

# TOPIC C

## Assign a Project Calendar

When you create a new project plan, Microsoft Project assumes that your project tasks will be performed during a standard work week. In reality, however, your project tasks may be performed during a longer or shorter work week. You may also have to take into account holidays and vacation schedules. In this topic, you will modify the project calendars in Microsoft Project so that they reflect the realities of your particular project.

### Project Calendars

Microsoft Project uses calendars to determine when to schedule tasks and when resources will be available to perform work. The *project calendar* is the calendar that determines the overall schedule of a project. For example, if you have defined your organization's holidays in the project calendar, the end date that Project calculates for your project will automatically adjust so that your project will end on a workday. Although the project calendar applies to the project as a whole, you can also assign calendars to individual resources or tasks.

### Base Calendars

A *base calendar* defines the working days and working hours in a calendar that can be assigned to the project. The **Project Information** dialog box shows the base calendar assigned to your project in the **Calendar** field. Microsoft Project gives you three built-in base calendars from which to choose.

<i>Base Calendar</i>	<i>Description</i>
<b>Standard</b>	8:00 AM to 12:00 PM 1:00 PM to 5:00 PM Monday through Friday
<b>Night Shift</b>	12:00 AM to 3:00 AM 4:00 AM to 8:00 AM 11:00 PM to 12:00 AM Tuesday through Friday 12:00 AM to 3:00 AM 4:00 AM to 8:00 AM Saturday
<b>24 Hours</b>	24 hours a day 7 days a week

The **Standard** base calendar is the default for all new files in Microsoft Project. You can change the base calendar to one of the other options in the **Calendar** drop-down list.

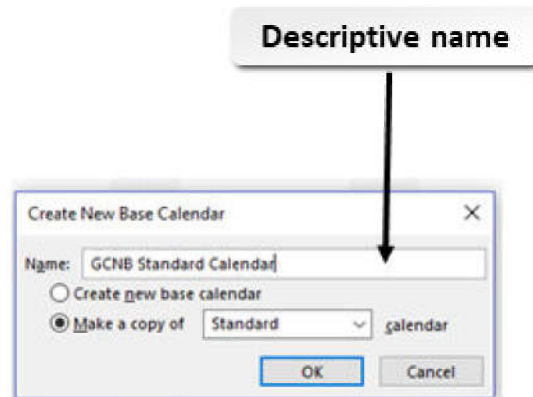
### Calendar Types

Project provides various types of calendars to define the working hours or days, and nonworking time for an entire project, or even for individual resources and tasks.

<i>Calendar Type</i>	<i>Description</i>
<b>Project calendar</b>	The base calendar that specifies the default working and nonworking times for a project. The <b>Standard</b> base calendar is the default project calendar.
<b>Resource calendar</b>	A calendar created to specify the working and nonworking times for an individual resource when exceptions from the base calendar exist. The <b>Standard</b> base calendar is the default resource calendar.
<b>Task calendar</b>	A calendar applied to an individual task created to control the scheduling of a task when exceptions from the base calendar exist. By default, all tasks are scheduled according to the project calendar.

## The Create New Base Calendar Dialog Box

You can use the *Create New Base Calendar dialog box* to create a new base calendar for your project by copying an existing base calendar and then changing it to fit your needs. You can access the **Create New Base Calendar** dialog box by selecting the **Change Working Time** button from the **Project** tab, and then selecting **Create New Calendar**.



*Figure 2–6: Copy a base calendar using the Create New Base Calendar dialog box.*



**Note:** Make sure to name your calendars descriptively so they are easy to choose later.

## The Change Working Time Dialog Box

Every organization has its own working hours. If your organization’s working and nonworking hours differ from the default hours of the base calendar, you can create a base calendar and apply it to the project. To plan your project accurately, you’ll also need to specify any holidays that your company observes—the default base calendar does not include holidays.

*Working time* is whenever labor is being performed on a project, on a task, or by a resource. Conversely, nonworking time is when labor is not being performed. You can modify working time by selecting the **Project** tab on the ribbon, and then selecting the **Change Working Time** button in the **Properties** command group. The *Change Working Time dialog box* enables you to make changes to the selected base calendar.

