

# Introduction to MS Project

Software solution for your project planning and managing

MS Project



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**UNIVERSITY**

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ADMINISTRATION IN KARVINA

Project Management

## How the lecture will be conducted?

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1. The lecture is divided into **three blocks**, where each block introduces an issue (setting up your project in MS Project)
  2. Then an **example of a project** in MS Project is presented. After each block there is a quiz for feedback on whether you have understood everything.
  3. We use **MS Teams**, a shared whiteboard for your engagement and reactions.
  4. The class is supplemented with **quizzes in vevox**, the link is always in the presentation.
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## 1. **PART** (30 min.)

- Demonstrating the importance of software usage in project planning.

## 2. **PART** (30 min.)

- Demonstration of basic project setup in MS Project. Students try their own project setup (templates, new project) with MS Project.

## 3. **PART** (30 min.)

- Explaining project settings (calendar, schedule), individual tabs and functionalities using a project example
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## Learning objectives

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After studying this topic, you should be able to:

- You will understand the logic of the application and the step-by-step creation of the project.
  - Perform basic setup of your project in MS Project.
  - Phase a project into multiple phases, understand the importance of phasing a project and dividing it into multiple parts.
  - Work through the basic definition and setup of a project in MS project.
  - Understand the importance of software support in project planning.
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# Key readings

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You can find support in the following sources:

- Book – Chatfield and Johnson (2016). MS Project 2016 Step by Step (Part 1, Part 2, Part 3)
- [https://www.tutorialspoint.com/ms\\_project/ms\\_project\\_create\\_new\\_plan.htm](https://www.tutorialspoint.com/ms_project/ms_project_create_new_plan.htm)
- <https://ppm.express/blog/newbie-guide-how-to-start-using-microsoft-project-in-2023/>

MS Project Tutorials – basic setup and calendars:

- <https://www.youtube.com/watch?v=sYy-iFzz1Eo>
  - [https://www.youtube.com/watch?v=tuCrTKMPu\\_Y](https://www.youtube.com/watch?v=tuCrTKMPu_Y)
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# Learning tutorials

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[https://www.tutorialspoint.com/ms\\_project/ms\\_project\\_quick\\_guide.htm](https://www.tutorialspoint.com/ms_project/ms_project_quick_guide.htm)

<https://support.microsoft.com/en-gb/office/basic-tasks-in-project-8fdbf020-a9e1-45e4-bf15-23a8d2b6797d>

<https://ppm.express/blog/newbie-guide-how-to-start-using-microsoft-project-in-2023/>

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# PART 1

## Planning with the computer

Everything in our life is a project – small, medium, or large it's always the same steps, but the different scopes of work and efforts.



- When we talk of project management, we refer to the application of skills, processes, methods, knowledge, and experience to achieve your project goals. It ensures that the final deliverables are constrained to specific reasonable timelines and budgets.
- You need the right instruments or tools to successfully manage your PM activity.
- Various programs exist for this purpose, the key among them being Microsoft Project.
- A planning program is indispensable if larger projects need to be planned on a regular basis. Besides planning activities over time, the costs of a project are also monitored with MS Project software.



# Microsoft Project



- The Microsoft Project is a good option if you're looking for a powerful project management tool that enables teams to organize and manage their projects of all sizes.
- Project managers using MS Project Desktop save their information as mpp files, so they can share it with other team members to use it separately when the project evolves; or they export it to MS Project Online to use it on cloud-based software.
- MS Project Online targets multiple users where you can assign tasks, track time, and look into other related project elements. The desktop version targets mainly project managers who get to use it in defining and tracking tasks.

## STRENGTHS

**Integration** – Works seamlessly with dominant technologies such as [Power BI](#), [Microsoft Teams](#), Microsoft SharePoint, MS 365 Office Suite, and Skype (but in an advanced Professional pricing plan)

**Flexibility** – Flexible project management software that can be extended to other requirements like financial management and road mapping.

**Customer support** – Users have access to reliable customer support from partners, consultants, and third-party providers.

## WEAKNESSES

**Training needed** – You cannot just start using MS Project without proper professional training. The complex UX needs a sufficient amount of time to learn about it.

**Cost limitation** – Small businesses are often unable to adopt the software due to the cost factor. Buying a license for on-premise may prove challenging.

**File compatibility** – Since MS Project files are saved in a proprietary format, desktops that do not have the software cannot open.

