Managing Projects with MS Project 2010

Session: 3

Scheduling

◆ Define a project calendar

◆ Describe how to set calendar options and working times

◆ Describe how to choose the right calendar

◆ Describe how to work with Task calendars

◆ Explain the use of Resource calendars

◆ Describe how to create custom calendar templates

◆ Explain how to copy calendars to other projects

Introduction

◆ A project manager schedules and manages a project using calendars focusing on tasks of the day.

◆ Calendars help identify the resources working on tasks, whether there is any schedule or effort variance, and whether there are any pending tasks to be completed.

◆ Accordingly, project managers can schedule the tasks using resources for successful completion of a project.

◆ MS Project 2010 provides the following three types of calendars:

Base calendar

Resource calendar

Task calendar

- The base calendar, also known as the standard calendar, is the basic calendar that is used for all scheduling calculations in MS Project.

- All other calendars are built on this calendar.

- To configure calendar settings for a project, on the **Project** tab, in the **Properties** group, click **Change Working Time**.

- The **Change Working Time** dialog box facilitates a user to select either a calendar or a resource from the **For calendar** drop-down list.

- The **Create New Calendar** button provides an option either to create a new base calendar or copy from any existing calendars.

- Clicking the day to see its working times section displays a calendar.

- The **Legend** section on the left displays the color codes for working and nonworking times, exception day, and nondefault work week.

◆ The **Change Working Time** dialog box is shown in the following figure:

Base Calendar 3-6

◆ To add exceptions in the calendar, perform the following steps:

In the table on the **Exceptions** tab, in the **Change Working Time** dialog box, enter the name of the exception setting in the **Name** box.

Enter the **Start** and **Finish** dates for which the exception day and work hours need to be configured.

After entering the exception data, select the row and click **Details**. This opens the **Details** dialog box, where one can specify the nonworking and working hours.

Click **Nonworking** to specify the day as a full holiday. For example, for the anniversary day exception, the entire day would be nonworking.

Select appropriate recurrence pattern, for example, **Yearly**, in the current scenario.

Click **OK** to close the **Exception Details** dialog box

◆ Following figure shows the details set for the exception:

◆ To configure the work weeks, perform the following steps:

1 • On the **Work Weeks** tab in the **Change Working Time** dialog box, enter a name for this setting in the **Name** box.

2 • Enter **Start** and **Finish** dates.

3 • Click **Details** to select a day to configure its work hours, its **From** and **To** hours, and options to select either **Use Project default times for these days** or **Set days to nonworking time** or **Set day(s) to these specific times**.

4 • Click **OK** to close the details dialog box.

◆ The **Options** button in the **Change Working Time** dialog box opens the **Project Options** dialog box.

◆ Following figure depicts the details for Work Week in the **Change Working Time** dialog box:

Resource Calendar 1-2

- Users can specify work hours and workdays for a specific project resource.

- Resource calendars are calendars customized for specific scheduling requirements for individual resource groups.

- Users can modify this setting in the **Resource Information** dialog box for an individual resource or for a resource group.

- To modify settings in a resource calendar, perform the following steps:

Select the **Resource** tab present on the **Ribbon** and click the top part of the **Team Planner** option**.**

Select the resource or resource group for which workdays or work times need to be configured and click the **Details** option in the **Properties** section on the **Resource** tab.
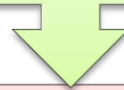
Click **Change Working Time i**n the **Resource Information** dialog box to display options for configuring work times and workdays for the selected resource.

◆ Following figure display options for configuring work times and workdays for the selected resource in the **Change Working Time** dialog box:

◆ Similar to resource calendar, a task calendar can be used to create calendars with specific scheduling requirements for a particular task.

◆ Steps to create a new calendar for the task schedule are as follows:

1
• On the **Project** tab, click the **Change Working Time** dialog box to display the **Change Working Time** dialog box.

2
• Click the **Create New Calendar** button to create a new calendar, **Weekly Client Meetings**. The new calendar can be a copy of an existing calendar or a new base calendar.

