Chapter 2 – Creating New Project, Setting Calendars

Learning objectives

- Opening a project file
- Establishing the project information and
- Setting up project calendar
- Saving a project file

Opening a project file

The usual way

1. Choose Start ➪ All Programs ➪ Microsoft Office ➪ Microsoft Project 2013.
2. You see the main Project window, where you can begin building a task outline.

Other ways to start projects

You can base your project on one of the templates available for Project 2013. Templates contain "standard" information to help you get started quickly. Instead of entering tasks, you may need only to edit tasks.

- Click the File tab and, from the Backstage view, click New
- From the Available Templates click a template in the New from Existing group or you can search at the Office Online Web site for templates by clicking the arrow button beside the Search Microsoft Office Online for templates box.
- Select a template and click the Create button.

You can use this project as a starting point for your project and modify it as needed.

Note

You can open Existing projects by clicking the File button and, from the Backstage view, click Recent.

Project displays a list of the last 17 projects you opened. Click one and Project displays it on-screen.

You may not want to see so many recent files at a time. To change the number of files that Project displays in the Recent list.

1. Click the File tab and, from Backstage view, click Options.
2. In the Project Options dialog box that appears,
3. Click the Advanced tab.
4. In the Display section, change the number shown in the Show this Number of Recent Documents box.

Opening in earlier versions

If you want to open a file created in Project 2007 or earlier, you might need to set permissions.

1. Click the File tab and,
2. From Backstage view, click Options.
3. In the Project Options dialog box, click the Trust Centre tab and then
4. Click the Trust Center Settings button.
5. In the Trust Center dialog box that appears, click Legacy Formats and select one of these options:

- Prompt When Loading Files with Legacy or Non-default File Format or
- Allow Loading Files with Legacy or Non-default File Formats.
- Click OK twice to save your choice.

Entering Plan's title and other information

1. Click the **File** tab. The Backstage view appears. The Info tab should be selected by default. On the right side of the screen, under Product Information, note the key statistics, such as the start date on the right side of the Backstage view. Notice that many of the fields you see here are the same fields you see in the Project Information dialog box. You can edit these fields in either place. (See figures 2.1-2.2)

Fig. 2.1: Entering Project Information

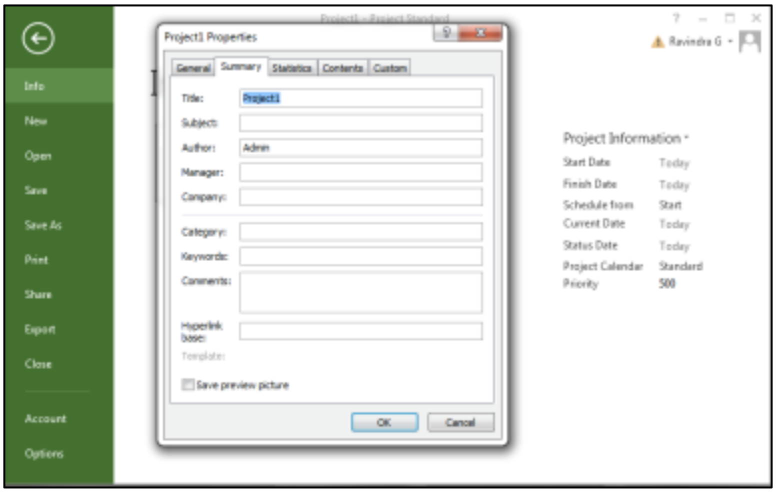

Fig. 2.2: Entering Project Information

2. Click **Project Information**. In the menu that appears, click **Advanced Properties**. The Properties dialog box appears with the Summary tab visible.
3. In the **Subject** box, type *New product launch*
4. In the **Manager** box, type *<Your Name>*
5. In the **Company** box, type *<Company Name>*
6. In the **Comments** box, type *New product launch*
7. Click **OK** to close the dialog box . To conclude this exercise, you will save the Simple Tasks file, and then close it.
8. On the **File** tab click **Save**

Establishing Basic Project Information

Use the Project Information dialog box to supply basic information about the new project

- click the Project tab and, in the Properties group,
- Click the Project Information button to display the dialog box. (Fig.2.3)