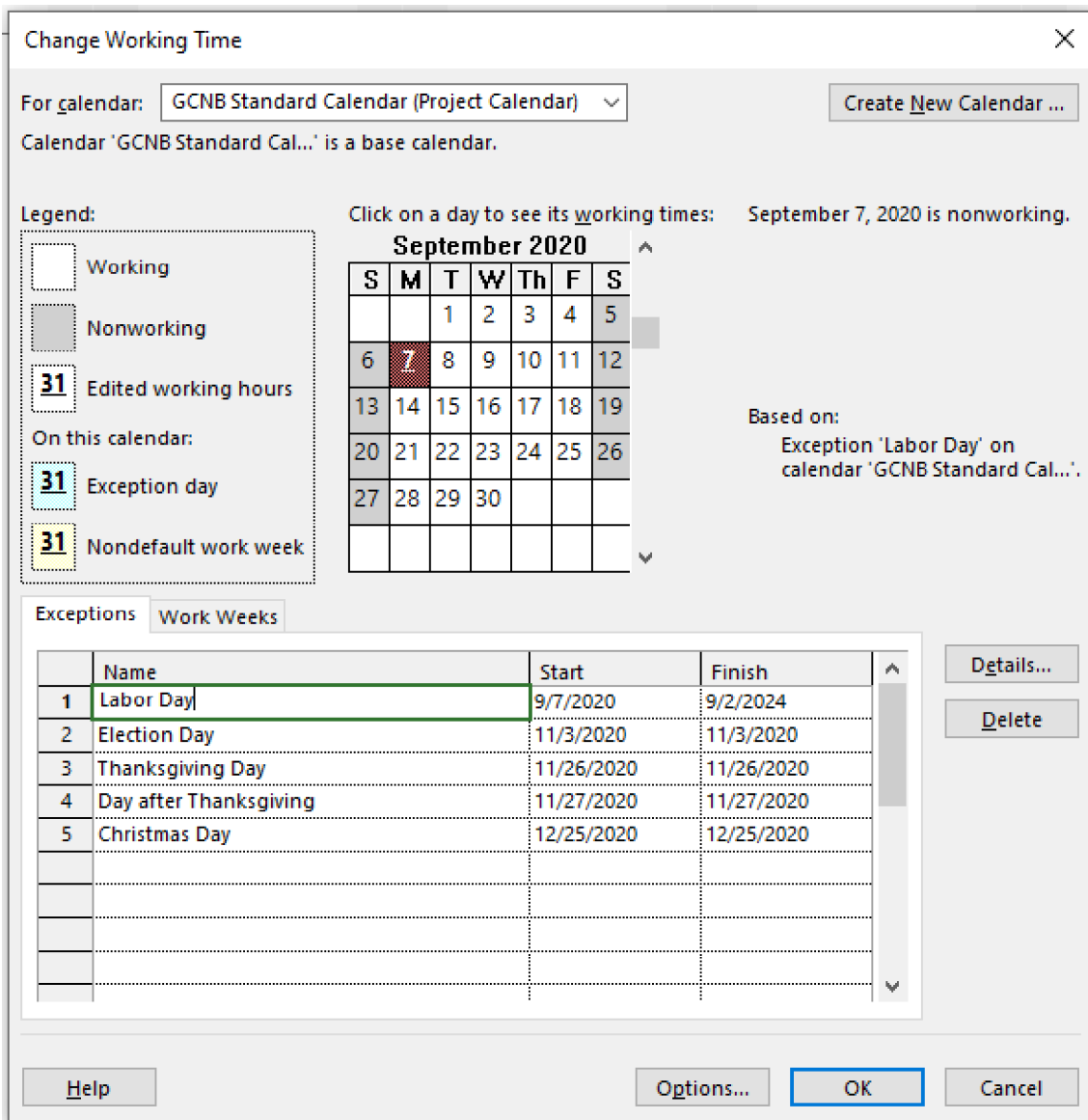




Figure 2-7: Make changes to working time in the Change Working Time dialog box.