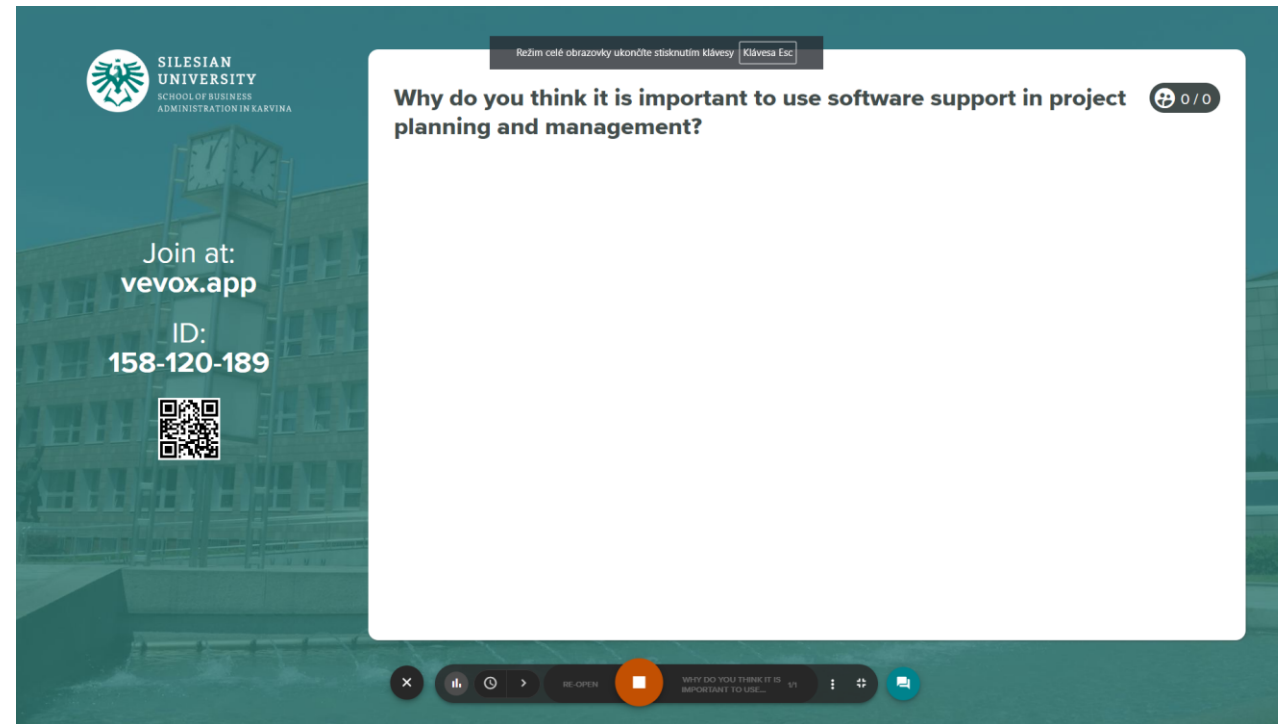


# Why software solution for project management?



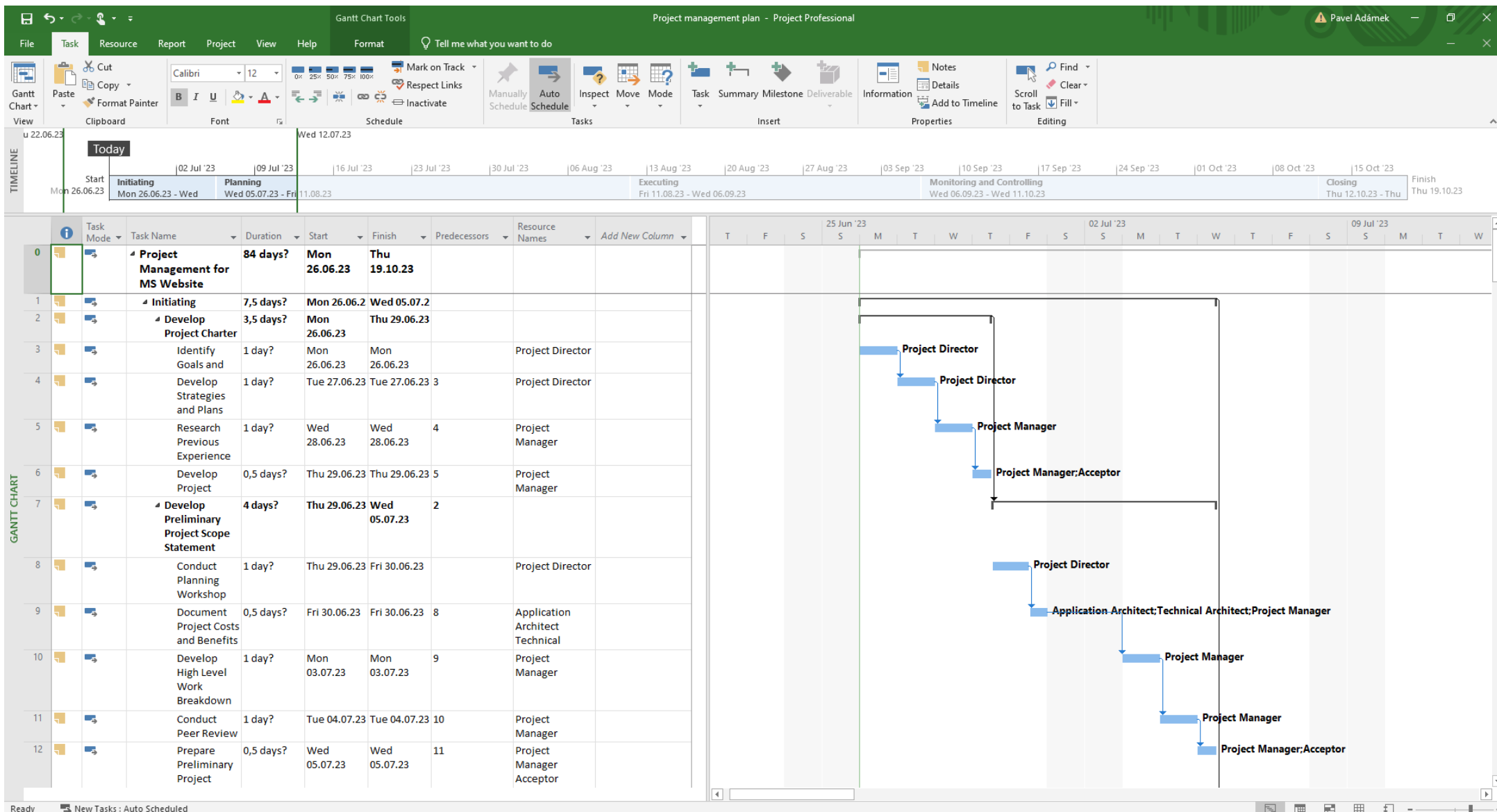
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# Vevox questions



The screenshot shows a Vevox poll interface. On the left, there is a teal sidebar with the Silesian University logo and text: "Join at: **vevox.app**", "ID: **158-120-189**", and a QR code. The main area is white and contains the question: "Why do you think it is important to use software support in project planning and management?". Above the question, there is a small grey box with the text "Režim celé obrazovky ukončíte stisknutím klávesy Klávesa Esc". To the right of the question is a "0/0" indicator. At the bottom, there is a control bar with various icons for navigation and a small preview of the question text.

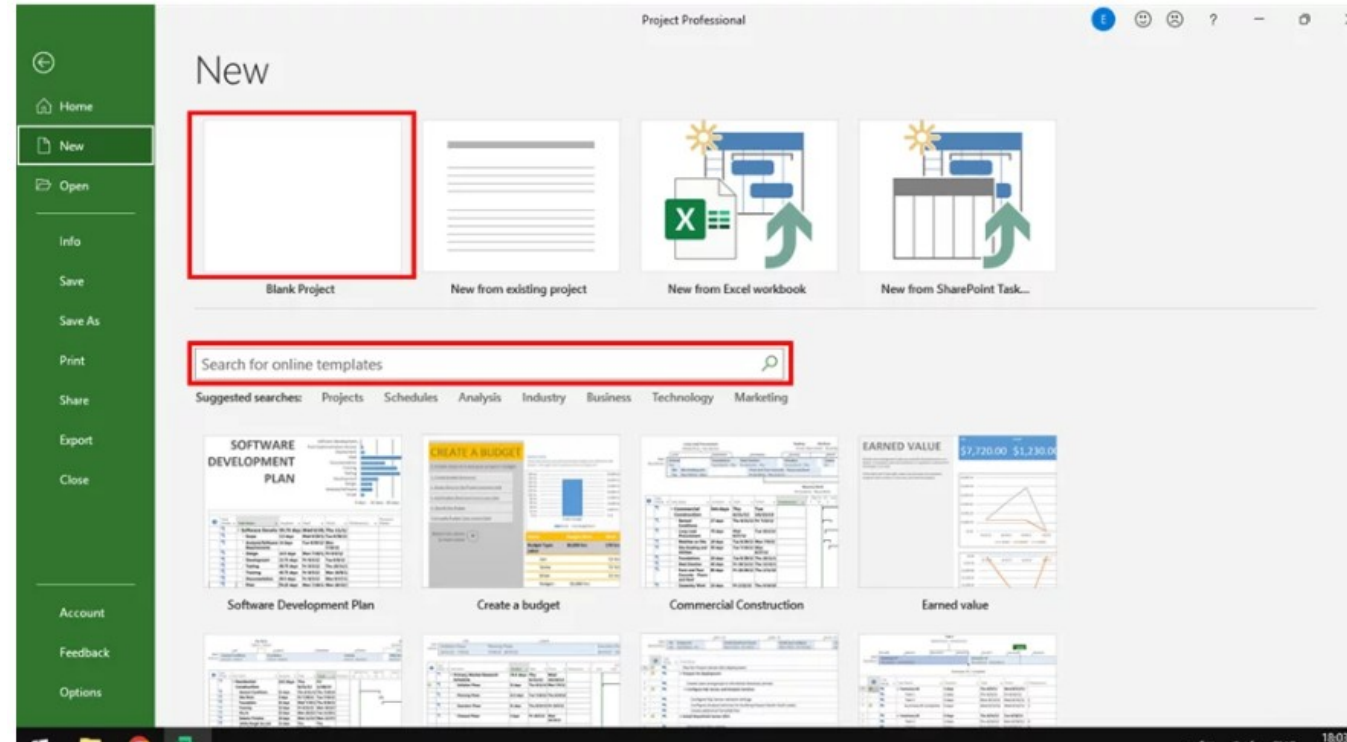
# What does a project look like in MS Project?