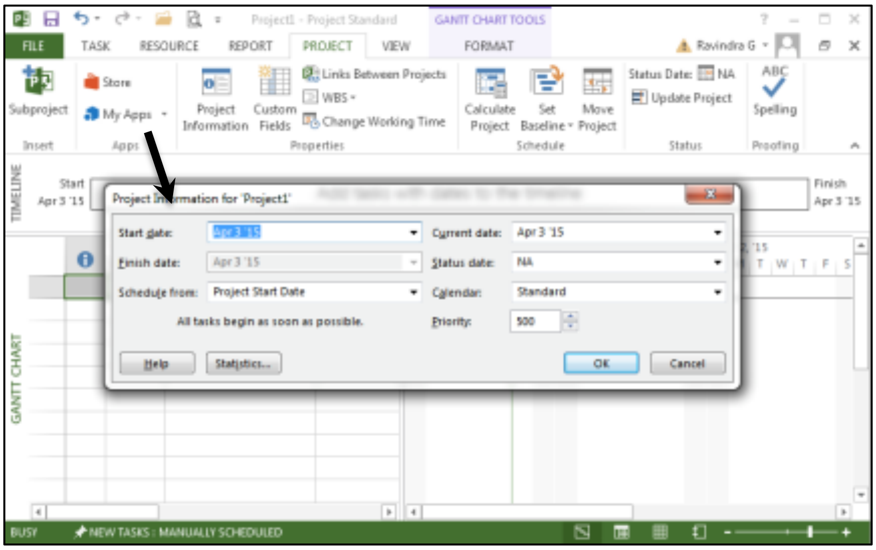

Fig.2.3: Project Information Dialogue Box

A. **Start Date**: If you set a start date for the project, all tasks begin on that date until you assign timing or dependencies to them.

B. **Finish Date**: If you know your project's deadline, you can enter it here and then work backward to schedule your project. You must change the setting in the Schedule from field to make this option available.

C. **Schedule From**: You can build schedules from completion to start by setting this field to Project Finish Date. Alternatively, you can build your schedule from the start date forward by accepting the default setting, Project Start Date.

D. **Current Date**: Project uses your computer's current date setting for the default entry in this field.

E. **Status Date**: Typically you set the Status Date after you set a baseline for your project and you begin tracking actual progress; that's because often the day you record the progress is not the day on which it occurred.

F. **Calendar**: You can select the calendar on which to base your schedule. The Standard calendar is the default

G. **Priority**: You can establish a priority for each project in addition to setting priorities for tasks. Project uses a numerical value between 1 and 1,000. The project level priority is required use shared resources across multiple projects.

Looking at Project Calendars

Setting calendar options

Project makes default assumptions about certain items that form the basis of the default project calendar. Project assumes that the default week contains five working days and 40 working hours.

To view the default calendar options,

1. click the File tab and, from Backstage view, (Fig.2.4)
2. Click Project Options.
3. Click Schedule in the Project Options dialog box
4. Read all the options.

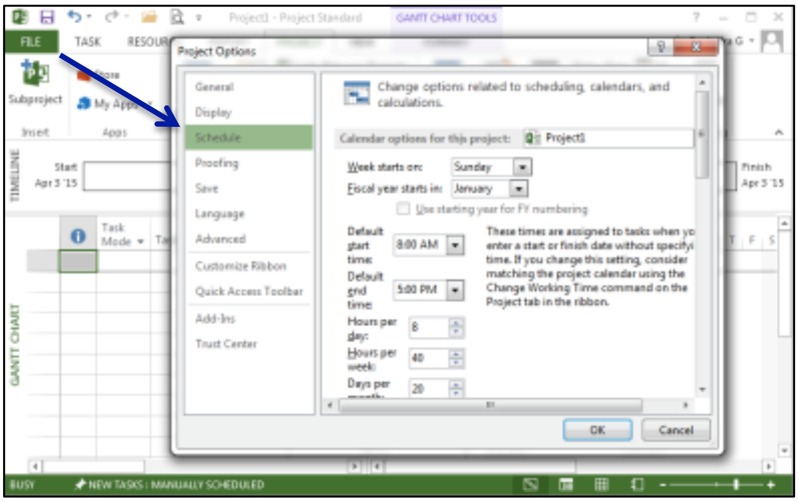

Fig.2.4: Scheduling Options Dialogue Box

Note:

Any changes you make to these options apply to the current schedule only. To save your current changes and make them apply to all new project schedules, open the Calendar Options for this Project list and select All New Projects.