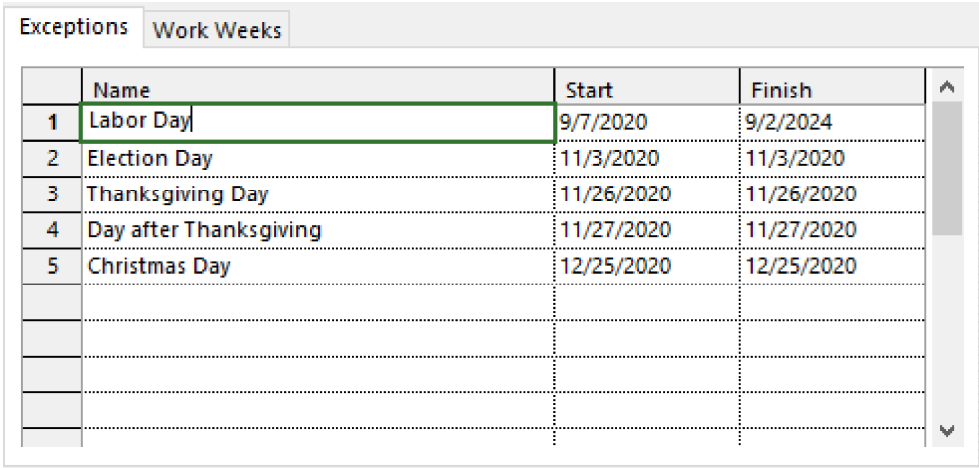
The **Change Working Time** dialog box displays a miniature calendar of the project's base calendar. The **Legend** to the left of the miniature calendar briefly explains the coding used on the miniature calendar. The following table expands on the **Legend**.

Item	Icon	Meaning
Working	<input type="checkbox"/>	Labor is being performed on this date.
Nonworking	<input type="checkbox"/>	Labor is not being performed on this date. Weekends and holidays are typically nonworking dates.
Edited working hours	<input type="checkbox"/> 31	The period of time when labor is being performed on this date is different than a normal working day.

Item	Icon	Meaning
Exception day		Working hours on this date are different than usual. For example, an organization might only be open during the morning on the day before a major holiday.
Nondefault work week		Working hours during this entire week are different than usual. For example, an organization might be completely shut down for a week.

## Exceptions


In Microsoft Project, an **exception** is a day or week when working time is different than what is normal for the base calendar. All exceptions to the base calendar are displayed in a table at the bottom of the **Change Working Time** dialog box.




	Name	Start	Finish
1	Labor Day	9/7/2020	9/2/2024
2	Election Day	11/3/2020	11/3/2020
3	Thanksgiving Day	11/26/2020	11/26/2020
4	Day after Thanksgiving	11/27/2020	11/27/2020
5	Christmas Day	12/25/2020	12/25/2020

**Figure 2–8:** An exception to the base calendar might occur for a holiday.

You can add an exception to the base calendar by selecting a date or dates on the miniature calendar in the **Change Working Time** dialog box and entering a name for the exception in the **Exceptions** table. For example, if your organization is closed for the Thanksgiving holiday, you would select the fourth Thursday of November in the miniature calendar and enter **Thanksgiving** in the highlighted cell of the **Exceptions** table.



**Note:** Microsoft Office also enables you to change the normal work week for a base calendar using the **Work Weeks** tab in the **Change Working Time** dialog box. For example, you can change the work week from the default of Monday–Friday to Tuesday–Saturday. This is an advanced skill that is not covered in this course. For more information, type **Change working days for the project calendar** in the **Tell Me** feature.



**Note:** To learn more about work-week customization, check out the Spotlight on **Changing the Work Week in Project** presentation from the **Spotlight** tile on the **CHOICE** Course screen.

## Working Time vs. Nonworking Time

By default, whenever you add an exception to the base calendar, Microsoft Project assumes that the entire day is nonworking time. However, let's say your organization will only be open from 8:00 A.M. to 12:00 P.M. on Christmas Eve. You can make some of the day working time and some of

the day nonworking time by selecting the exception in the **Exceptions** table and then selecting **Details**.

