GLOBAL.MPT file are listed on the left.

Figure 3.24

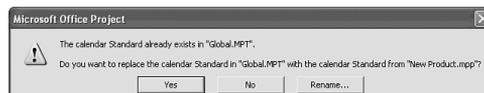
You can use the Organizer to make customized calendars available for use in other projects you are working on.



3. Choose the calendar you want to copy from the list of calendars in the source file on the right side of the dialog box.
4. Click the Copy button. If there is a calendar in the target file that has the same name as the source file you've selected (for example, the Standard calendar), Project asks for confirmation to override the former calendar (see Figure 3.25).

Figure 3.25

You must confirm that you want to replace the Standard calendar in the GLOBAL.MPT file with the Standard calendar from the source file.



5. Click the Yes button to replace the calendar in the target file with the new calendar from your active file. Or click the Rename button to copy the calendar to the target file by using a name that is not being used by another calendar.
6. Click the Close button to exit the Organizer.

NOTE

You cannot directly edit the calendars in the GLOBAL .MPT file. To edit a calendar in the GLOBAL .MPT file, copy it to a project file by using the Organizer. Edit the calendar in the project file, and then use the Organizer to copy it back to the GLOBAL .MPT file.

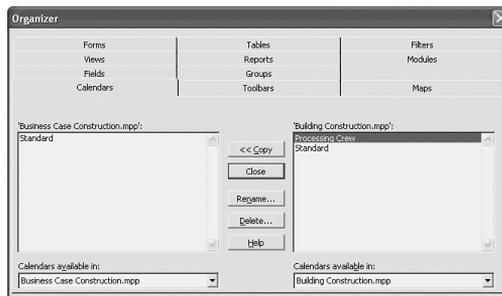
COPYING A CALENDAR FROM ONE PROJECT TO ANOTHER

You also use the Organizer to copy a calendar from one project document to another. For example, if you want to place a copy of the Processing Crew calendar from the Building Construction file in the Business Case Construction file, follow these steps:

1. Open both the source and target files.
2. Choose Tools, Organizer to display the Organizer dialog box.
3. Choose the Calendars tab. The calendars in the active file (for example, Building Construction in Figure 3.26), are listed on the right. The calendars in the GLOBAL .MPT file are listed on the left.

Figure 3.26

You can display the target and the source files in the Organizer dialog box.

**NOTE**

The source file does not always have to appear on the right. You can copy from right to left or left to right. When you select the item you want to use as the source, the Copy button's arrow changes direction accordingly.

4. Use the Calendars Available In drop-down list box on the bottom-left side to choose the target file. Figure 3.26 shows the Business Case Construction project as the target.
5. Choose the calendar you want to copy from the list of calendars in the source file.

6. Click the Copy button. If there is a calendar with the same name in the target file, such as the Standard calendar, Project asks you for confirmation to override the former calendar.
 7. Click the Yes button to replace the calendar in the target file with the new calendar from your active file. Or click the Rename button to copy the calendar to the target file by using a name that is not already being used by a calendar in the target file.
 8. Click the Close button to exit the Organizer.
- You can also use the Organizer to share items you customize with other project files (such as views, reports, and tables). For more information, see Chapter 21, “Customizing Views, Tables, Fields, Filters, and Groups,” p. 833.

PRINTING THE BASE CALENDARS

You can print a report to show the details of each of the base calendars in the active project file. Printing reports is covered in detail in Chapter 13 and Chapter 22, “Using and Customizing the Standard Reports.” This section is a quick reference on how to print the Working Days report, a report that provides information about the working and nonworking days in all your base calendars.

To print the Working Days report, follow these steps:

1. Choose View, Reports. The Reports dialog box appears, as shown in Figure 3.27.

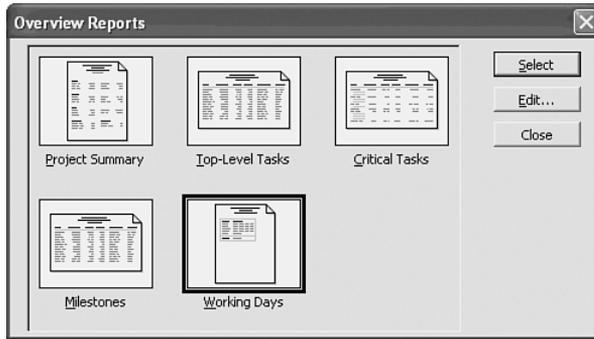
Figure 3.27
The Reports dialog box organizes reports into five standard categories plus a Custom option for customizing reports.



