

Introduction to MS Project

Software solution for your project planning and managing

MS Project



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Project Management



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
-

Learning objectives

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.
-

Key readings

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://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
-

Learning tutorials



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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/>

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.

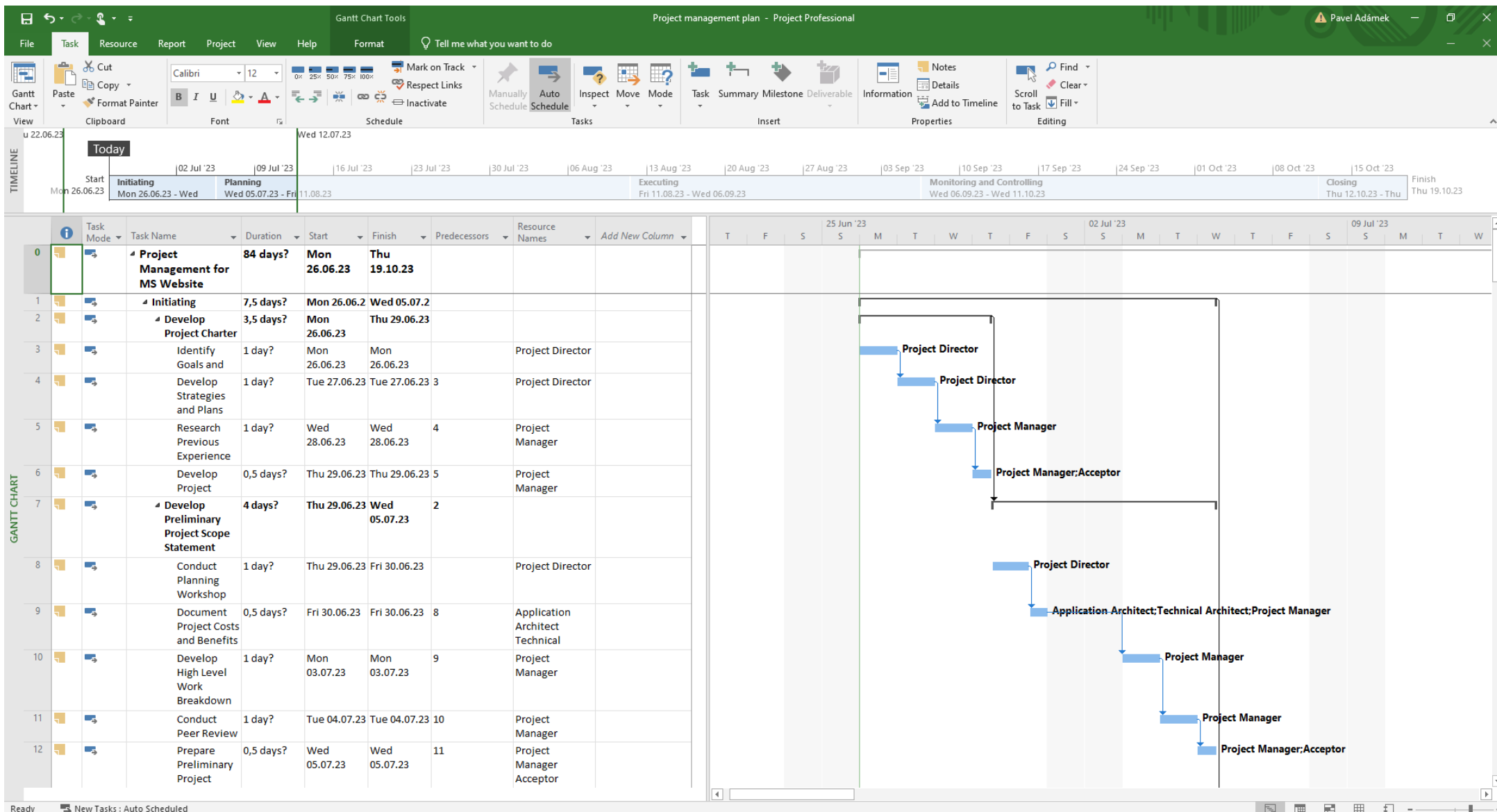
WEAKNESSES

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.

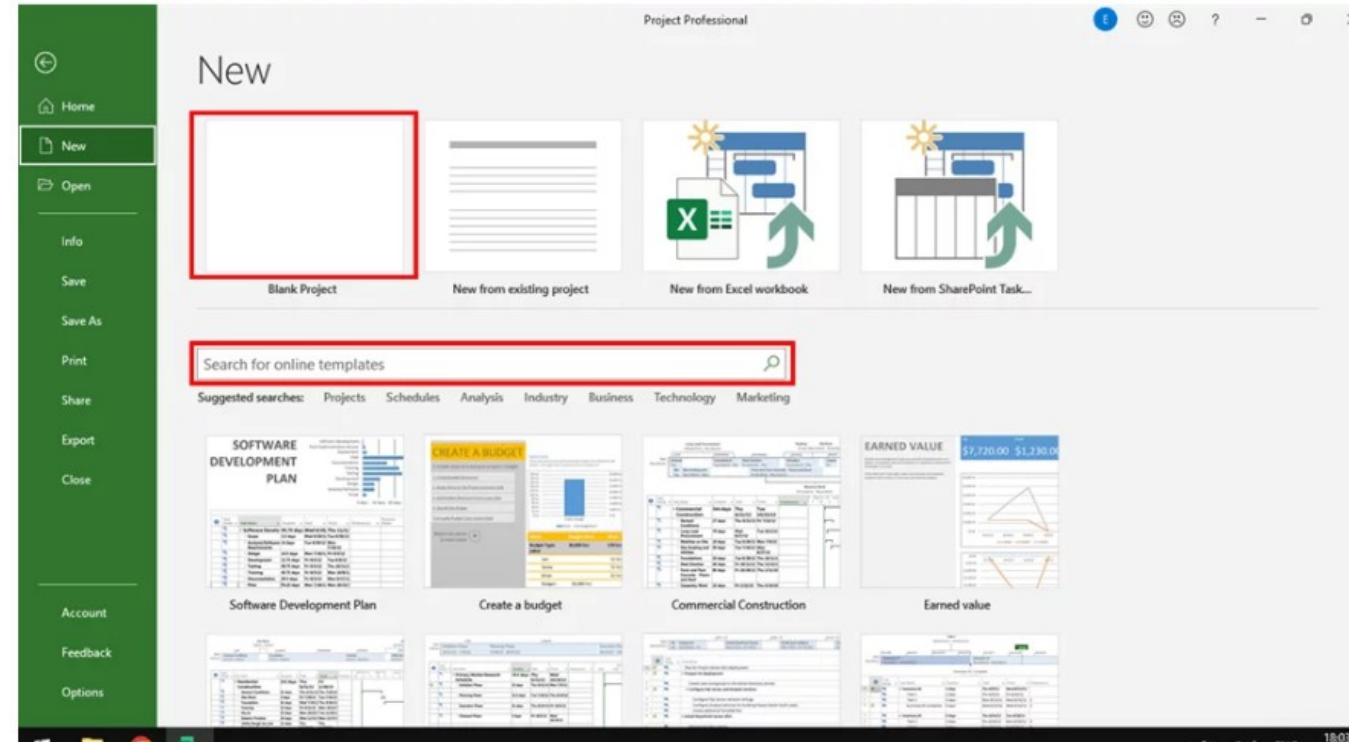
What does a project look like in MS Project?