Creating a new calendar

The Standard calendar might not work for your project under all circumstances

To create a new, project-wide calendar,

1. click the Project tab and,
2. in the Properties group, click Change Working Time to display the Change Working Time dialog box
3. The Legend panel on the left side of the dialog box identifies Working, Nonworking, and Edited Working Hours, as well as exception days and non-default workweeks. As you prepare more calendars for resources, tasks etc. they will also appear in the drop down.
4. Make a copy of the Standard calendar rather than modify it.
5. You can create a custom calendar by clicking the Create New Calendar button. (Fig.2.5)

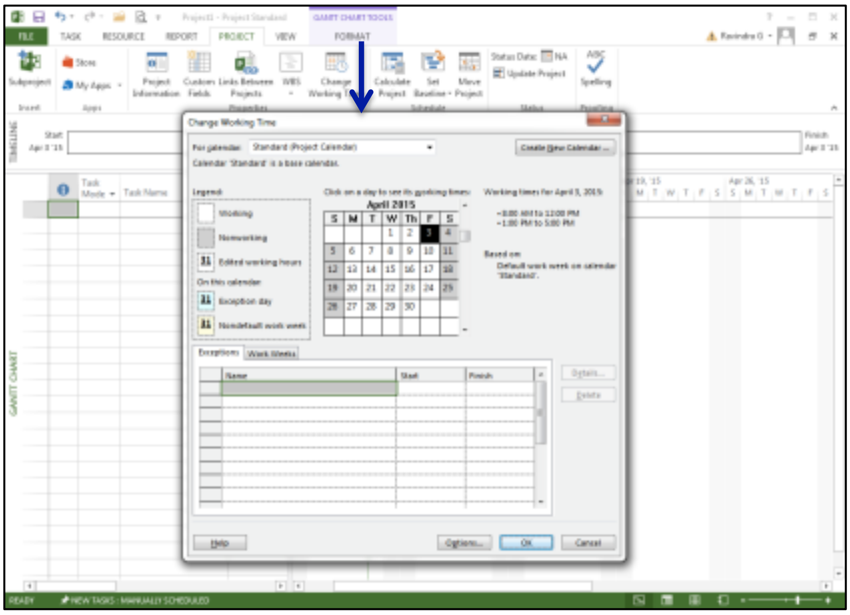

Fig.2.5: Creating a New Calendar

Adjusting the calendar

You can define the work week or create exceptions to the Standard calendar or any other calendar using the tabs at the bottom of the Change Working Time dialog box. To modify the work week follow these steps:

1. Click the Work Weeks tab.
2. Click the [Default] work week already defined for the calendar by Project
3. Click Details. Project displays the Details dialog box
4. Select the day you want to change from the Select Day(s) list on the left side of the dialog box.
5. On the right side of the box, select the appropriate option
6. In the grid section, define the working time for the selected day.
7. Click OK. Project redisplays the Change Working Time dialog box.

When you change the work week, the change you make is not considered an exception; instead, it's considered the new normal work week. You won't see any changes to the calendar showing up in the Change Working Time dialog box. You can, however, identify the working time for any day by clicking that day on the calendar; the working time appears to the right. (See figure 2.6)