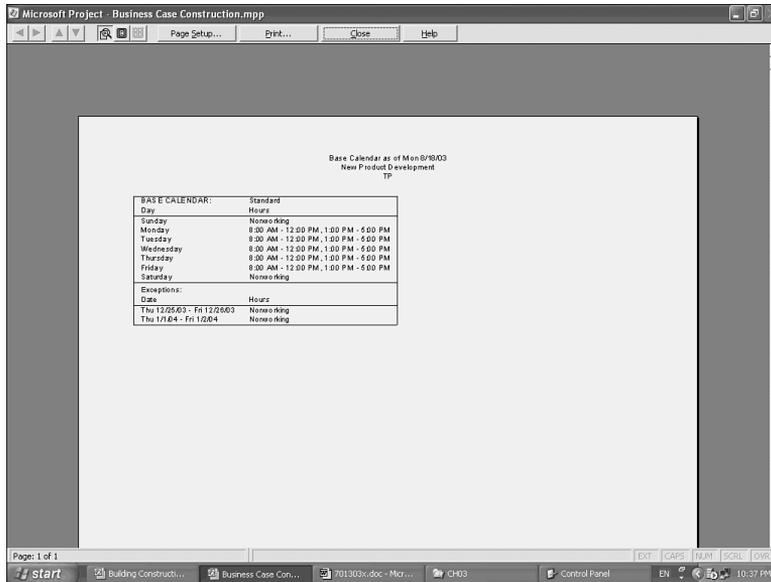
2. Choose the Overview category by double-clicking the Overview icon or by selecting the icon and then clicking the Select button. The Overview Reports dialog box appears (see Figure 3.28).
3. Click the Working Days report. Click the Select button to preview the report or simply double-click the Working Days report (see Figure 3.29).
4. Click the Print button to access the Print dialog box and send the report to your printer.
5. Click Close to return to the project workspace.

Figure 3.28

The Working Days report prints all calendars for the active project.

**Figure 3.29**

The Print Preview screen shows the layout of the Working Days report.



The report shows the standard working hours for each day of the week, followed by a list of the exceptions for individual days. Each base calendar prints on a separate page. Figure 3.30 is an illustration of the report for the Processing Crew base calendar. Holidays are listed as exceptions below the standard days and hours.

Figure 3.30
The Working Days report for the Processing Crew base calendar shows the standard working times plus the exceptions (such as holidays).

Base Calendar as of Mon 8/19/03
New Product Development
TP

BASE CALENDAR: Processing Crew	
Day	Hours
Sunday	None/Any
Monday	5:00 PM - 6:00 PM, 10:00 PM - 12:00 AM
Tuesday	12:00 AM - 2:00 PM, 5:00 PM - 6:00 PM, 10:00 PM - 12:00 AM
Wednesday	12:00 AM - 2:00 PM, 5:00 PM - 6:00 PM, 10:00 PM - 12:00 AM
Thursday	12:00 AM - 2:00 PM, 5:00 PM - 6:00 PM, 10:00 PM - 12:00 AM
Friday	12:00 AM - 2:00 PM, 5:00 PM - 6:00 PM, 10:00 PM - 12:00 AM
Saturday	12:00 AM - 2:00 PM
Exceptions:	
Date	Hours
Thu 12/25/03 - Fri 12/26/03	None/Any
Thu 1/1/04 - Fri 1/2/04	None/Any

Page: 2 of 2 Size: 2 rows by 1 column

TROUBLESHOOTING

START TIMES DON'T MATCH

I've changed my default start time to be 7:00 a.m. and coordinated this change with my Standard calendar, but my first task is still starting at 8:00 a.m. What's wrong?

If you choose Project, Project Information, you'll notice that the project starts at 8:00 a.m. This start time occurs because when you initially entered the project start date (in the Project Information dialog box) or accepted the default time, Project also assumed that this was the start time. The work time for the project was set to the hours of 8:00 a.m. to 5:00 p.m. You later made changes to the Calendar tab of the Options dialog box, but changes in this dialog box are not retroactive; you also have to change the start time for the project in the Project Information dialog box. This is one reason you should format all dates to display the time (through the Options dialog box). You can enter a date and time in the Start Date field of the Project Information dialog box, even though time is not set to display in that field. Choose Project, Project Information to recalculate the project start time.

MAKING START AND END TIME CHANGES PERMANENT

I've changed my default start and end times, but when I create a new project, the times revert to the default (8:00 a.m. to 5:00 p.m.). How can I make this change permanent?

There are two types of environmental options in the Options dialog box: file-specific options and global options. Start and end times are file-specific options. However, if you click the Set as Default button on the Calendar tab of the Options dialog box (where you set the start and end times), your custom start and end times become the default for any new



files you create. The setting is changed for the current project file as well as any new files you create. Any existing project files are not changed, however, and need to be adjusted as explained previously.