How to create and manage your project schedule



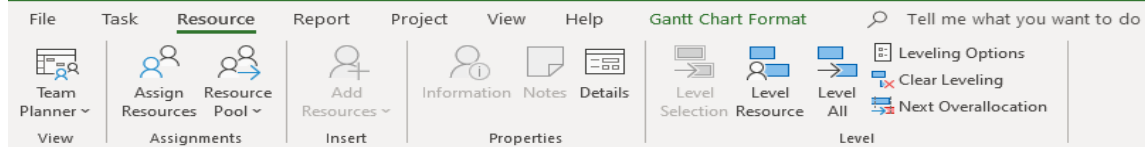
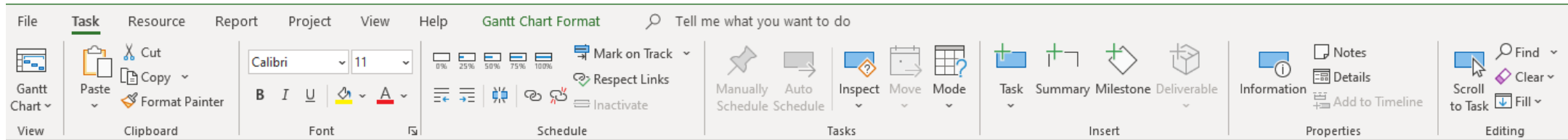
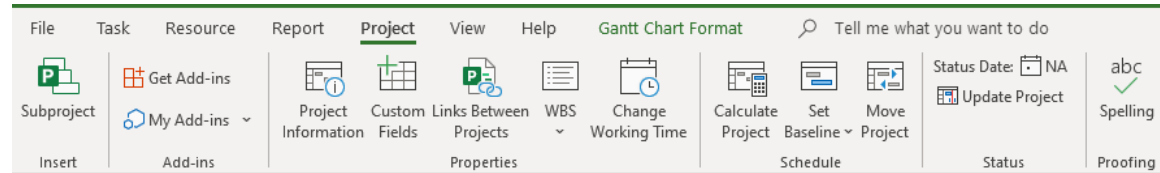
- After you complete the initial thinking about your project's objectives, it's time to put together a schedule.
- When you start a new schedule, you add tasks and organize them efficiently so that the project end date occurs as soon as possible. So, the first step will be to create a new project (let's 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.



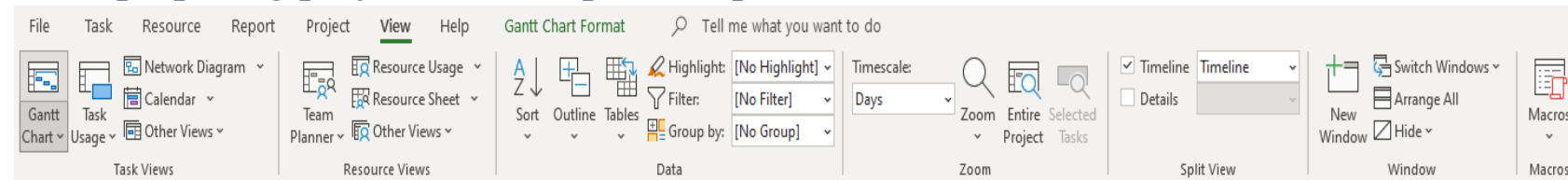
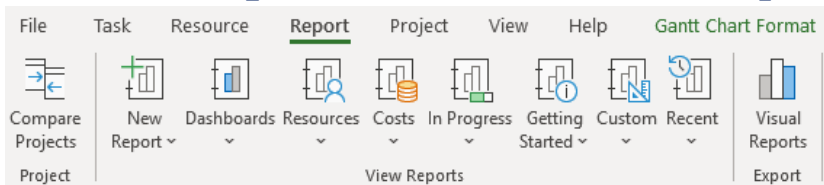
How to create and manage your project schedule



- 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

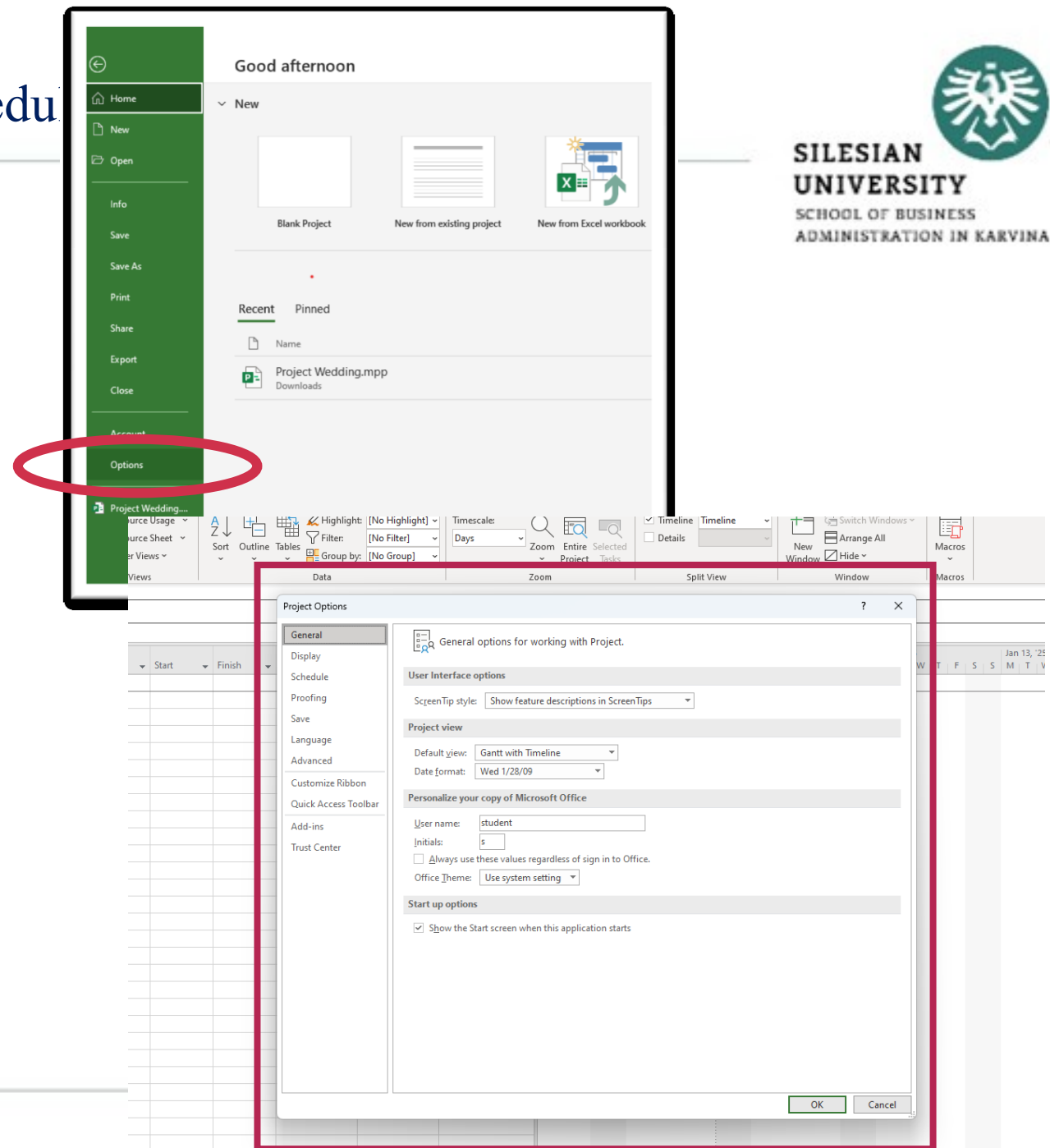


- the **Report** and **View** tabs are helpers when preparing project status reports or printouts.



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.