Details for 'Labor Day'

Set working times for these exceptions

Nonworking

Working times:

	From	To

Recurrence pattern

Daily

Weekly

Monthly

Yearly

On

The   of

Range of recurrence

Start:

End after:  occurrences

End by:

Help OK Cancel

**Figure 2-9: Setting working time vs. nonworking time for an exception.**

In addition to changing working time to nonworking time, you can also select the time periods that will be working or nonworking. You can also select a recurrence pattern and the range of recurrence.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Work with Project Calendars.

# ACTIVITY 2-4

## Assigning a Calendar to a Project

### Before You Begin

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


### Scenario


The Greene City National Bank observes several federal holidays where no project work will be scheduled. Also, work is only scheduled for half a day on Election Day. You decide to add these holidays to a new base calendar, and then assign that as the project calendar to make the schedule more accurate.

#### 1. Create a copy of the **Standard** calendar.

- a) On the ribbon, select **Project→Change Working Time**.
- b) In the **Change Working Time** dialog box, select **Create New Calendar**.
- c) In the **Create New Base Calendar** dialog box, in the **Name** field, enter *GCNB Standard Calendar*
- d) In the **Make a copy of** field, select **Standard Calendar**.
- e) Select **OK**.  
Verify that the **Change Working Time** dialog box is open and that the **For calendar** field is set to **GCNB Standard Calendar**.

#### 2. Add federal holidays as exceptions.

	<b>Note:</b> A frequently asked question is, "Can holidays be imported from the Outlook calendar?" Unfortunately, the answer is no.
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	<b>Note:</b> You can also type the name of the exception in the <b>Exceptions</b> table, then use the date picker in the <b>Start</b> field.
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- a) Navigate the calendar to September 2020.
  - b) Select **Monday, September 7, 2020**.
  - c) In the **Exceptions** table, in the **Name** column, select the highlighted cell.
  - d) Type *Labor Day* and press **Enter**.
  - e) Add the following exceptions to the project calendar:
    - Tuesday, November 3, 2020, Election Day
    - Thursday, November 26, 2020, Thanksgiving Day
    - Friday, November 27, 2020, Day after Thanksgiving
    - Friday, December 25, 2020, Christmas Day
- #### 3. Change the working time of Election Day.
- a) In the **Exceptions** table, select **Election Day**.
  - b) Select **Details**.
  - c) In the **Details for 'Election Day'** dialog box, select the **Working times** radio button.
  - d) In the **Working times** table, select the second row (**1:00 PM-5:00 PM**).
  - e) Select **Delete** to remove the second row.
  - f) Select **OK** to close the **Details for 'Election Day'** dialog box.

#### 4. Set a recurrence pattern.

- a) In the **Exceptions** table, select **Labor Day**.
- b) Select **Details**.
- c) In the **Details for 'Labor Day'** dialog box, in the **Recurrence pattern** section, select the **Yearly** radio button.
- d) Select the **The First Monday of September** radio button.
- e) Select the **End after** radio button.
- f) Change the number of occurrences from **1** to **5** to allow your project to end after 5 years.
- g) Select **OK** to close the **Details for 'Labor Day'** dialog box.
- h) Select **OK** to close the **Change Working Time** dialog box.

**5. Assign GCNB Standard Calendar as the project calendar.**

- a) Select **Project→Project Information**.
- b) In the **Project Information for 'My HR Manual'**, from the **Calendar** drop-down list, select **GCNB Standard Calendar**.
- c) Select **OK**.

**6. Save your changes to My HR Manual.mpp and close it.**

- a) On the ribbon, select **File→Save**.
  - b) Select **File→Close**.
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## Summary

In this lesson, you created one new project from a template and another one from scratch. In the new "from scratch" project, you set the project's start date. You captured relevant information in the project's properties, and you created a base calendar to reflect your organization's working schedule. By practicing the good habit of properly defining your project plan, you ensure that the plan will be easily understandable and maintainable throughout the life of the project. Over time, you will build a library of solid project plans that you and your organization can draw upon to improve future projects.

**Why might you create a new project from a template instead of a blank project plan?**

**What exceptions to the base calendar will you add to your next project? Will they be recurring?**



**Note:** Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.