# How to create and manage your project schedule



- After you complete the initial thinking about your project's objectives, it's time to put together a schedule.
- When you start a new schedule, you add tasks and organize them efficiently so that the project end date occurs as soon as possible. So, the first step will be to create a new project (let's start from the beginning).
- You can start by creating a new project from a template – many of these templates have been created by industry experts to help you get started.



# How to create and manage your project schedule



- The user interface of MS Project is given by tabs, which are designed to be used in relation to the different phases of the project lifecycle: the **Project** tab for setting up the project, the **Task** and **Resource** tabs for scheduling and tracking, respectively, and the **Report** and **View** tabs are helpers when preparing project status reports or printouts.

The image displays three screenshots of the Microsoft Project software interface, illustrating the different tabs and their associated Gantt charts.

**Top Screenshot (Resource Tab):** Shows the 'Resource' tab selected. The ribbon includes 'Team Planner', 'Assign Resources', 'Resource Pool', 'Add Resources', 'Information', 'Notes', 'Details', 'Level Selection', 'Level Resource', 'Level All', 'Leveling Options', 'Clear Leveling', and 'Next Overallocation'. The Gantt chart shows a task starting on Monday, 26.06.23, with sub-tasks 'Initiating' (Mon 26.06.23 - Wed 05.07.23) and 'Planning' (Wed 05.07.23 - Fri 11.08.23). The 'Today' marker is positioned on Wednesday, 12.07.23.

**Middle Screenshot (Project Tab):** Shows the 'Project' tab selected. The ribbon includes 'Subproject', 'My Add-ins', 'Project Information', 'Custom Fields', 'Links Between Projects', 'WBS', 'Change Working Time', 'Calculate Project', 'Set Baseline', 'Move Project', 'Update Project', 'Status Date', 'Spelling', and 'Proofing'. The Gantt chart shows a task starting on Monday, 26.06.23, with sub-tasks 'Initiating' (Mon 26.06.23 - Wed 05.07.23) and 'Planning' (Wed 05.07.23 - Fri 11.08.23). The 'Today' marker is positioned on Wednesday, 12.07.23.

**Bottom Screenshot (Task Tab):** Shows the 'Task' tab selected. The ribbon includes 'Gantt Chart', 'Paste', 'Format Painter', 'Clipboard', 'Font', 'Schedule', 'Mark on Track', 'Respect Links', 'Inactivate', 'Manually Schedule', 'Auto Schedule', 'Inspect', 'Move', 'Mode', 'Task', 'Summary Milestone Deliverable', 'Information', 'Details', 'Add to Timeline', 'Find', 'Clear', 'Fill', and 'Scroll to Task'. The Gantt chart shows a task starting on Monday, 26.06.23, with sub-tasks 'Initiating' (Mon 26.06.23 - Wed 05.07.23) and 'Planning' (Wed 05.07.23 - Fri 11.08.23). The 'Today' marker is positioned on Wednesday, 12.07.23.

# How to create and manage your project schedule



- The **File** tab then acts as an access point to Backstage. In this interface, we work with the project file and change the application's behavior settings.
- Specifically, we find here tools for saving the file to different formats, print control, means for securing with server solutions (SharePoint server, Project Server).
- The options dialog allows you to change the generic properties of MS Project. It is possible to specify data calculation methods (e.g. conditions for critical path calculation or time unit conversions), modify data display (date, time), or change standard application settings (effort-driven function, scheduling mode selection), etc. MS Project UI.

The screenshot displays the Microsoft Project Professional interface. The main window shows a Gantt chart for a project titled "Project Management for MS Website". The chart is set to "Today" (22.06.23) and shows a total duration of 84 days, starting on Monday, 26.06.23, and ending on Thursday, 19.10.23. The tasks are listed in a table below the chart:

Task ID	Task Name	Duration	Start	Finish
0	Project Management for MS Website	84 days?	Mon 26.06.23	Thu 19.10.23
1	Initiating	7,5 days?	Mon 26.06.23	Wed 05.07.23
2	Develop Project Charter	3,5 days?	Mon 26.06.23	Thu 29.06.23
3	Identify Goals and	1 day?	Mon 26.06.23	Mon 26.06.23
4	Develop Strategies and Plans	1 day?	Tue 27.06.23	Tue 27.06.23
5	Research Previous Experience	1 day?	Wed 28.06.23	Wed 28.06.23
6	Develop Project	0,5 days?	Thu 29.06.23	Thu 29.06.23
7	Develop Preliminary Project Scope Statement	4 days?	Thu 29.06.23	Wed 05.07.23
8	Conduct Planning Workshop	1 day?	Thu 29.06.23	Fri 30.06.23
9	Document Project Costs and Benefits	0,5 days?	Fri 30.06.23	Fri 30.06.23
10	Develop High Level	1 day?	Mon 03.07.23	Mon 03.07.23

The "Project Options" dialog box is open, showing the "General" tab. The "User Interface options" section includes "ScreenTip style" set to "Show feature descriptions in ScreenTips". The "Project view" section shows "Default view" set to "Gantt with Timeline" and "Date format" set to "Wed 28.01.09". The "Personalize your copy of Microsoft Office" section shows "User name" as "Pavel Adámek" and "Initials" as "PA". The "Start up options" section has the checkbox "Show the Start screen when this application starts" checked.

# How to create and manage your project schedule



You can assign the lower part of the window to a data entry form in addition to a specific view.

To split the window, check the **Details** box on the View tab or on the **Task** and **Source** tabs in the **Properties** group, where you select **Split View**.

In the application, you can open multiple project files at once, or you can open a single project in multiple windows with different views. To switch between file windows, that is, to select different document windows to work with, use the Views tab in the Window group.