3
• Click **OK** to create the new calendar and return to the **Change Working Time** dialog box.

4
• Then, click the **Work Weeks** tab on this dialog box and select the row in the table with the default schedule for the calendar.

5
• Click the **Details** button to specify the work days and time for tasks in this calendar.

6
• From the **Select day(s):** list box, select **Thursday** as the day on which the weekly meetings will be scheduled. Select the **Set day(s) to these specific working times**: option and specify the meeting hours as 19:00 P.M. to 21:00 P.M.

Task Calendar 2-4

◆ Following figure shows the calendar settings:
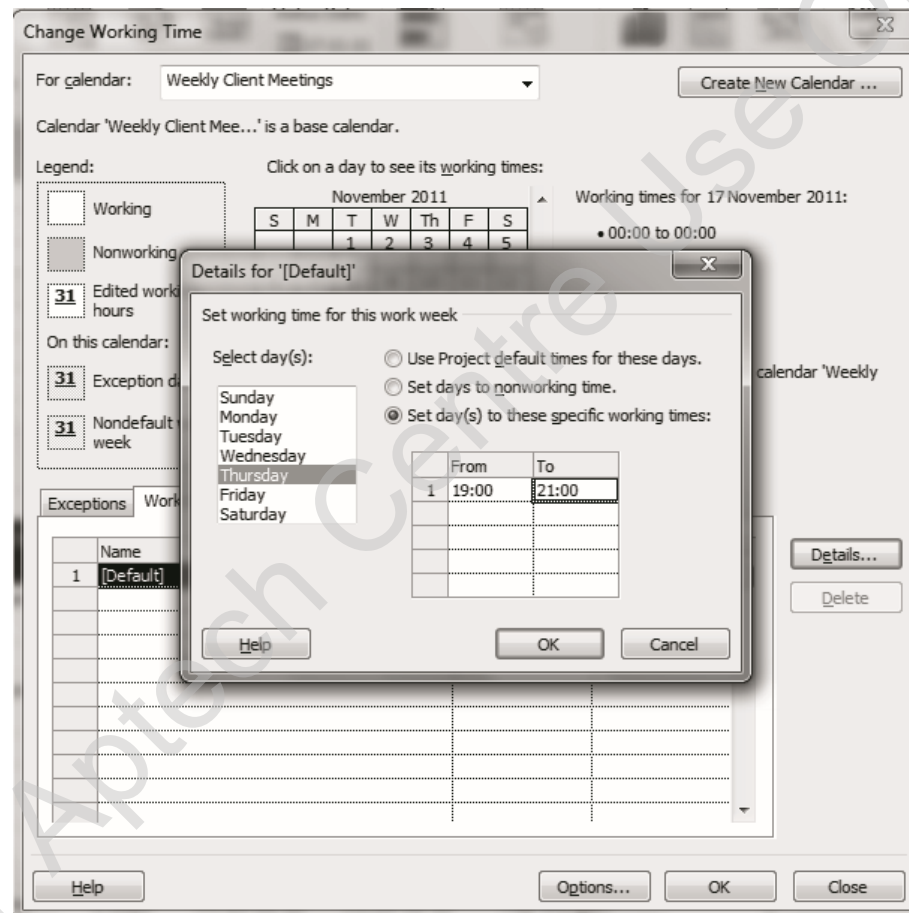
7 • Click **OK** in all the open dialog boxes to save the calendar settings.

◆ The new task calendar needs to be assigned to the task. This can be done using the following steps:

From the **Gantt Chart** table, select the task from the **Task Name** column.

In the **Properties** group on the **Task** tab, click the **Information** option to display the **Task Information** dialog box for the selected task.

In this dialog box, select the **Advanced tab** and from the **Calendar** drop-down list, select the new calendar, **Weekly Client Meetings**.

Click **OK** to assign the calendar to the selected task.

◆ The **Task Information** dialog box is shown in the following figure:

- A project manager, when scheduling tasks, should set the working times depending on the complexity of the project, timelines, resources, and budget.