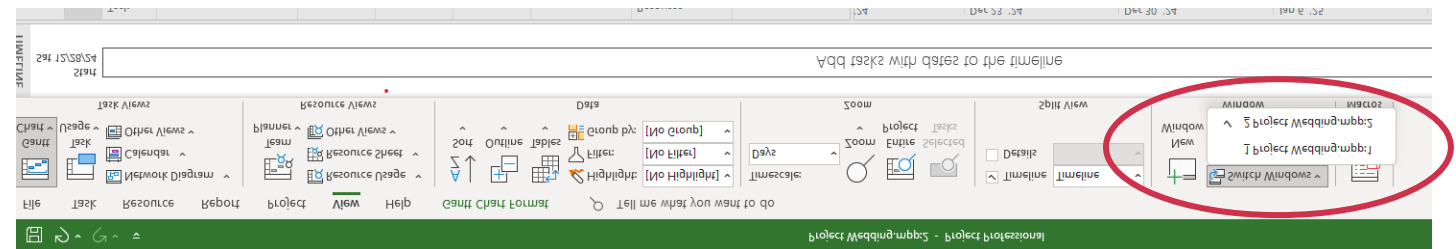
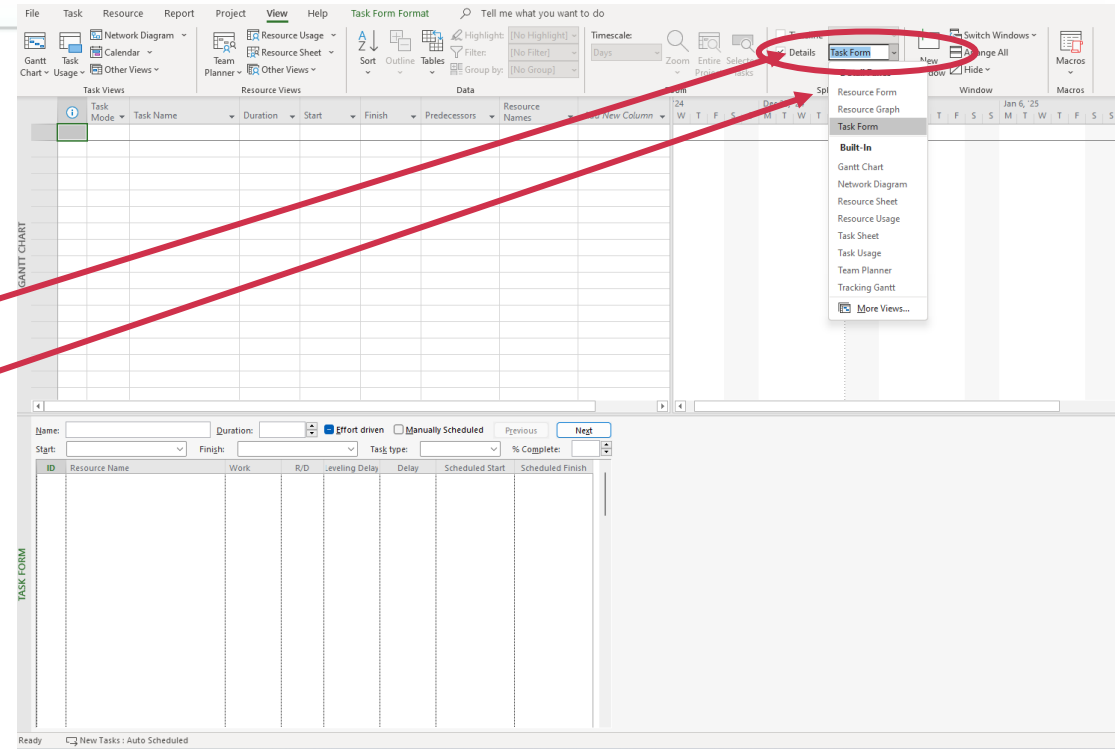
How to create and manage your project schedule



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**.

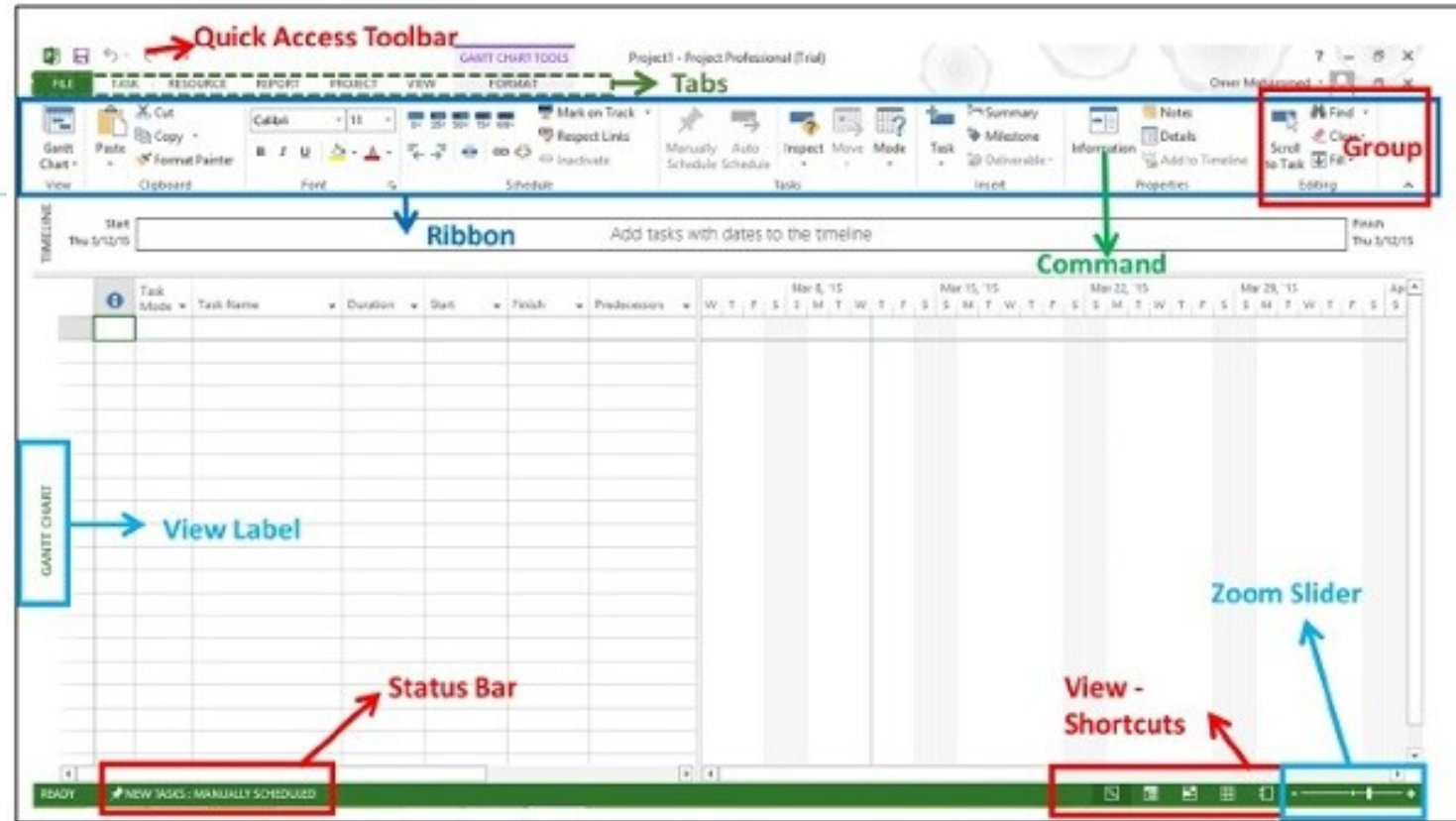
In the application, you can open multiple project files at once, or you can open a single project in multiple windows with different views. To switch between file windows, that is, to select different document windows to work with, use the **Views** tab in the **Window** group.