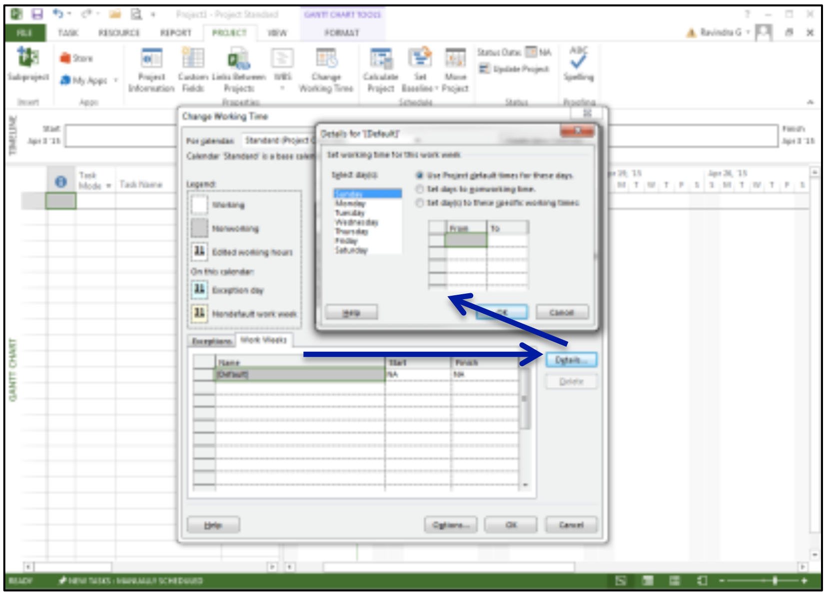

Fig.2.6: Setting Work Weeks

Setting exceptions

Suppose, however, that you have review meeting every Wednesday afternoon with the team and no work shall happen on the project during that period so you need to set an exception. To set up a working time exception like this one, follow these steps:

1. Click the Exceptions tab in the Change Working Time dialog box.
2. In the Name column, type a name that helps you remember the purpose of the exception.
3. In the Start column, select the date on which the exception starts.
4. In the Finish column, select the date on which the exception ends. Project sets every day between the starting and ending dates as an exception on the calendar, and the Details button and the Delete button become available
5. Click the Details button. Project displays the Details For dialog box
6. In the top section of the dialog box, click the Working Times option button and then set the working times
7. To repeat this working time pattern every Wednesday, click Weekly in the Recurrence pattern section and check the Wednesday check box.
8. In the Range of Recurrence section, set the starting and ending dates for the working time exception using the dates you supplied in Steps 3 and 4. You can change these dates if you want.
9. Click OK. When Project redisplays the Change Working Time dialog box, every Wednesday between the beginning and ending dates you specified appears as an exception on the calendar .(See Figure 2.7)

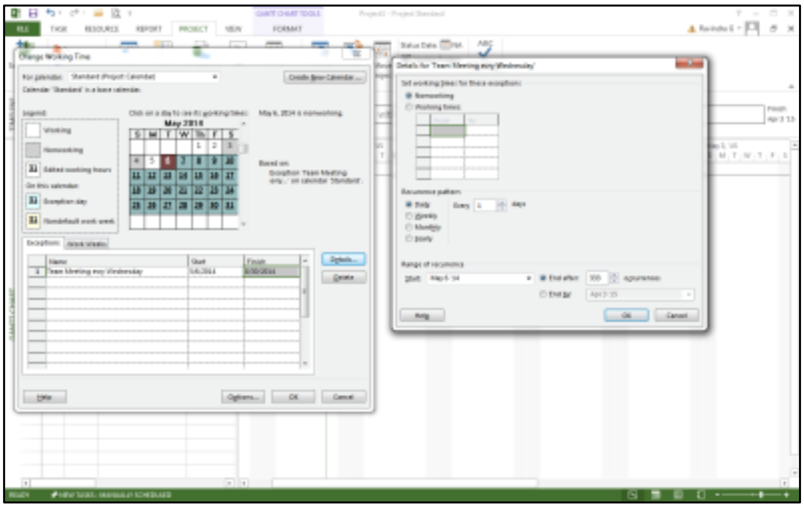

Fig.2.7: Setting Exceptions

Saving files

1. To save a Project file for the first time, click SAVE on the Quick Access Toolbar (QAT) or click the File tab and, in the Backstage view, click Save. In the Save As dialog box that appears, specify the name of the file, and save the file in your preferred location
2. In the File Name box, type a name for the file. Use the options in the left pane to navigate to the folder in which to save the file.

Saving files as templates

To save a project file as a template,

1. Use the Save As dialog box (Explained in the preceding section);
2. In the Save as type list, select Template (*.mpt).
3. As needed, check these boxes — and then click save.

To create a new schedule based on a template,

1. Click the File tab and, from the Back Stage view, click New.
2. Click My Templates to view a list of templates you've created, select one, and click OK.
3. Project opens a new file that contains all the information you saved in your template.
4. When you save your new project, be sure to supply a new name and select Project from the Save As Type list.