

TOPIC B

Set Project Plan Options

After creating a new project plan, it is important to capture the information about your project and save it so that you and others can easily understand what the project is about. In this topic, you will set options specific to your project, and then you will save your new file.

The Project Information Dialog Box

When you create a Project file, you are not prompted to supply any project information. A good place to get started is the *Project Information dialog box*. The **Project Information** dialog box captures high-level information about your project as a whole. By default, the **Project Information** dialog box uses the current date as the project start date. Project calculates the finish date after all of your task information is established and linked.

The screenshot shows the 'Project Information for 'My HR Manual'' dialog box. It contains the following fields and options:

- Start date:** Mon 8/3/20
- Current date:** 7/1/20
- Finish date:** Mon 8/3/20
- Status date:** NA
- Schedule from:** Project Start Date
- Calendar:** Standard
- All tasks begin as soon as possible.** (checkbox)
- Priority:** 500
- Enterprise Custom Fields:**
 - Department:** (empty dropdown)
 - Table:** A table with two columns: 'Custom Field Name' and 'Value'. The table is currently empty.

Buttons at the bottom include 'Help', 'Statistics...', 'OK', and 'Cancel'.

Figure 2–3: The Project Information dialog box is the place to view and modify high-level information about your project.

The Project Properties Dialog Box

In the *Project Properties dialog box*, you can enter general project information, such as the project name, the project manager's name, the name of your organization, and specific keywords related to the project. This information will help you organize and locate your Project files.

The screenshot shows the 'My HR Manual.mpp Properties' dialog box with the following fields and values:

- Title: My HR Manual.mpp
- Subject: Human Resources Manual
- Author: My Name
- Manager: My Manager
- Company: Greene City National Bank
- Category: (empty)
- Keywords: training HR human resources
- Comments: (empty)
- Hyperlink base: (empty)
- Template: (empty)
- Save preview picture:

Figure 2-4: The Project Properties dialog box.

	<p>Note: Filling in the project name and keywords in the Project Properties dialog box will help search indexing on your local machine and in other shared file scenarios such as when using SharePoint. It will help you and others in your organization find the project plan using the Search command in Windows or SharePoint.</p>
--	---

Methods for Scheduling Projects

The project's beginning date is shown in the **Start date** field of the **Project Information** dialog box. The project's ending date is shown in the **Finish date** field. You can change the **Start date** or **Finish date** by selecting the down arrow on the right side of each field.

Projects can be scheduled either from a start date or a finish date, but not both at the same time. The **Schedule from** drop-down list in the **Project Information** dialog box shows whether your project is scheduled from the start date or the finish date. If the **Schedule from** drop-down list is set to **Project Start Date**, the **Start date** drop-down list will be active and the **Finish date** drop-down list will be inactive. On the other hand, if the **Schedule from** drop-down list is set to **Project Finish Date**, the **Finish date** drop-down list will be active and the **Start date** drop-down list will be inactive.

By default, Microsoft Project schedules all new projects from a start date. In this mode, all tasks are automatically scheduled to begin as soon as possible, giving the maximum amount of schedule flexibility.

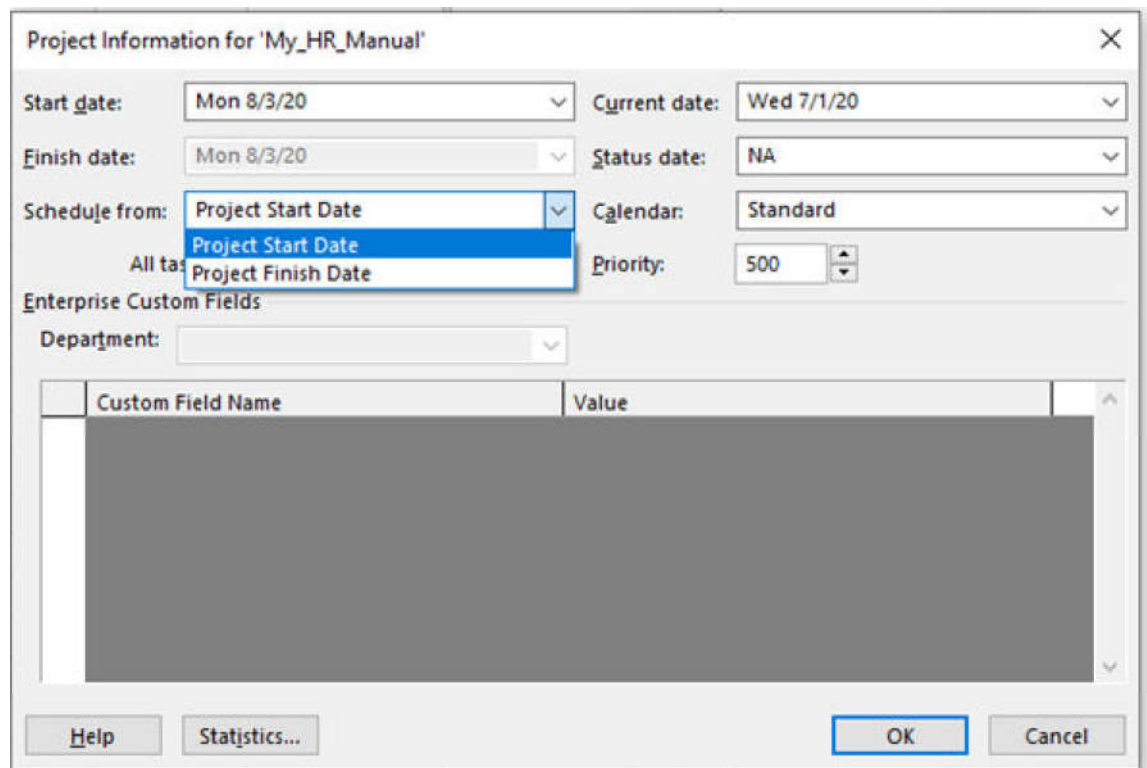




Figure 2-5: Scheduling a project from a start date or finish date.