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 - example

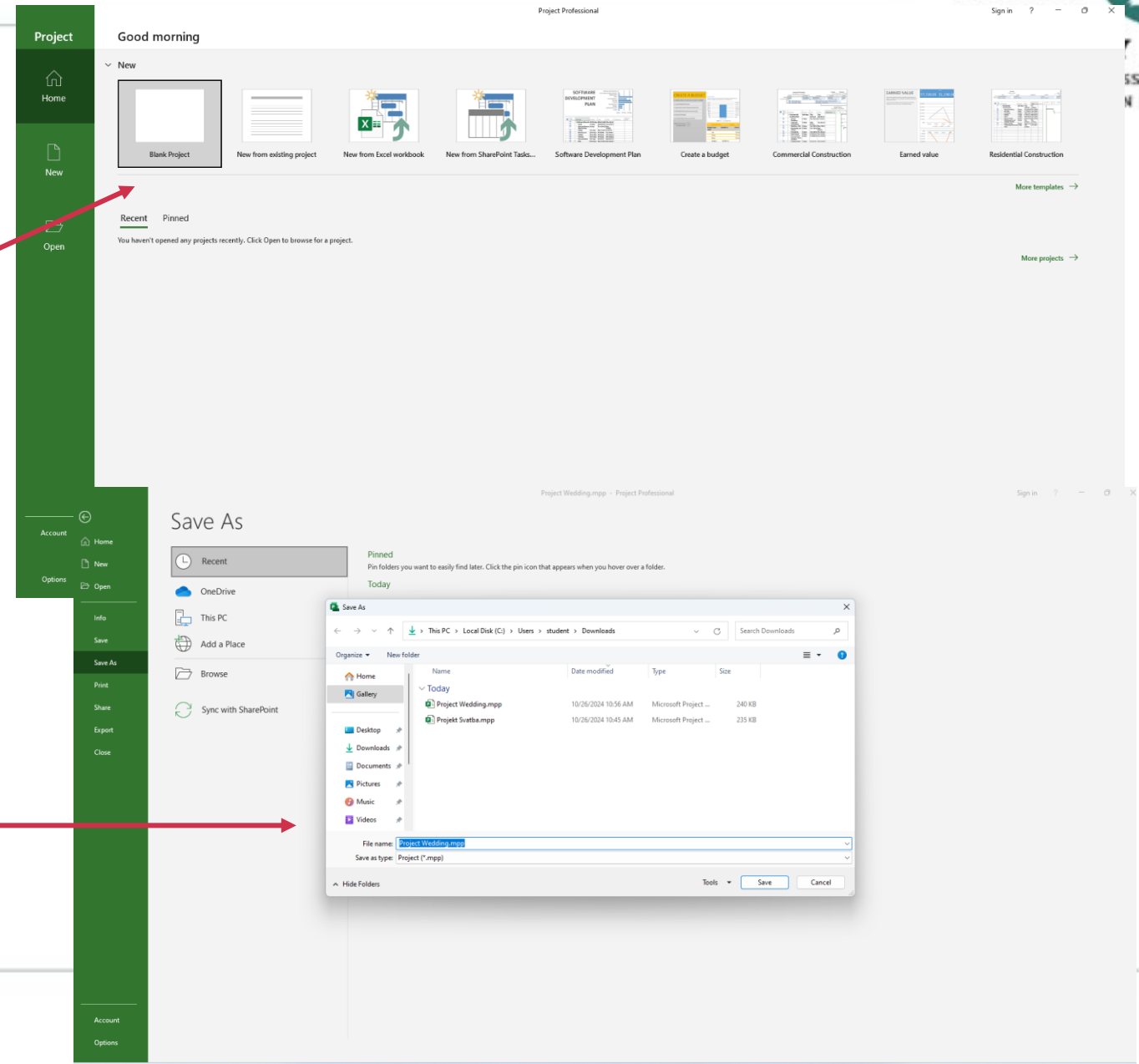


Project Wedding

- Files with tasks saved in Interactive Syllabus and IS – materials for study – lectures

1. Open MS Project – Blank Project

2. File – save as – save under **Project Wedding**
With type **.mpp**



Establishing a project MS Project - example



Important!

MS Project has similar functions to MS Excel – you can **add/delete/copy** rows and columns

1. We need to set up the project's general settings:

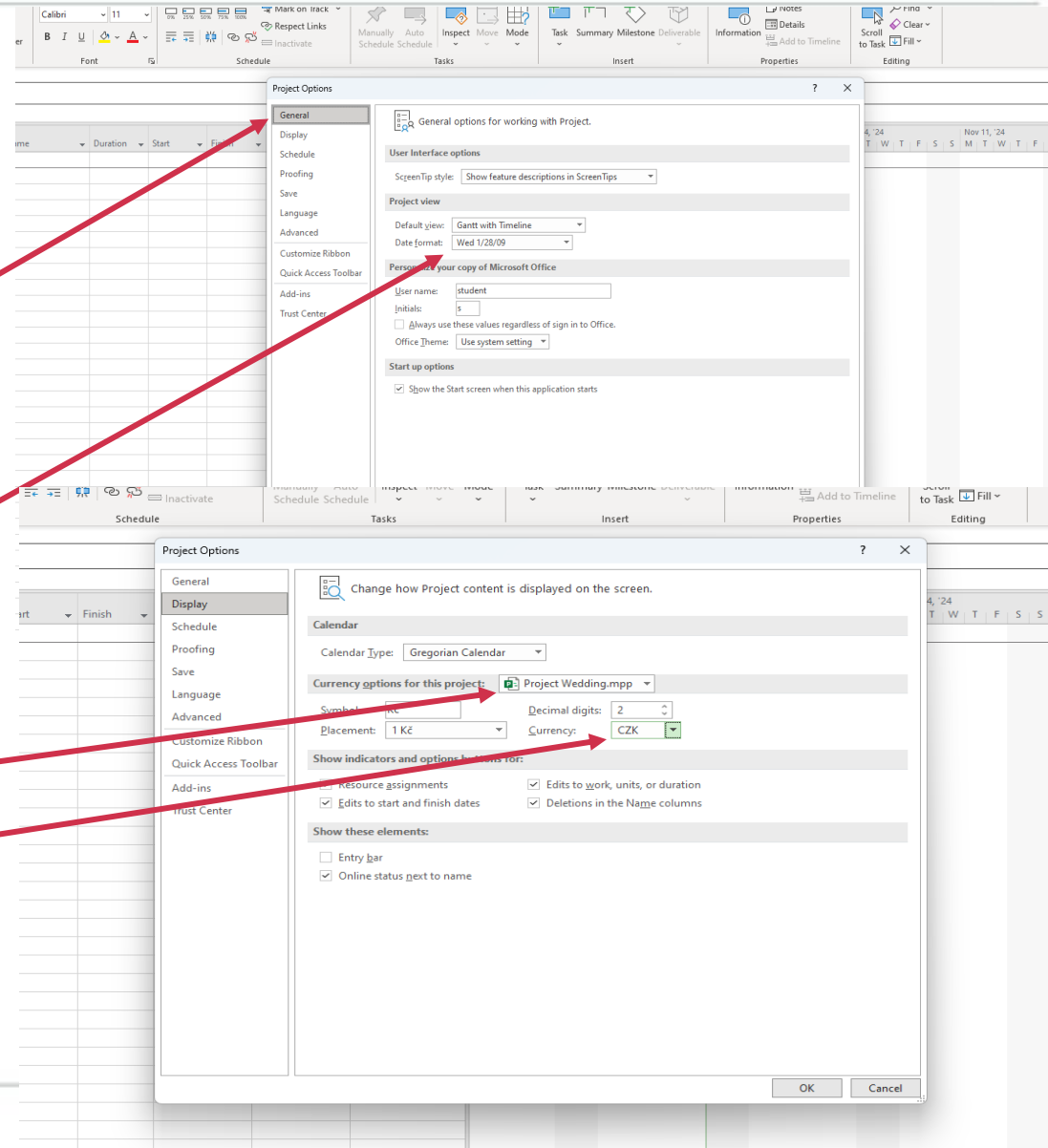
Go to:

File – Options – General – Set up Date Format

2. Set up Display settings:

Go to:

File – Options – Display – Set up currency section for this project and currency



Establishing a project MS Project - example

We need to set up the project's schedule settings

Go to:

File – Options – Schedule

- Calendar options for this project
- Check week “starts on” and “Fiscal year

Starts in”

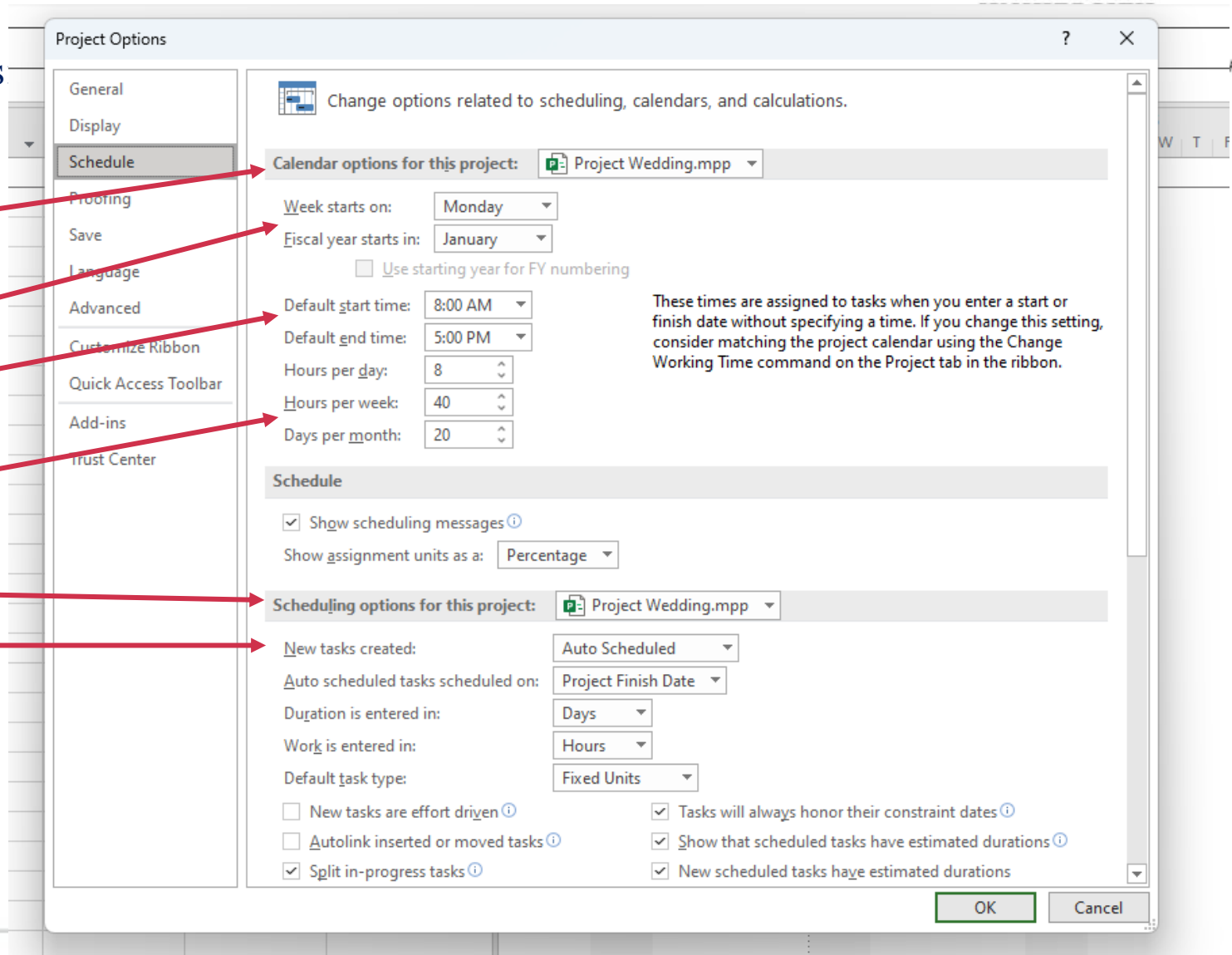
- Set “Default start/end time
- Set “Hours per day/week and “Days per