- MS Project provides calendars and work hours for scheduling tasks by setting calendar options and customizing work hours.

- When creating tasks and assigning resources, MS Project 2010 schedule tasks based on the standard calendar.

- By default, according to MS Project, one workday has eight work hours.

- A project manager should also check working time and make sure that any specific nonworking days are updated for the project.

Adjusting Project Calendar Options 1-2

- To modify the calendar options, click the **File** tab and select **Options** from the **Backstage** view.
- This displays the **Project Options** dialog box. Here, from the options in the left pane, select **Schedule**.
- The same settings are displayed by clicking the **Options** in the **Change Working Time** dialog box.
- Following figure depicts an example of adjusting calendar options:

◆ A manager can configure or adjust the project calendar options using the following steps:

1 • Start by specifying whether the settings will apply to the current project or to all projects.

2 • Specify settings to indicate the beginning and ending day of a workweek, the start and end time of a workday, the number of work hours per day and per week, and the number of working days per month.

3 • Click **OK** to save the calendar settings.

- Managers can specify custom scheduling options depending on the project needs.

- After configuring the project calendar to the project requirements, the next step is to specify scheduling options.

- Scheduling options can be specified as follows:

Click the **Project Information** option from the **Project** tab and set the project calendar.

Enter the **Start date** if the project is scheduled from a specific date to start or enter the **End date** if the project has to be completed on a specific end date.

Select the **Current date**, which by default, displays computer clock settings that can be modified by the user.

Optionally, specify a **Status date**. The **Status date** helps the project manager to track the progress of the project on that specific status date.

Specify a value for **Priority** box. Priority is useful if multiple projects that are linked among each other exist in an organization.

◆ Following figure shows an example of configuring project schedules in the **Project Information** dialog box:

◆ MS Project 2010 includes a user-controlled scheduling feature that helps schedule projects in less time and to control all the phases of project life cycle.

◆ User-controlled scheduling is done in two modes:

    ◈ Manually Scheduled

    ◈ Auto Scheduled

- The MS Project based calendars do not have any holidays marked up.

- For accurate scheduling tasks including details such as organization specific holidays, it is suggested to create custom calendars for projects.

- To create a custom calendar, perform the following steps:

1	• On the **Project** tab on the Ribbon, click **Change Working Time** to display the **Change Working Time** dialog box.
2	• In this dialog box, click the **Create New Calendar b**utton in the top-right corner. This displays the **Create New Base Calendar** dialog box.
3	• Here, enter **SSU_Standard_Calendar** as name of the custom calendar in the **Name** box.
4	• Click **OK** to create the custom calendar.
5	• Finally, click **OK** in the **Change Working Time** dialog box to save the configuration to the custom calendar.