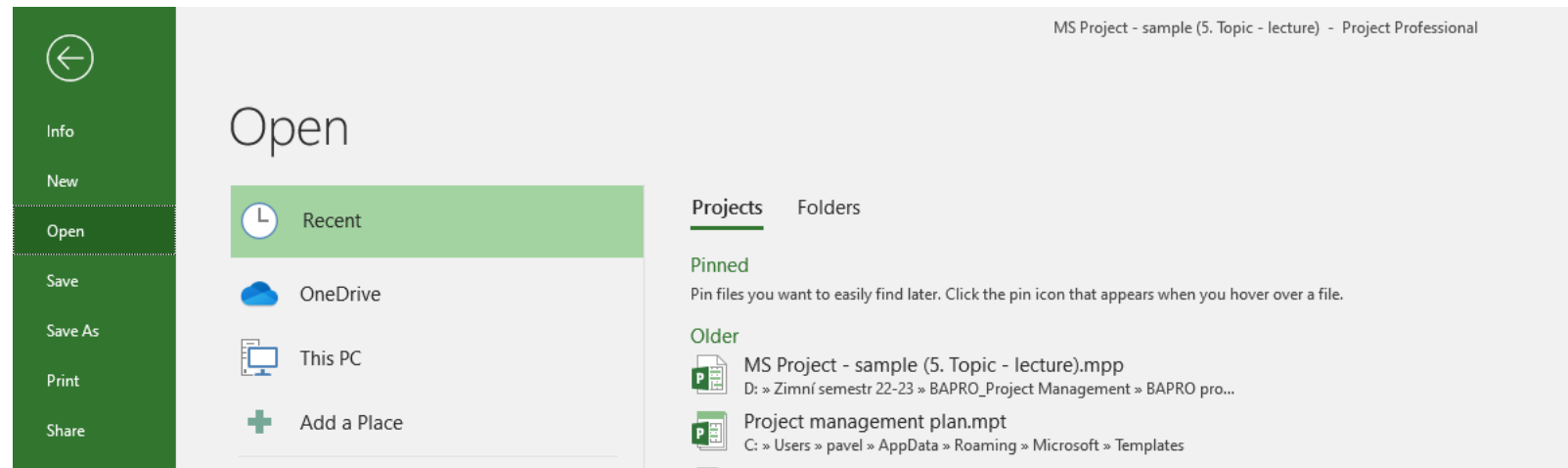
The screenshot displays the Microsoft Project Professional interface. The main window is split into two panes. The left pane shows a Gantt chart with tasks such as 'Project Management for MS Website', 'Initiating', 'Develop Project Charter', 'Identify Goals and Develop Strategies and Plans', 'Research Previous Experience', 'Develop Project', 'Develop Preliminary Project Scope Statement', 'Conduct Planning Workshop', and 'Document Project Costs and Benefits'. The right pane shows a resource usage form for the task 'Identify Goals and Objectives', which is assigned to 'Project Director'. The form includes fields for task name, duration, start/finish dates, and a table for resource assignments.

ID	Resource Name	Units	Work	ID	Predecessor Name	Type	Lag
1	Project Director	100%	8h				

# How to create and manage your project schedule



## Showing the project in MS Project (file MS Project sample – 5. Topic). File is in IS.





## PART 2

### Planning with the computer

Everything in our life is a project – small, medium, or large it's always the same steps, but the different scopes of work and efforts.



- When we talk of project management, we refer to the application of skills, processes, methods, knowledge, and experience to achieve your project goals. It ensures that the final deliverables are constrained to specific reasonable timelines and budgets.
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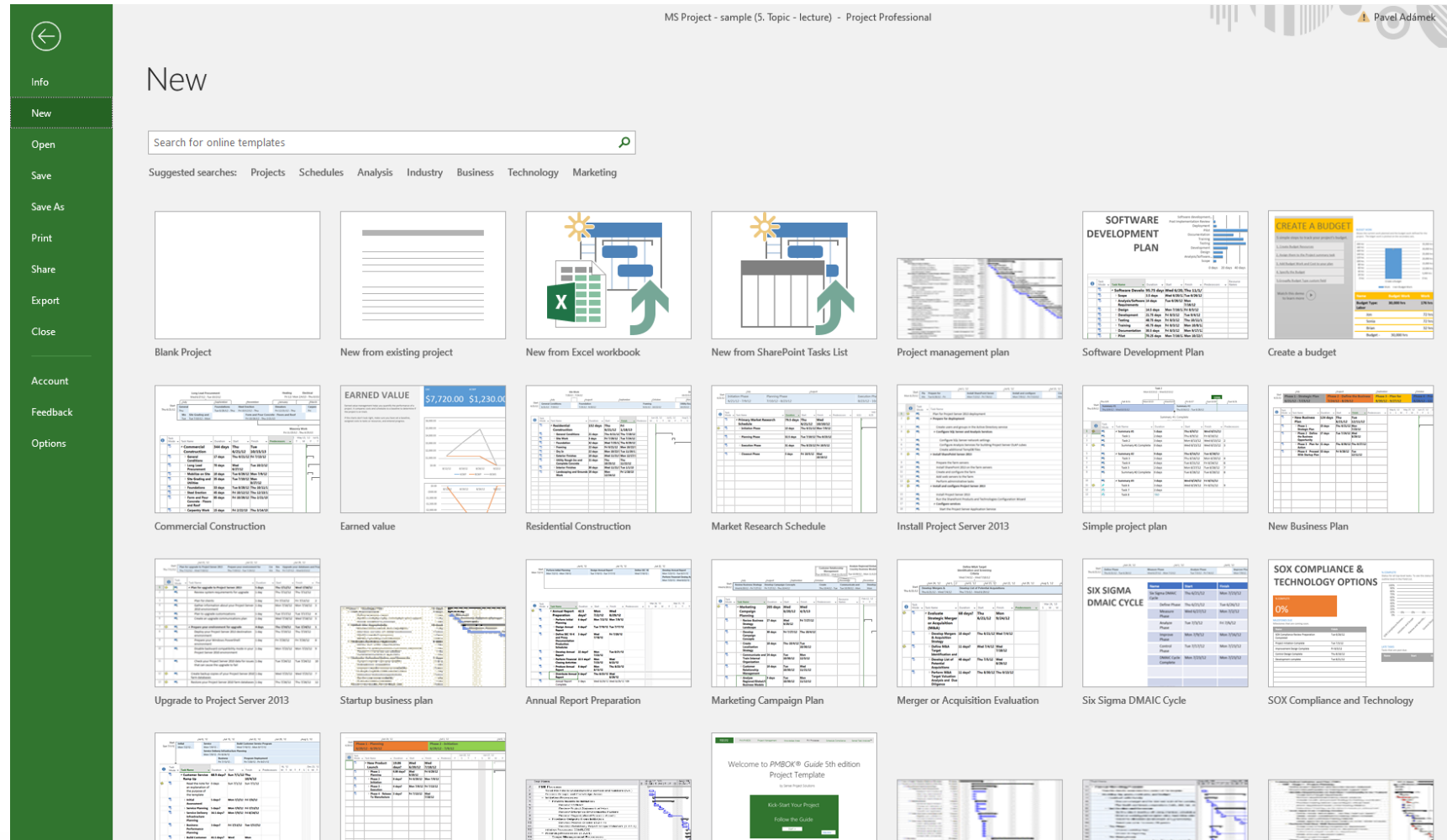
# Establishing a project



If you are creating a new project, you can do one of two things: you can either create a new project, or you can choose from a menu of project templates.