Scheduling a Project from the Finish Date

If you choose to schedule a project from a finish date, all new tasks will be automatically scheduled to begin as late as possible. This constraint, as well as others that may be applied in this mode, limits schedule flexibility. It is advantageous to schedule a project from a finish date when:

- Your project has a firm deadline and you want to identify a date when the project must start in order to finish on time.
- You are not sure when your project will begin.
- Your organization requires that this mode be used.
- It is better for the project to start as late as possible.

 **Note:** If the **Schedule from** drop-down list is set to **Project Finish Date** during the planning phase of your project, consider changing **Schedule from** to **Project Start Date** during implementation. This will increase your flexibility to make schedule changes if necessary.

 Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Set Project Plan Options.

ACTIVITY 2–3

Setting Project Plan Options

Before You Begin

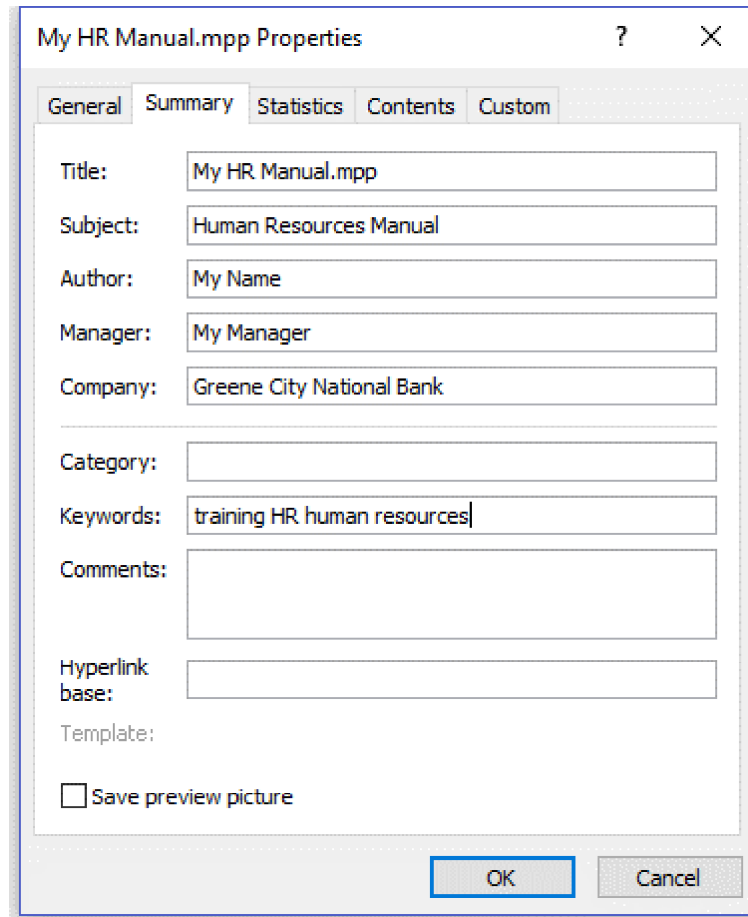
The **My HR Manual.mpp** file is open.

Scenario

Now that you have created the project plan file you will use to manage your project, you need to enter a few important items in the file. You want the project to begin on August 3, 2020; to schedule the project from the start date; and to populate the file with some general project information.

1. Set the start date of the project.
 - a) On the ribbon, select **Project→Project Information**.
 - b) In the **Start date** text box, type *August 3, 2020*
2. Schedule the project from the start date.
 - a) In the **Schedule from** text box, ensure that **Project Start Date** is entered.
 - b) Select **OK**.
3. Update the properties of the project with your new information.
 - a) On the ribbon, select **File→Info**.
 - b) Select **Project Information→Advanced Properties**.
Verify that the **My HR Manual** dialog box opens.
 - c) Select the **Summary** tab if it is not already selected.

d) In the text fields, enter the appropriate information as depicted in the following image.



The image shows a dialog box titled "My HR Manual.mpp Properties" with a question mark and a close button in the top right corner. The dialog has five tabs: "General", "Summary", "Statistics", "Contents", and "Custom". The "Summary" tab is selected. The fields are filled with the following text:

- Title: My HR Manual.mpp
- Subject: Human Resources Manual
- Author: My Name
- Manager: My Manager
- Company: Greene City National Bank
- Category: (empty)
- Keywords: training HR human resources
- Comments: (empty)
- Hyperlink base: (empty)
- Template: (empty)

At the bottom left, there is a checkbox labeled "Save preview picture" which is currently unchecked. At the bottom right, there are two buttons: "OK" and "Cancel".

e) Select **OK**.

4. On the ribbon, select **File**→**Save** and leave the file open.