◆ Following figure illustrates creating a custom calendar based on the 24 Hours calendar:
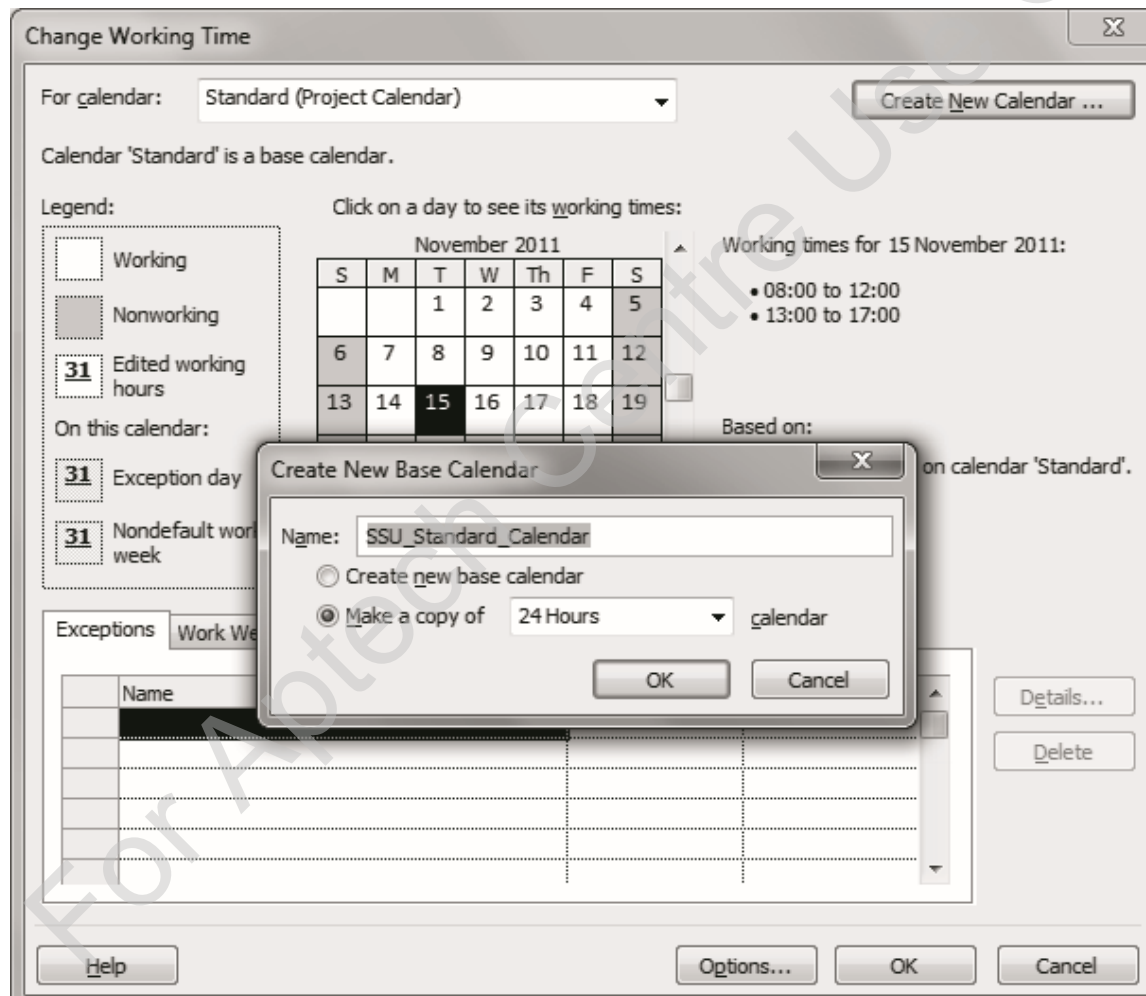
◆ Calendars can be shared across all projects using the **Organizer** feature in MS Project 2010.

◆ Organizer is the control center for custom calendars in project files.

◆ Managers can copy custom calendars into a global template file, **Global.MPT**.

◆ The settings and customizations available in this template will be available across all projects.

◆ This method is especially useful when all the project managers in a company use a consistent calendar across all projects.

Sharing Calendars 2-3

◆ To make a calendar available across all projects:

1
- Open the project that contains the custom calendar.

2
- On the **File** tab, select the **Info** option.

3
- Next, click the **Organizer** button in the **Backstage** view. This displays the **Organizer** dialog box.

4
- In this dialog box, click the **Calendars** tab. The list box on the left displays calendars available in the global template, Global.MPT, which are available across all projects.

