



MEIC GPI

MS Project support document

Versão: 1.0



MS Project Configuration

Next picture presents the default MSP view with the main components:

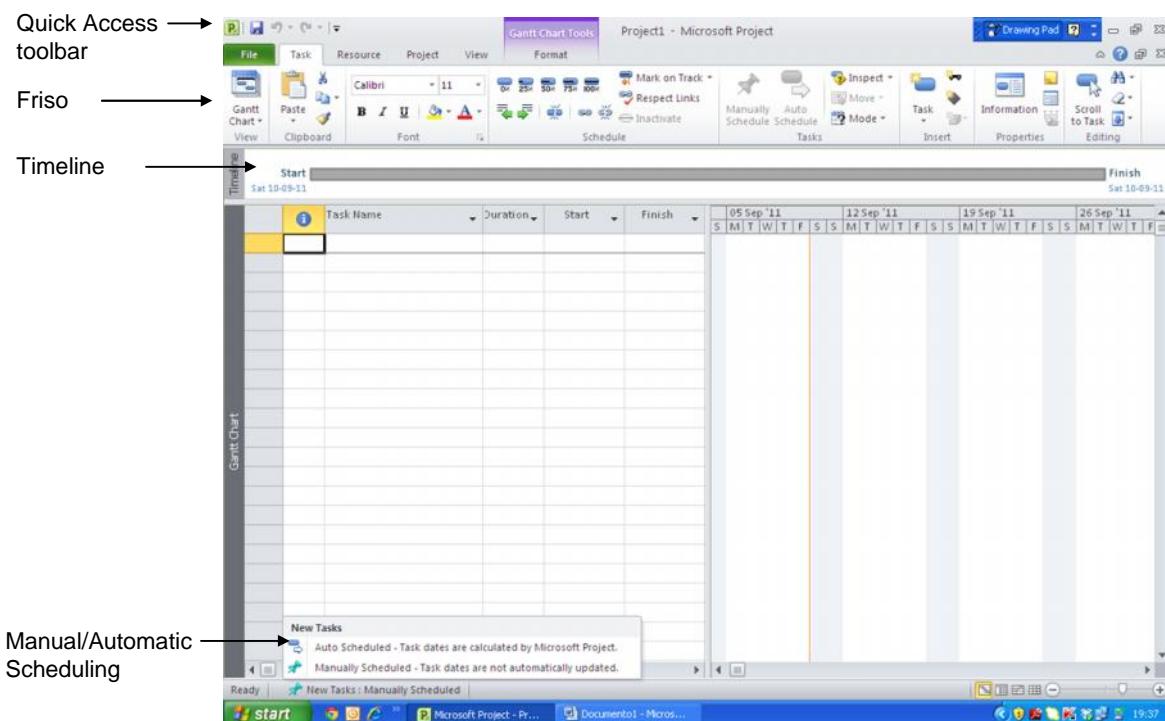
Quick access toolbar – you can change this toolbar

Ribbon (friso) :

- File – file options and help
- Task – project activities management
- Resource – project resources management
- Project –project management and reports
- View – information views and tables options.
- Format

We can change options using: File > Options > Customize Ribbon.