Month”

- Scheduling options for this project
- New tasks created – MUST BE AUTO

SCHEDULED

If done, OK



The screenshot shows the 'Project Options' dialog box with the 'Schedule' tab selected. The 'Calendar options for this project' section is set to 'Project Wedding.mpp'. The 'Week starts on' is set to 'Monday' and 'Fiscal year starts in' is set to 'January'. The 'Default start time' is '8:00 AM' and 'Default end time' is '5:00 PM'. 'Hours per day' is '8', 'Hours per week' is '40', and 'Days per month' is '20'. The 'Schedule' section has 'Show scheduling messages' checked and 'Show assignment units as a' set to 'Percentage'. The 'Scheduling options for this project' section has 'New tasks created' set to 'Auto Scheduled', 'Auto scheduled tasks scheduled on' set to 'Project Finish Date', 'Duration is entered in' set to 'Days', 'Work is entered in' set to 'Hours', and 'Default task type' set to 'Fixed Units'. There are several checkboxes at the bottom, including 'New tasks are effort driven', 'Autolink inserted or moved tasks', 'Split in-progress tasks', 'Tasks will always honor their constraint dates', 'Show that scheduled tasks have estimated durations', and 'New scheduled tasks have estimated durations'. The 'OK' and 'Cancel' buttons are at the bottom right.

Establishing a project MS Project - example



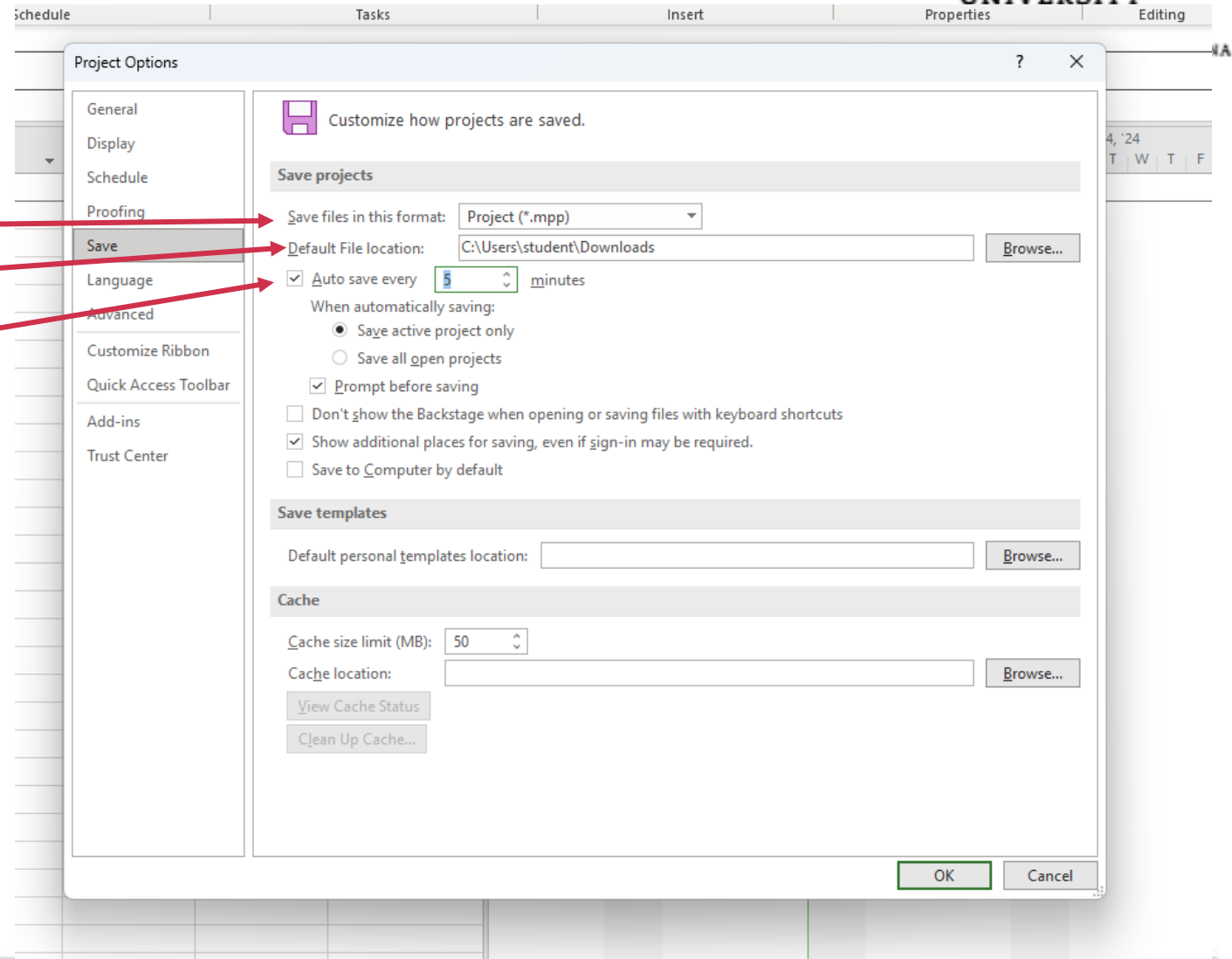
We need to set up the project's options "SAVE":

Go to:

File – Options – Save

- Save files in this format: *.mpp
- Default file location:
- Auto save every: 5mins or as you wish

If done, OK



Establishing a project MS Project - example

We need to set up the project's **Information about project:**

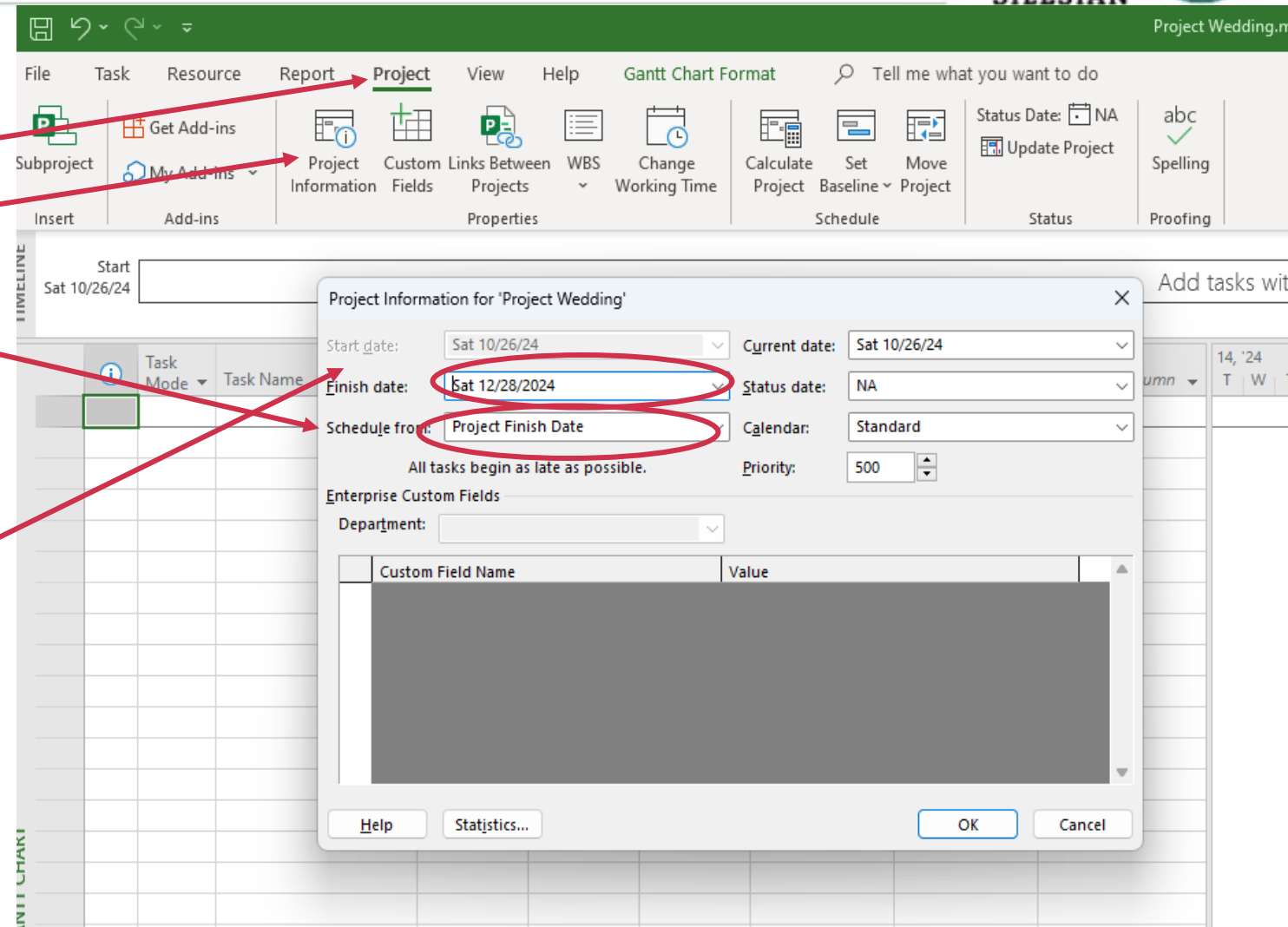
Go to:

Project – Project information

- Project can be scheduled from either:
- Project start date/
- Project finish date

- Set Start date or Finish date according to choosing previous “Schedule from”
- Our project is going to start from “Project finish date”
- Our finish date will be on the 28/12/2024

If done, OK



The screenshot shows the Microsoft Project interface with the 'Project Information' dialog box open for 'Project Wedding'. The dialog box contains the following fields:

- Start date: Sat 10/26/24
- Current date: Sat 10/26/24
- Finish date: Sat 12/28/2024 (circled in red)
- Status date: NA
- Schedule from: Project Finish Date (circled in red)
- Calendar: Standard
- Priority: 500
- Enterprise Custom Fields: Department (empty)
- Custom Field Name and Value table (empty)

Buttons at the bottom of the dialog box include Help, Statistics..., OK, and Cancel. Red arrows from the text on the left point to the 'Project Information' button in the ribbon, the 'Project Finish Date' option in the 'Schedule from' dropdown, and the 'Finish date' field.

Establishing a project MS Project - example



We need to set up the project's **Calendar**:

Go to:

Project – Change Working Time

- We can see window with settings of New Calendar/Exceptions/Work Weeks
- Press Create New Calendar

- Set your new calendar name: Wedding calendar

- Choose “make a copy of Standard calendar”

In “For calendar” will automatically appear your newly created calendar.

If done, OK

The screenshot shows the MS Project interface with the 'Change Working Time' dialog box open. The 'For calendar' dropdown is set to 'Standard (Project Calendar)'. The 'Create New Calendar...' button is highlighted. Below the dialog, the 'Create New Base Calendar' dialog box is also open, showing the 'Name' field set to 'Wedding calendar' and the 'Make a copy of' radio button selected. The 'Standard' calendar is chosen in the dropdown. The 'OK' button is highlighted.

Establishing a project MS Project - example



We need to set up the your own working hours.

Go to:

We are still in Project – Change Working Time

- Check if in “For calendar” is your own calendar Wedding calendar
- Press “Work Weeks”
- Small window will pop up
- In here you can adjust the working hours for each day of the week
- As you can see the working hours are as we set at the beginning in the “Options”.
- We will set the working hours from 9am to 12pm and from 1pm to 3pm from Monday to Friday.
- Highlight the days and then set days to these specific working hours
- Then do the same for the weekend days and set them as nonworking days.

If done, OK

Change Working Time

For calendar: Wedding calendar
Calendar 'Wedding calendar' is a base

Legend:
 Working
 Nonworking

Click on a day to see its working times: October 26, 2024 is nonworking.

October 2024

M	T	W	Th	F	S	S
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Exceptions: Work Weeks

Name	Start	Finish
[Default]	NA	NA

Details for [Default]

Set working time for this work week

Select day(s):
 Use Project default times for these days.
 Set days to nonworking time.
 Set day(s) to these specific working times:

From	To
9:00 AM	12:00 PM
1:00 PM	3:00 PM

Details for [Default]

Select day(s):
 Use Project default times for these days.
 Set days to nonworking time.
 Set day(s) to these specific working times:

From	To

Establishing a project MS Project - example



We need to set up the your own Exceptions:

Go to:

We are still in Project – Change Working Time

- Press “Exceptions”
- In here you can add exceptions to your calendar
- MS project doesn't know our bank holidays or other days we will not work.
- Write a name for your exception and choose start and end date, then press Details.
- Small window will pop up.
- Here we can set for the specific day, if it is working or nonworking. If working we put working times and we can set how often this will occur down in Recurrence pattern and Range of recurrence.
- We will do 5 exceptions:
- 17. November – nonworking days
- 24. December, 25. December, and 26. December – working days from 9am to 12pm
- Wedding day – working day from 8am to 11pm
- You can see the days with exceptions are of different color.

If done, OK

Change Working Time (November 2024)

For calendar: Wedding calendar
Calendar 'Wedding calendar' is a base

Legend:
 Working
 Nonworking
 Edited working hours
 Exception day
 Nondefault work week

Click on a day to see its working times: November 17, 2024 is nonworking.

M	T	W	Th	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Based on: Exception '17. November' on calendar 'Wedding calendar'.

Name	Start	Finish
1 17. November	11/17/2024	11/17/2024

Details for '17. November'

Set working times for these exceptions
 Nonworking
 Working times:

Recurrence pattern
 Daily Every 1 days
 Weekly
 Monthly
 Yearly

Range of recurrence
 Start: Sun 11/17/24
 End after: 1 occurrences
 End by: Sun 11/17/24

Change Working Time (December 2024)

For calendar: Wedding calendar
Calendar 'Wedding calendar' is a base

Legend:
 Working
 Nonworking
 Edited working hours
 Exception day
 Nondefault work week

Click on a day to see its working times: Working times for December 28, 2024: 8:00 AM to 11:00 PM

M	T	W	Th	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Based on: Exception 'Wedding day' on calendar 'Wedding calendar'.

Name	Start	Finish
1 17. November	11/17/2024	11/17/2024
2 24. December	12/24/2024	12/24/2024
3 25. December	12/25/2024	12/25/2024
4 26. December	12/26/2024	12/26/2024
5 Wedding day	12/28/2024	12/28/2024

Details for 'Wedding day'

Set working times for these exceptions
 Nonworking
 Working times:

From	To
1 8:00 AM	11:00 PM

Recurrence pattern
 Daily Every 1 days
 Weekly
 Monthly
 Yearly

Range of recurrence
 Start: Sat 12/28/24
 End after: 1 occurrences
 End by: Sat 12/28/24