5
- From the list box on the left, select the custom calendar that is required across all projects and click **Copy** to copy between the two list boxes.
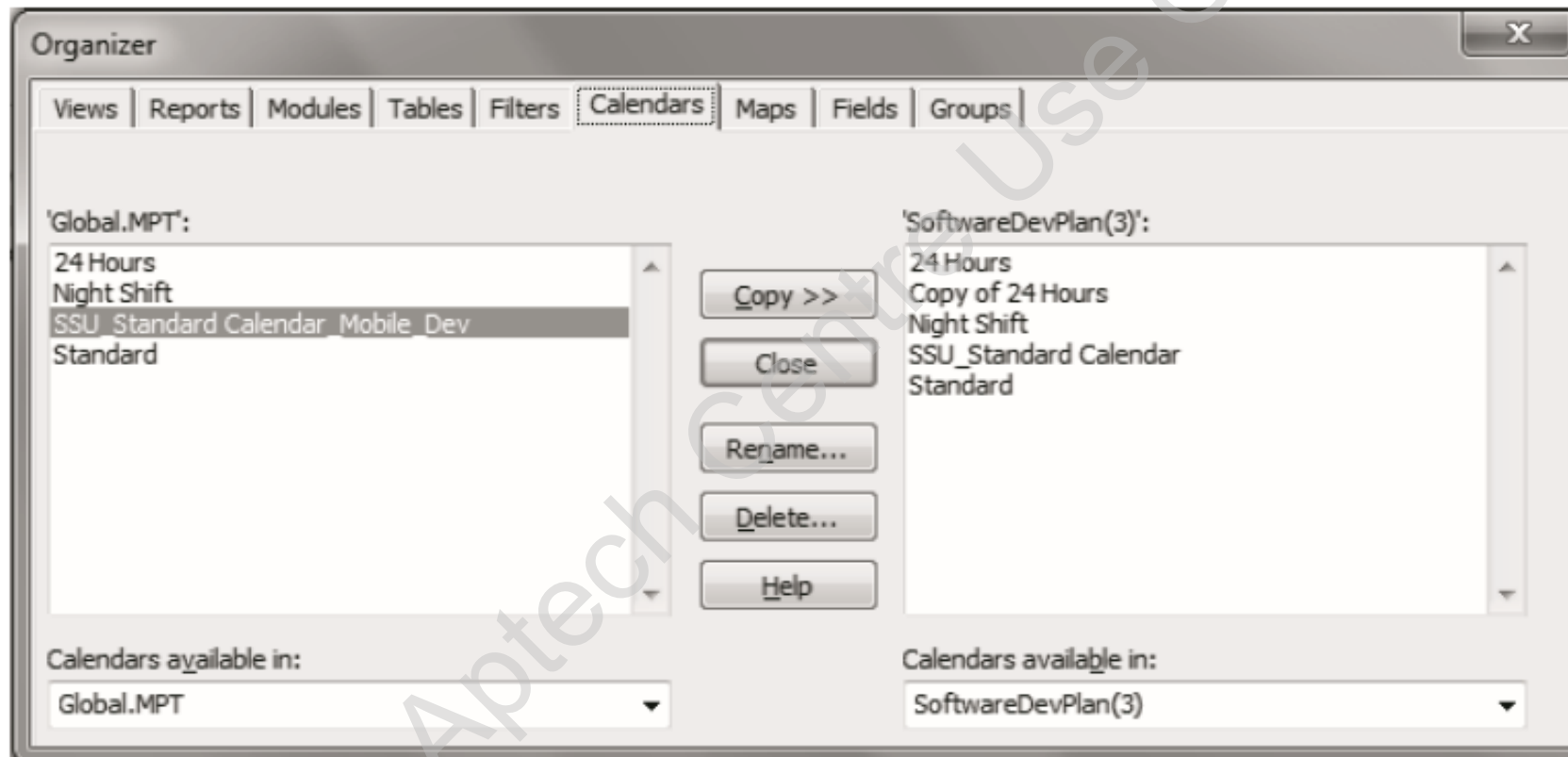
6
- Finally, close the **Organizer** dialog box to apply the changes.

◆ Following figure illustrates an example of sharing calendars across all projects:

Summary

- Calendars help schedule tasks and resources efficiently and track their progress.
- MS Project 2010 provides three types of calendars, namely, base calendar, resource calendar, and task calendar.
- The base calendar or the standard calendar is the basic calendar template with a five-day week from Monday to Friday and eight working hours from 8 A.M. to 5 P.M.
- Two additional templates available for scheduling based on the organization or project work times are 24 Hours and Night Shift.
- Project managers can select any of the calendar templates and configure the work weeks and hours according to the project and organization requirements.
- Project managers can configure scheduling requirements for a specific project resource or task in the resource calendar and task calendar respectively.
- Project managers can create as well as share custom calendars across multiple projects.