**Try the different templates!**

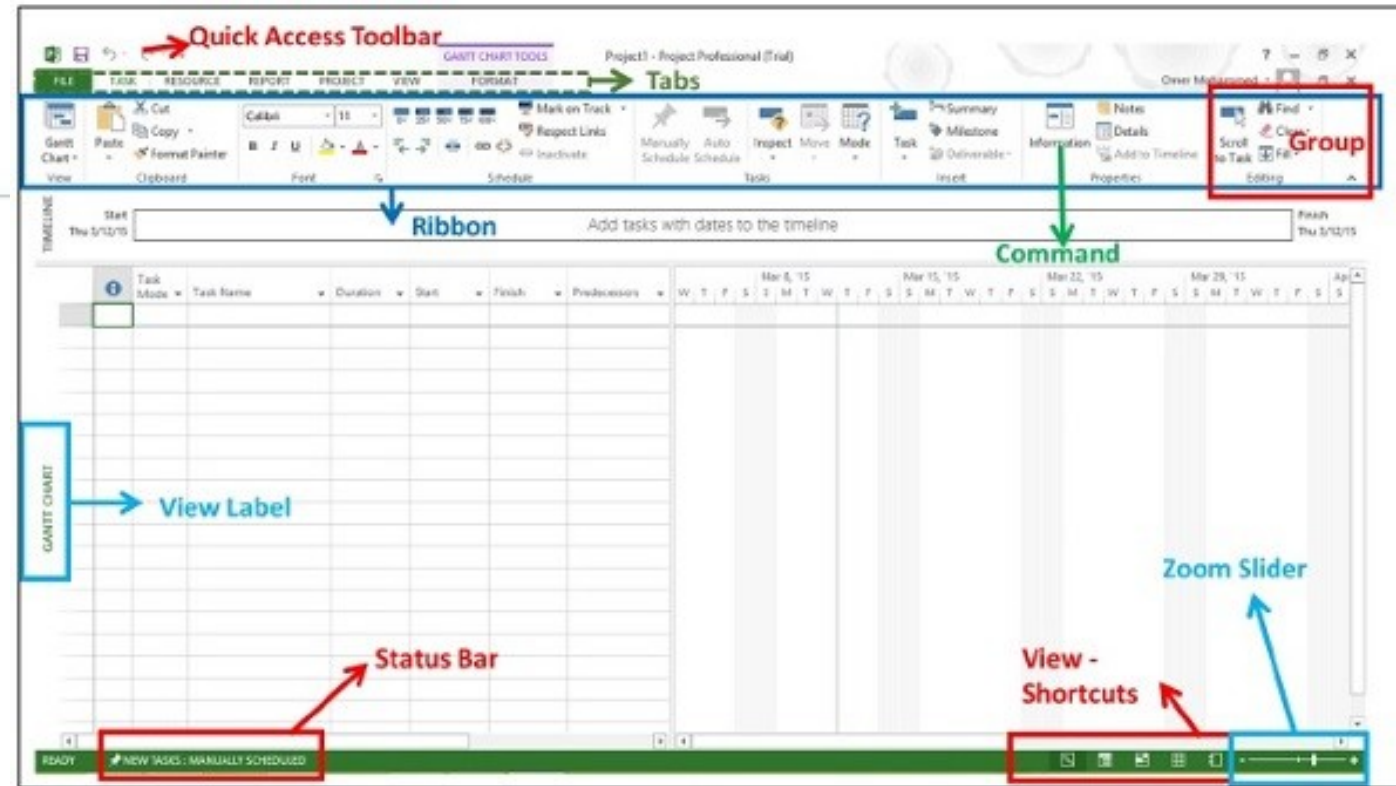
You can inspire you for structure of your project.



# Establishing a project MS Project UI

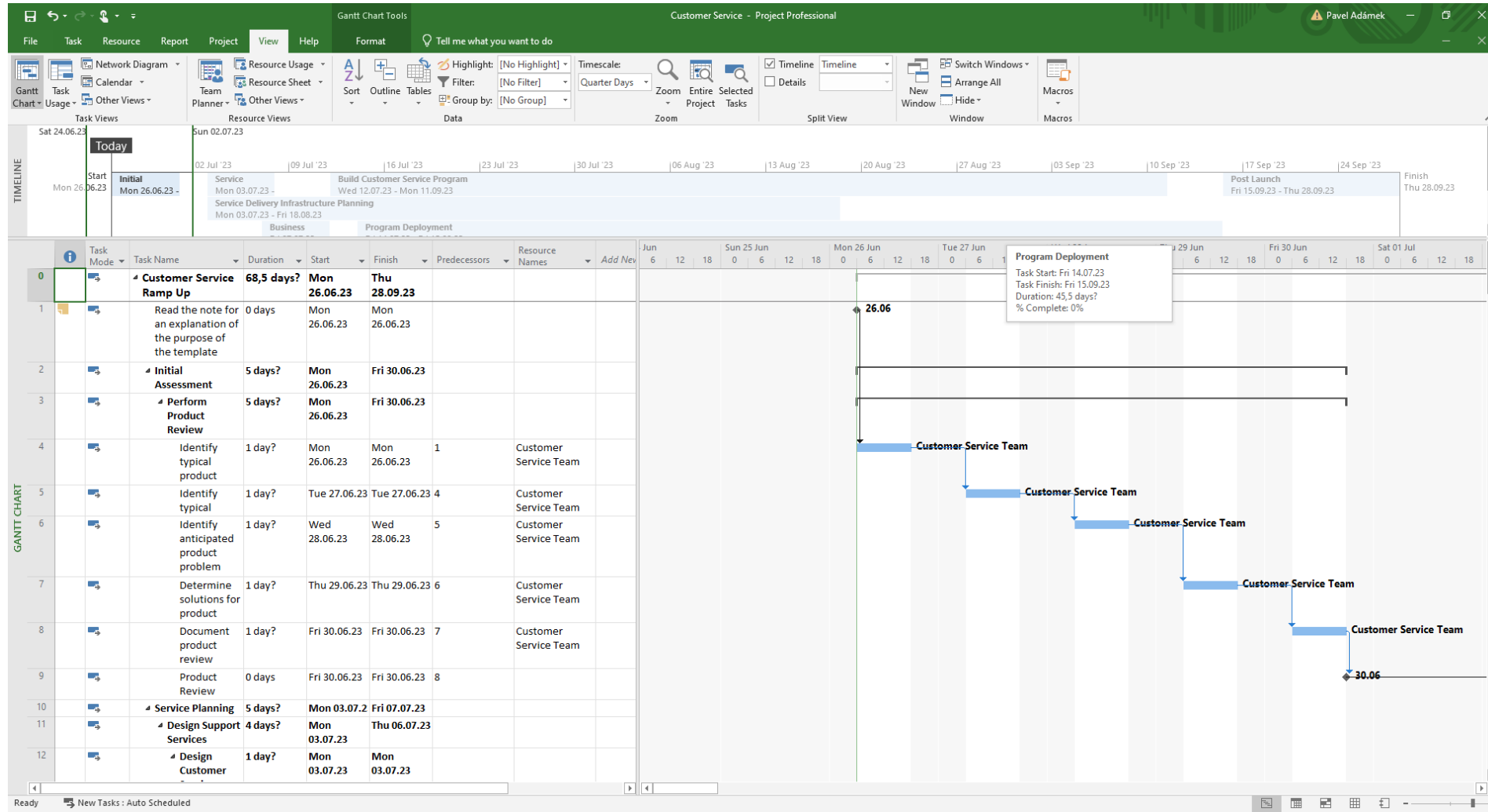
The screen should have the MS Project interface displayed. The major part of this interface are:

- Quick Access Toolbar – A customizable area where you can add the frequently used commands.
- Tabs on the Ribbon, Groups – the ribbon having multiple tabs, each holding a toolbar bearing buttons and occasionally other controls. Toolbar controls have heterogeneous sizes and are classified in visually distinguishable Groups.
- Commands – The specific features you use to perform actions in Project. Each tab contains several commands. If you point at a command you will see a description in a tooltip.