Establishing a project MS Project - example



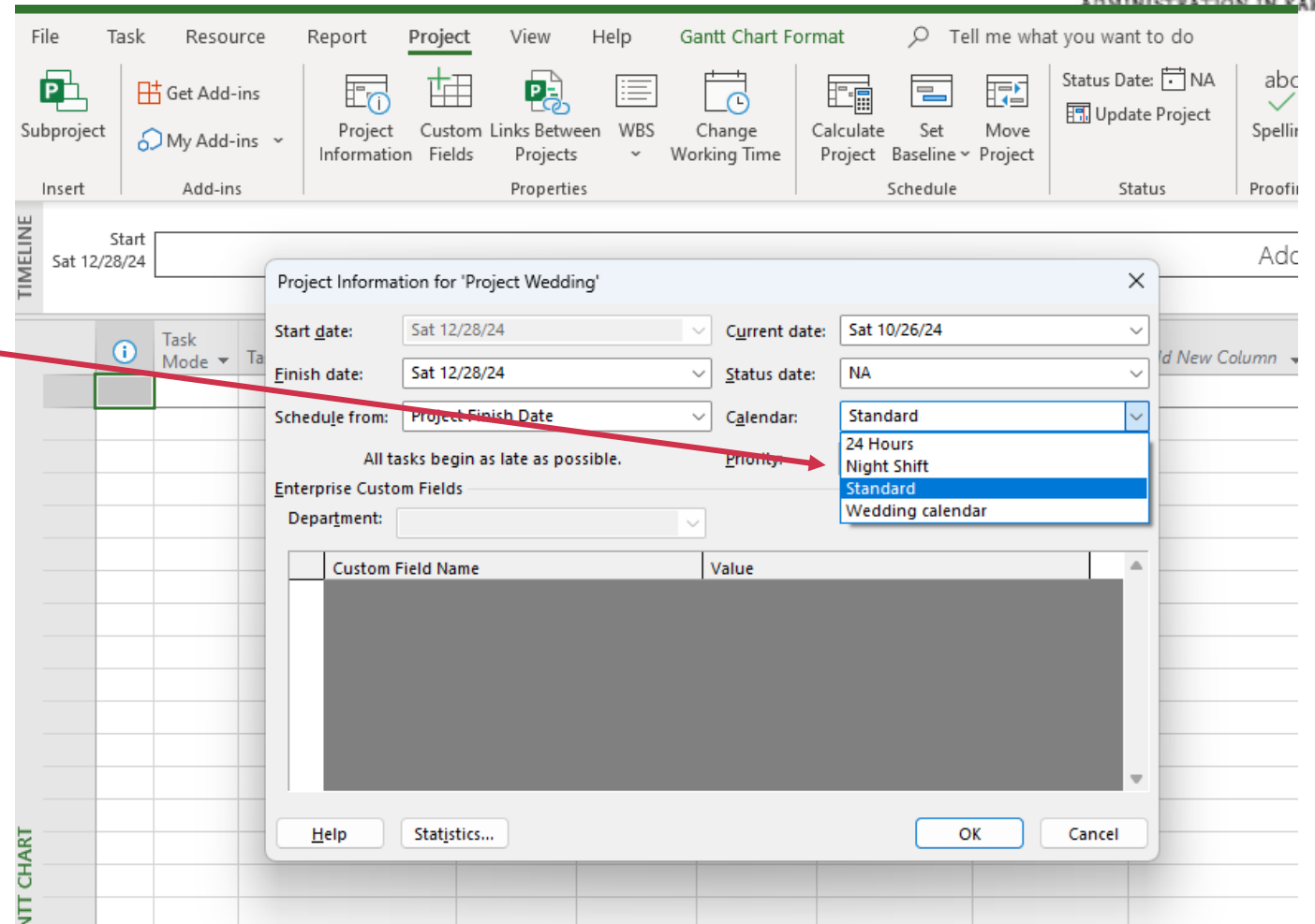
We need to set up your own **Wedding calendar for your project:**

Go to Tab:

Project – Project Information

- In Calendar change your calendar from Standard to Wedding calendar

If done, OK



Establishing a project MS Project - example



- Next step is to make connections between your tasks
- There are 3 ways how you can make connections

1. Highlight two tasks you need to connect and press “chain icon”.

You can see that connection formed.

The screenshot shows the Microsoft Project interface. The ribbon is set to 'Gantt Chart Format'. The 'Tasks' group contains the 'chain icon' (a blue square with a white chain link), which is highlighted by a red arrow. Below the ribbon is a Gantt chart showing a task named 'Add tasks with dates to the timeline' starting on Thu 9/26/24 and ending on Dec 9, '24. Below the Gantt chart is a task list table with the following data:

Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names	Add New Column
1	Planning	1 wk	Thu 9/26/24	Mon 10/7/24			
2	Attire	2 wks	Tue 10/8/24	Tue 10/29/24	1		
3	Guests	3 wks	Tue 10/29/24	Fri 11/29/24			
4	Venue	2 dys	Wed 10/30/24	Mon 11/4/24	2		
5	Catering	2 wks	Wed 12/4/24	Fri 12/27/24			
6	Flowers	1 wk	Thu 12/12/24	Mon 12/23/24			
7	Memories	4 dys	Wed 12/4/24	Thu 12/12/24			
8	Details	5 dys	Wed 12/18/24	Sat 12/28/24			
9	Wedding day	1 dy	Sat 12/28/24	Sat 12/28/24			

Establishing a project MS Project - example



2. Way is to write in the Predecessors the number ID of the previous task

- ID number of each task is on the very left side of the table.

The screenshot displays the Microsoft Project interface. The ribbon includes 'File', 'Task', 'Resource', 'Report', 'Project', 'View', and 'Help'. The 'Task' ribbon is active, showing options like 'Gantt Chart Format', 'Clipboard', 'Font', 'Schedule', 'Tasks', 'Insert', 'Properties', and 'Editing'. A timeline at the top shows dates from Sep 30, '24 to Dec 9, '24. Below the timeline is a Gantt chart with blue bars representing task durations. The task table below the Gantt chart lists tasks with their names, durations, start/finish dates, and predecessor IDs. A red arrow points from the text above to the 'Predecessors' column in the task table, specifically to the value '1' in the 'Attire' row.

Task ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1	Planning	1 wk	Thu 9/26/24	Mon 10/7/24		
2	Attire	2 wks	Tue 10/8/24	Tue 10/29/24	1	
3	Guests	3 wks	Tue 10/29/24	Fri 11/29/24		
4	Venue	2 dys	Wed 10/30/24	Mon 11/4/24	2	
5	Catering	2 wks	Wed 12/4/24	Fri 12/27/24		
6	Flowers	1 wk	Thu 12/12/24	Mon 12/23/24		
7	Memories	4 dys	Wed 12/4/24	Thu 12/12/24		
8	Details	5 dys	Wed 12/18/24	Sat 12/28/24		
9	Wedding day	1 dy	Sat 12/28/24	Sat 12/28/24		
10	Honeymoon	2 wks	Wed 11/20/24	Wed 12/11/24		

Establishing a project MS Project - example



3. Way is to double click on the task you connect.

- New window will appear and on the Predecessors you click on the Task 1.
- choose the task that needs to be connected.
- Then, OK

Task ID	Task Name	Duration	Start	Finish	Predecessors
1	Planning	1 wk	Thu 9/26/24	Mon 10/7/24	
2	Attire	2 wks	Tue 10/8/24	Tue 10/29/24	1
3	Guests	3 wks	Tue 10/29/24	Fri 11/30/24	

The screenshot shows the MS Project interface with a task list and a 'Task Information' dialog box. The 'Predecessors' tab is selected, and a list of tasks is shown for selection. The 'Attire' task is highlighted in the list, and 'Planning' is selected as its predecessor.

ID	Task Name	Type	Lag
1	Planning	Finish-to-Start (FS)	0d

Establishing a project MS Project - example



Now we need to establish Task dependency between the tasks

- You double click on the arrow between two tasks
- Small window will pop up and you choose the type of dependency. There are four and in the next slide I will explain them.
- You can also choose this dependency when you double click on the Task name and choose tab Predecessors and in Type choose the right dependency.

	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names	Add New Column
1		Planning	1 wk	Thu 9/26/24	Mon 10/7/24			
2		Attire	2 wks	Tue 10/8/24	Tue 10/29/24	1		
3		Guests	3 wks	Tue 10/29/24	Fri 11/29/24			
4		Venue	2 dys	Wed 10/30/24	Mon 11/4/24	2		
5		Catering	2 wks	Wed 12/4/24	Fri 12/27/24			
6		Flowers	1 wk	Thu 12/12/24	Mon 12/23/24			
7		Memories	4 dys	Wed 12/4/24	Thu 12/12/24			
8		Details	5 dys	Wed 12/18/24	Sat 12/28/24			
9		Wedding day	1 dy	Sat 12/28/24	Sat 12/28/24			
10		Honeymoon	2 wks	Wed 11/20/24	Wed 12/11/24			

Task Dependency

From: Planning

To: Attire

Type: **Finish-to-Start (FS)**

Lag: 0d

Cancel

Four types of Task dependency between the tasks

- 1. Finish to Start (FS)** – Task 2 will start after Task 1 is finished
 - 2. Finish to Finish (FF)** – Task 1 and Task 2 will finish at the same time, they do not necessarily need to have same start time
 - 3. Start to Start (SS)** – Task 1 and Task 2 start at the same time, they do not need to finish at the same time
 - 4. Start to Finish (SF)** – Task 1 will start after Task 2 is finished
-

Establishing a project MS Project - exam

Now we can set indentation of tasks.

- You can first divide your task into stages or phases by adding rows right above the section you need to divide.
- It will appear as New task, so you rewrite the name
- Then you put in the block all the tasks that belongs under the first section and your press following icon
- You can see that the first task is in bold and the rest tasks have moved little to the right.

The screenshot displays the Microsoft Project interface. The top ribbon shows the 'Gantt Chart Format' tab. The main area is divided into a 'TIMELINE' view at the top and a 'GANTT CHART' view at the bottom. A context menu is open over the task list, with 'Insert Task' highlighted. Red arrows indicate the flow of the process described in the text: one arrow points from the first bullet point to the 'Insert Task' menu option, another points from the second bullet point to the '<New Task>' entry in the task list, and a third points from the third bullet point to the 'Planning' task in the list.

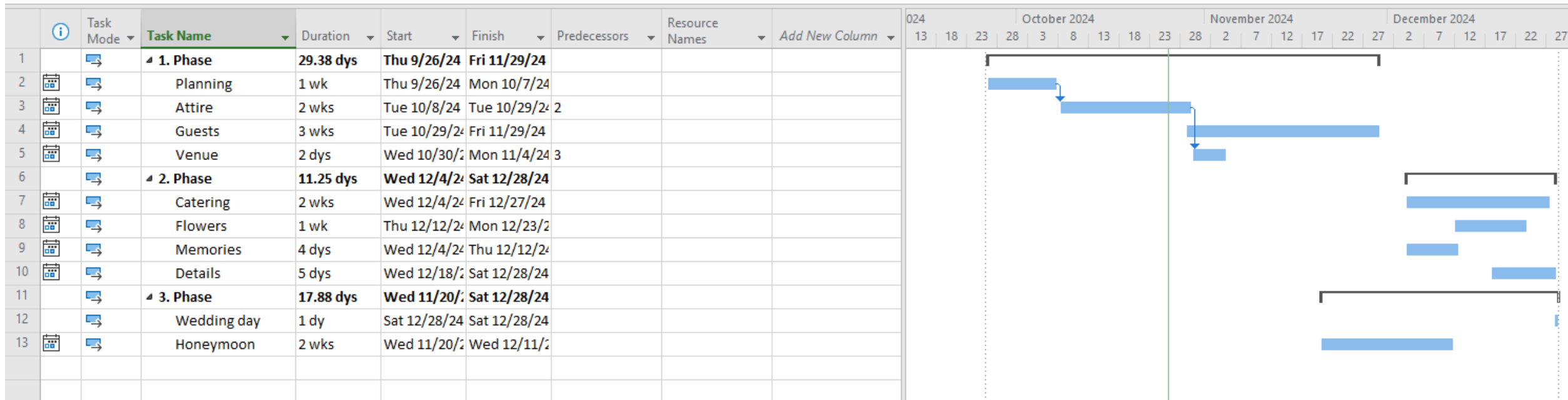
Task Name	Duration	Start	Finish	Predecessors
<New Task>	1 dy?			
Planning	1 wk	Thu 9/26/24	Mon 10/7/24	
Attire	2 wks	Tue 10/8/24	Tue 10/29/24	1
Guests	3 wks	Tue 10/29/24	Fri 11/29/24	
Venue	2 dys			

Task Name	Duration	Start
<New Task>	29.38 dys	Thu 9/26/24
Planning	1 wk	Thu 9/26/24
Attire	2 wks	Tue 10/8/24
Guests	3 wks	Tue 10/29/24
Venue	2 dys	Wed 10/30/24
Catering	2 wks	Wed 12/4/24
Flowers	1 wk	Thu 12/12/24

Establishing a project MS Project - example



This is how it looks like with dividing into sections with indentation.



Establishing a project MS Project - example



You can also create numbering of your tasks.

- Right click on the Task name column and choose Insert column
- Then choose name WBS
- The numbering will be created

		Task Mode	WBS	Task Name	Duration
1			1	1. Phase	29.38
2			1.1	Planning	1 wk
3			1.2	Attire	2 wks
4			1.3	Guests	3 wks
5			1.4	Venue	2 dys
6			2	2. Phase	11.25
7			2.1	Catering	2 wks
8			2.2	Flowers	1 wk
9			2.3	Memories	4 dys
10			2.4	Details	5 dys
11			3	3. Phase	17.88
12			3.1	Wedding day	1 dy
13			3.2	Honeymoon	2 wks

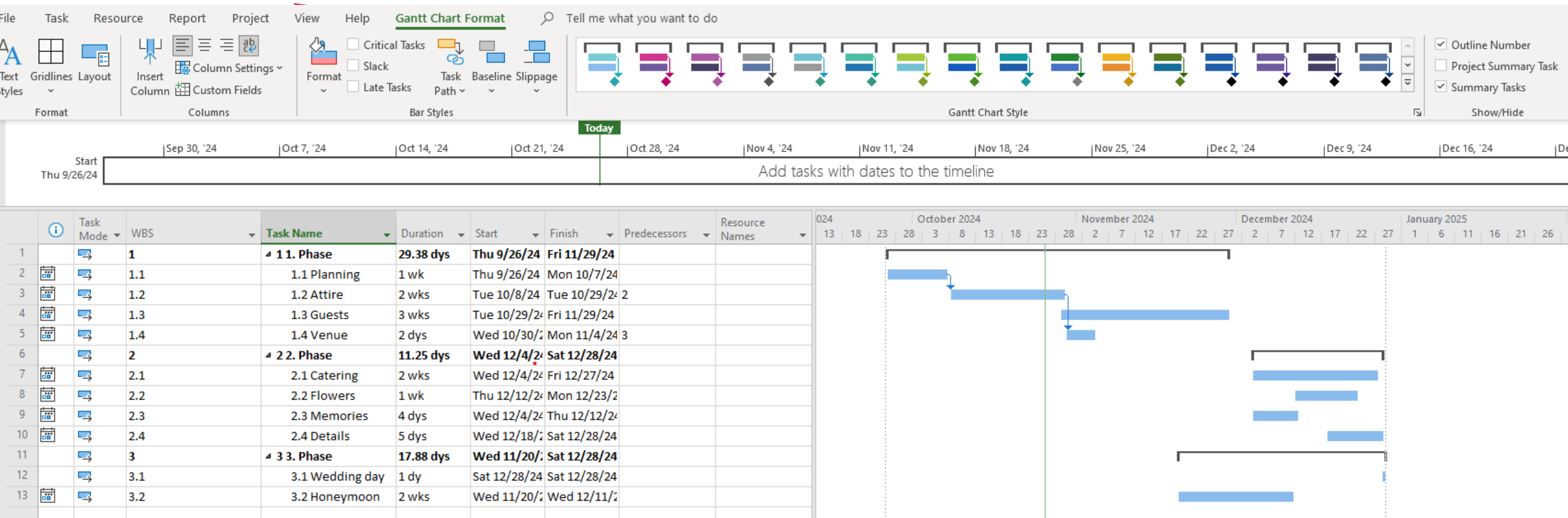
Task ID	Task Name	Duration	Start	Finish	Predecessors
1	1. Phase	29.38 dys	Thu 9/26/24	Fri 11/29/24	
2	Planning	1 wk	Thu 9/26/24	Mon 10/7/24	
3	Attire	2 wks	Tue 10/8/24	Tue 10/29/24	2
4	Guests	3 wks	Tue 10/29/24	Fri 11/29/24	
5	Venue	2 dys	Wed 10/30/24	Mon 11/4/24	3
6	2. Phase	11.25 dys	Wed 12/4/24	Sat 12/28/24	
7	Catering	2 wks	Wed 12/4/24	Fri 12/27/24	
8	Flowers	1 wk	Thu 12/12/24	Mon 12/23/24	
9	Memories	4 dys	Wed 12/4/24	Thu 12/12/24	
10	Details	5 dys	Wed 12/18/24	Sat 12/28/24	
11	3. Phase	17.88 dys	Wed 11/20/24	Sat 12/28/24	
12	Wedding day	1 dy	Sat 12/28/24	Sat 12/28/24	
13	Honeymoon	2 wks	Wed 11/20/24	Wed 12/11/24	

Establishing a project MS Project - example



Another way how to number your tasks is to enter it in front of each task

- Go to Gantt Chart Format – click Outline number
- The numbers will be created in front of the name of the task



Establishing a project MS Project - example



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You can watch following videos on how to set up MS Project:

https://www.youtube.com/watch?v=_uaFyYIwAyU&list=PLzj7TwUeMQ3g_ABHdUU7RoGJJm-YFr4_Y&index=1

There are 18 parts to this topic.

RECAP



- 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.
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