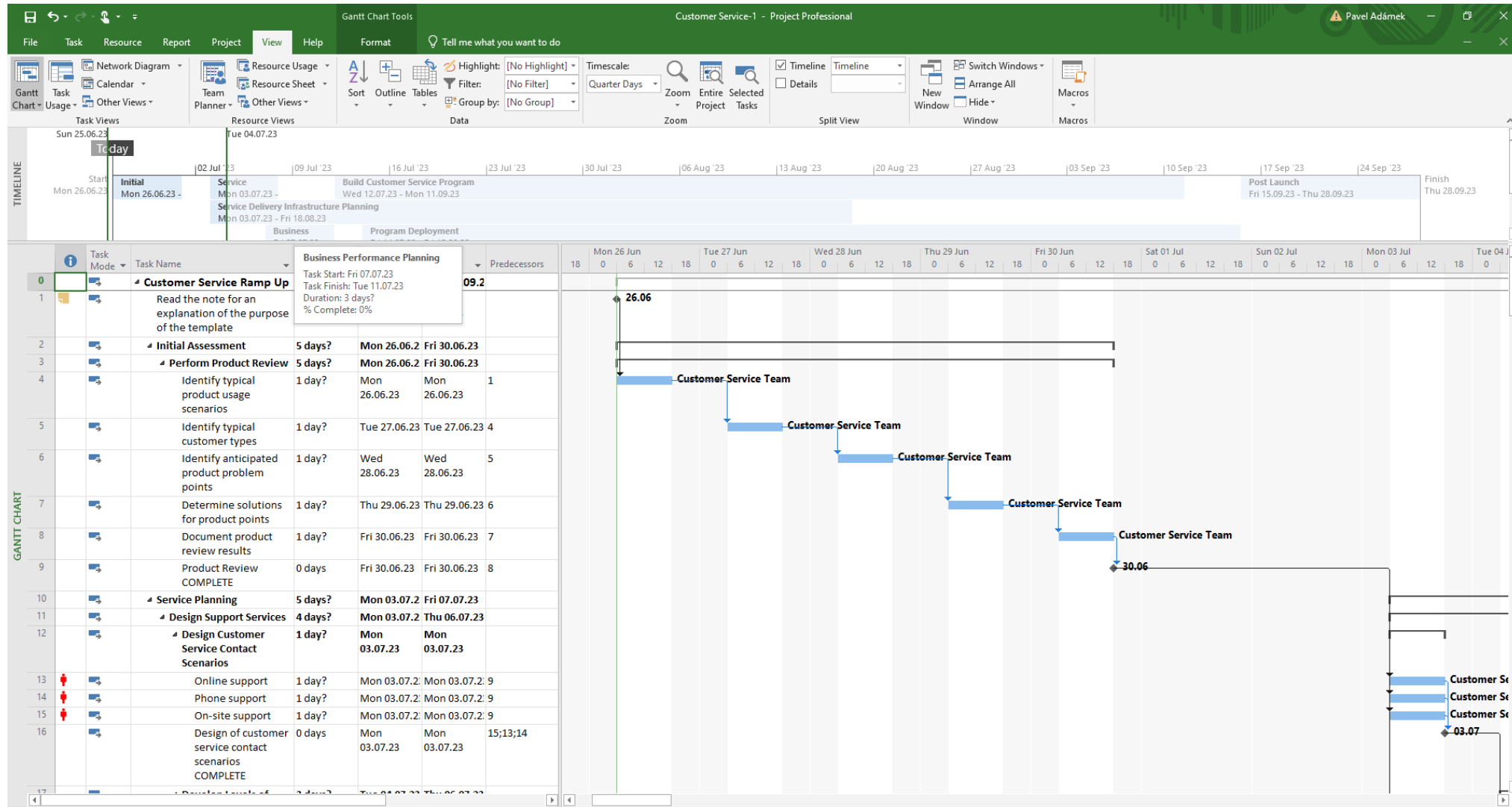


- View Label – This appears along the left edge of the active view. Project includes lots of views like Gantt Chart view, Network Diagram view, Task Usage view, etc.
- View Shortcuts – This lets you switch between frequently used views in Project.
- Zoom Slider – Simply zooms the active view in or out.
- Status bar – Displays details like the scheduling mode of new tasks (manual or automatic) and details of filter applied to the active view.

# Establishing a project MS Project UI - examples



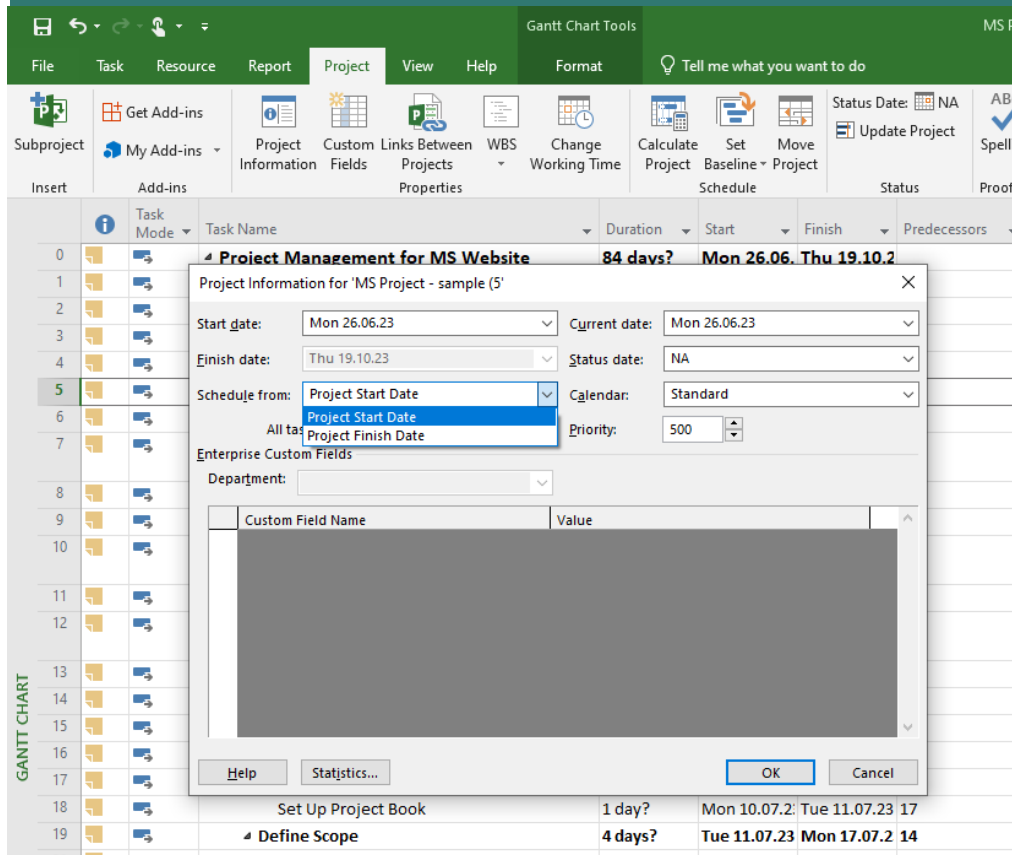
# Establishing a project MS Project UI - examples



# PART 3

## Project settings

### Tasks, calendars, links, gantt chart



#### Step 1

Projects are either planned from the project start date or from the project completion date.

For example, if you are launching a new product, this is usually done on a specific date (the completion date is more important than the start date).

Conversely, if you are building a house, for example, it is important to finish as soon as possible (usually not fixed to a specific completion date).

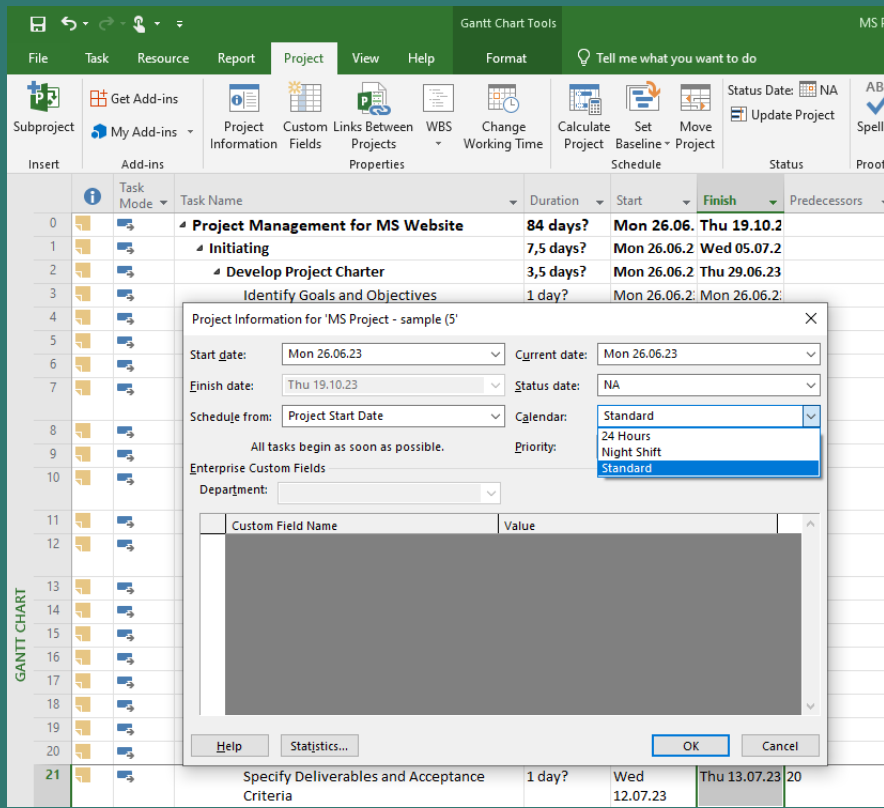
MS Project then calculates the start or completion dates based on the duration of the project.



# PART 3

## Project settings

### Tasks, calendars, links, gantt chart



## Step 2 - Set Up Calendar

Click Project tab → Properties Group → Project Information.

Click the arrow on the Current Date dropdown box. A list appears containing three base calendars.

- 24 Hour – A calendar with no non-working time.
- Night Shift – Covers 11 PM to 8 AM, night shifts covering all nights from Monday to Friday, with one hour breaks.
- Standard – Regular working hours, Monday to Friday between 8 AM to 5 PM, with one hour breaks.

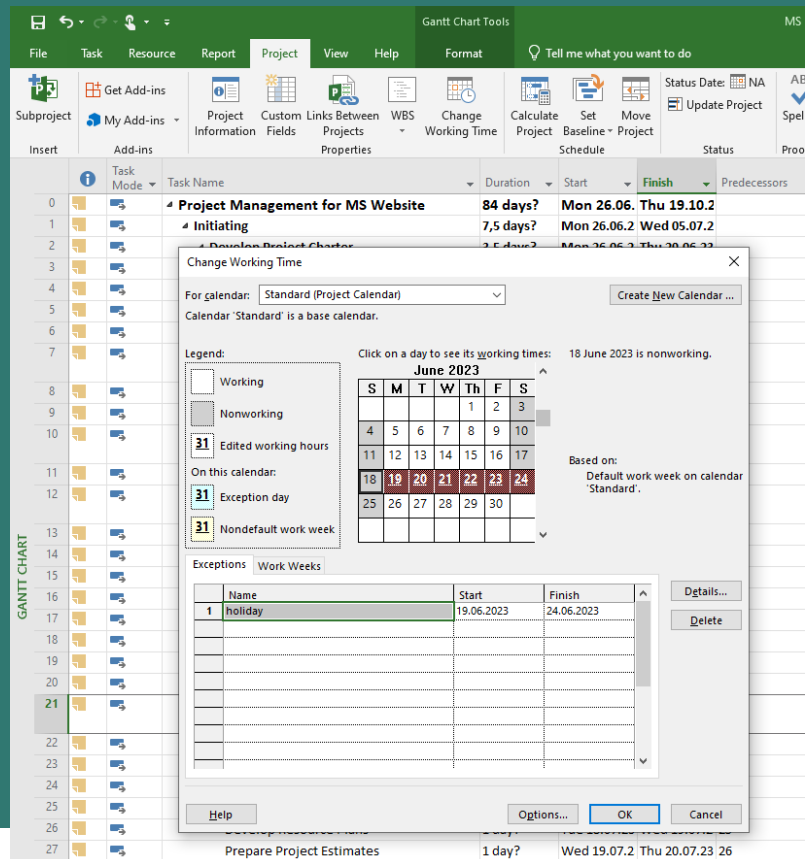




## PART 3

# Project settings

## Tasks, calendars, links, gantt chart



### Step 3: Adding Exceptions to Calendar

- Exceptions are used to modify a Project calendar to have a non-standard workday or a non-working day. You can also allot unique working hours for a particular resource as well.

- Here is an example to create a non-working day, which could be because of a holiday or office celebrations or events other than the standard office work effort.

- Click Project tab → Properties Group → Change Working Time

- Change Working Time dialog box appears. Under Exceptions Tab click on the Name Field, enter event as “Office Anniversary”.



# PART 3

## Project settings

### Tasks, calendars, links, gantt chart

The screenshot displays the Microsoft Project Professional interface. The main window shows a Gantt chart with tasks such as 'Project Management for MS Website', 'Initiating', and 'Develop Project Charter'. Overlaid on the interface are several dialog boxes: 'Assign Resources' (showing 'Project Manager' assigned to a task), 'Resource Information' (showing details for 'Project Manager'), and 'Change Working Time' (showing a calendar for June 2023 with working hours defined as 8:00 to 12:00 and 13:00 to 17:00).

## Step 4: Setting up Resource Calendar

- Just like you can change a Standard Base Calendar, you can change the work and non-working time for each resource. You can modify the resource calendar to accommodate flex-time, vacation time, training time, etc.
- Also remember, Resource Calendar can only be applied to work resources and not to material and cost resources.
- By default when we create the resources in a plan, the resource calendar matches the Standard base calendar. And any changes you make to the Project Calendar, gets reflected automatically in resource calendars, except when you create an exception in the resource calendar. In that case even if you update the project calendar, the exception in resource calendar is not affected.





# PART 3

## Project settings

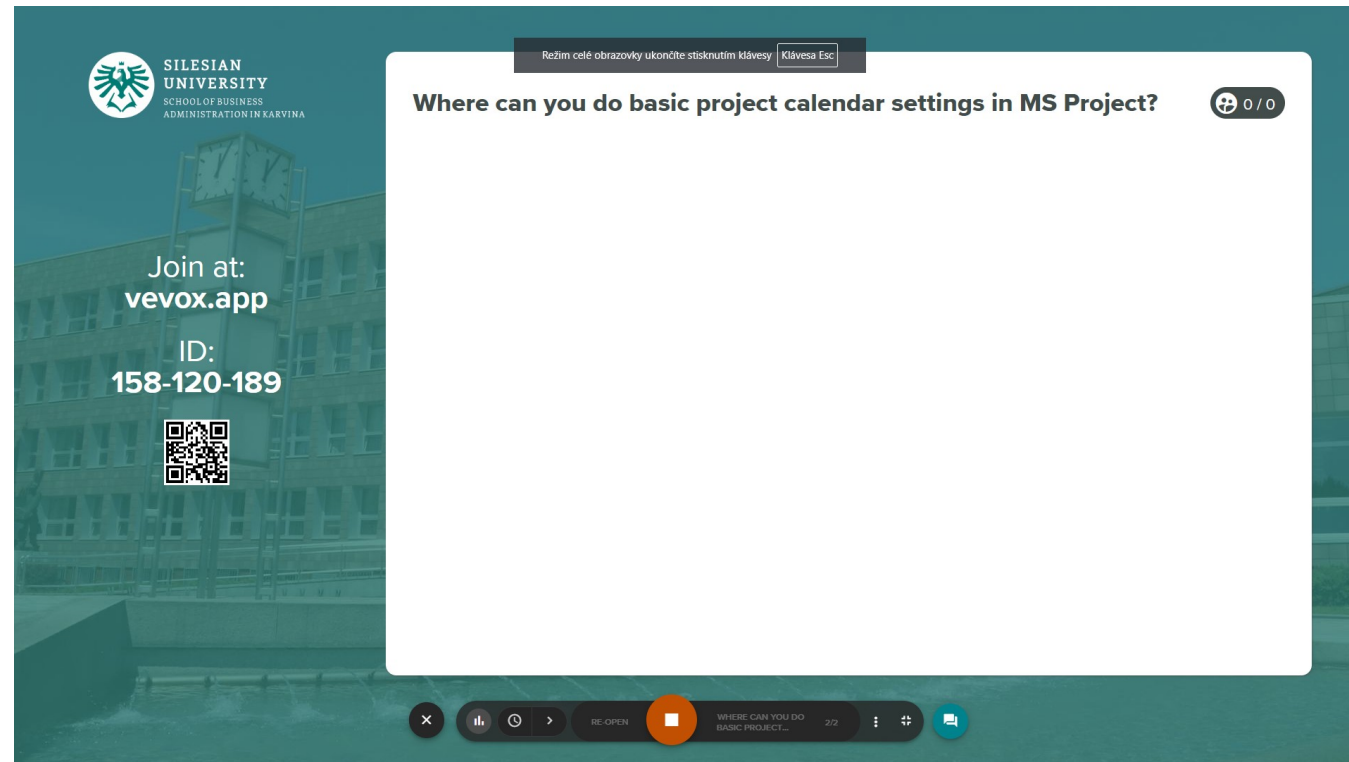
The screenshot displays the Microsoft Project Professional interface. The main window shows a Gantt chart for a project named 'Project Management for MS Website'. The 'Resource' tab is active, and the 'Change Working Time' dialog box is open for the resource 'Application Architect'. The dialog shows a calendar for June 2023 with Tuesday and Wednesday selected. The 'Work Weeks' tab is active, and the 'Set working times for these exceptions' section is visible. The 'Recurrence pattern' is set to 'Daily' with a range of '1' occurrence from 'Mon 26.06.23' to 'Mon 26.06.23'. The 'Range of recurrence' is set to '1' occurrence from 'Mon 26.06.23' to 'Mon 26.06.23'. The 'Set working times for these exceptions' section is visible, showing a grid for 'Nonworking' and 'Working' days. The 'Nonworking' section is selected, and the 'Set working times for these exceptions' section is visible. The 'Recurrence pattern' is set to 'Daily' with a range of '1' occurrence from 'Mon 26.06.23' to 'Mon 26.06.23'. The 'Range of recurrence' is set to '1' occurrence from 'Mon 26.06.23' to 'Mon 26.06.23'. The 'Set working times for these exceptions' section is visible, showing a grid for 'Nonworking' and 'Working' days. The 'Nonworking' section is selected, and the 'Set working times for these exceptions' section is visible.

## Step 5: Change Working times for Each Resource

- Click Project tab → Properties group → Click Change Working Time.
- The Change Working Time dialog box appears.
- Click the down arrow for the “For Calendar” dropdown box.
- Select the resource for whom you want to change work schedule.
- In the following screen you can see we have chosen John.
- Click “Work Weeks” tab.
- Double-click the [default] cell below the Name column heading.
- Under “Selected Day(s)” choose any day you want to change the work schedule.
- We have chosen Tuesday and Wednesday.
- Click Set day(s) to these specific working times. Change the time.



# Vevox questions



The screenshot shows a Vevox meeting interface. On the left, there is a teal background with the Silesian University logo and text: "SILESIA UNIVERSITY SCHOOL OF BUSINESS ADMINISTRATION IN KARVINA", "Join at: **vevox.app**", "ID: **158-120-189**", and a QR code. On the right, a white question card is displayed with the text "Where can you do basic project calendar settings in MS Project?" and a "0 / 0" indicator. At the top of the white card, there is a small grey box with the text "Režim celé obrazovky ukončíte stisknutím klávesy Klávesa Esc". At the bottom, there is a control bar with icons for close, play/pause, next, re-open, and a title bar that reads "WHERE CAN YOU DO BASIC PROJECT..." with a page number "2/2".

# RECAP

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- MS Project allows you to create a new project, use available templates.
  - When setting up a project in MS Project, it is necessary to create a basic project calendar, define the working time of the project, its start.
  - Each work resource can have its own calendar.
  - In the calendar it is possible to set non-working hours, holidays and other exceptions.
-