Manual / Automatic Scheduling – use **Auto Scheduled option**



1. Create a project file filename Grouo_X_Ex1.mpp

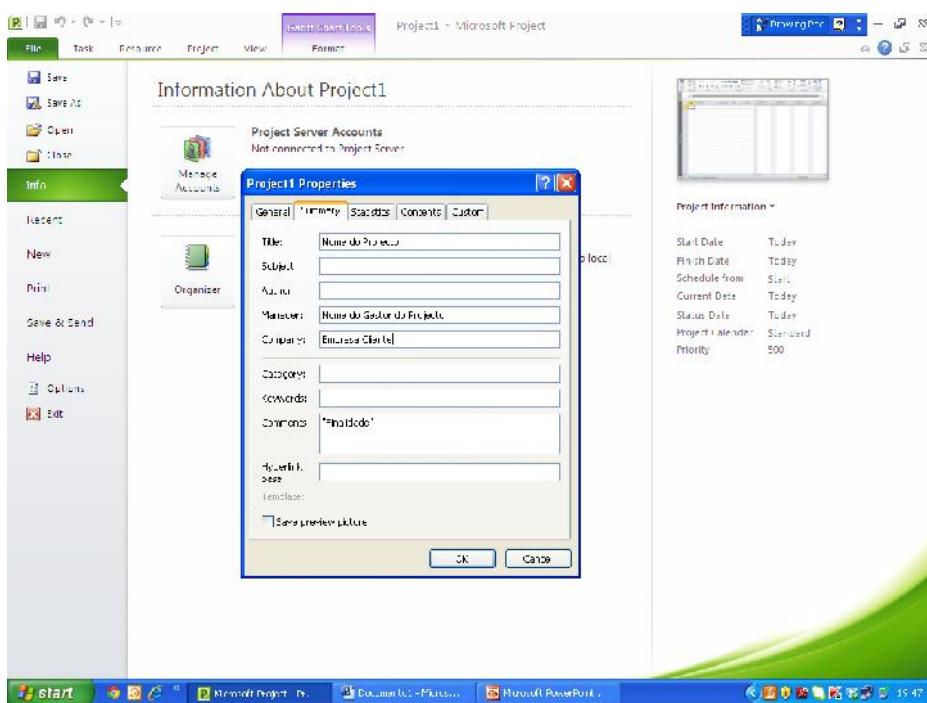
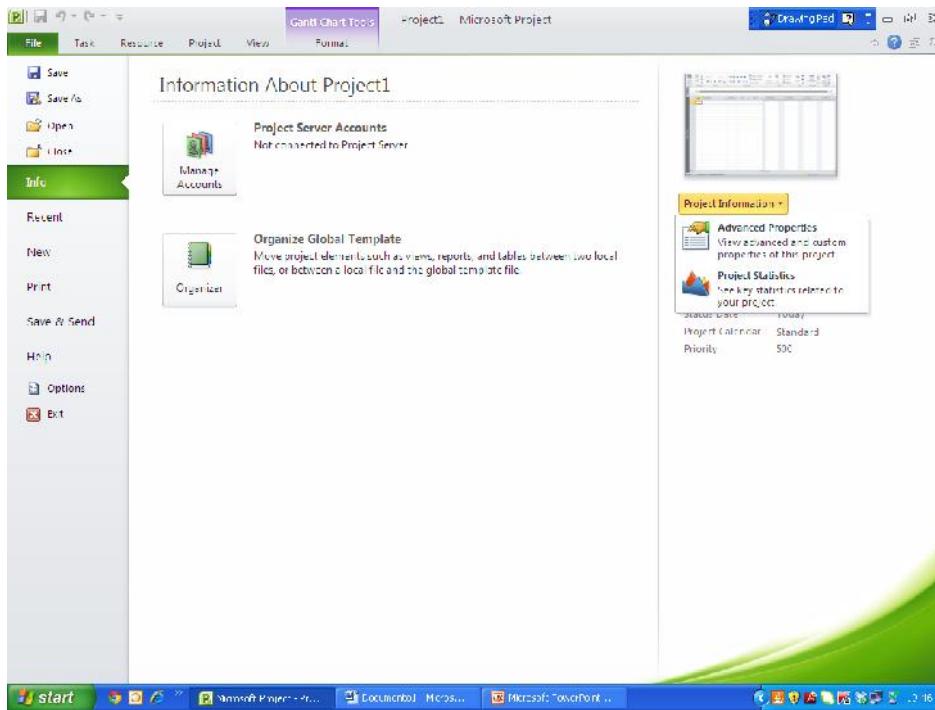
File > Save As { *filename.mpp* }

2. Project information that should be filed:

- Project name
- Customer name
- Project manager name
- Other notes and the project purpose



File > Info > Project Information > Advanced Properties



Title >> { Project name }
Manager >> { Project manager name }
Company >> { Customer name }
Comments >> Project purpose



3. Create the project calendar with public holidays

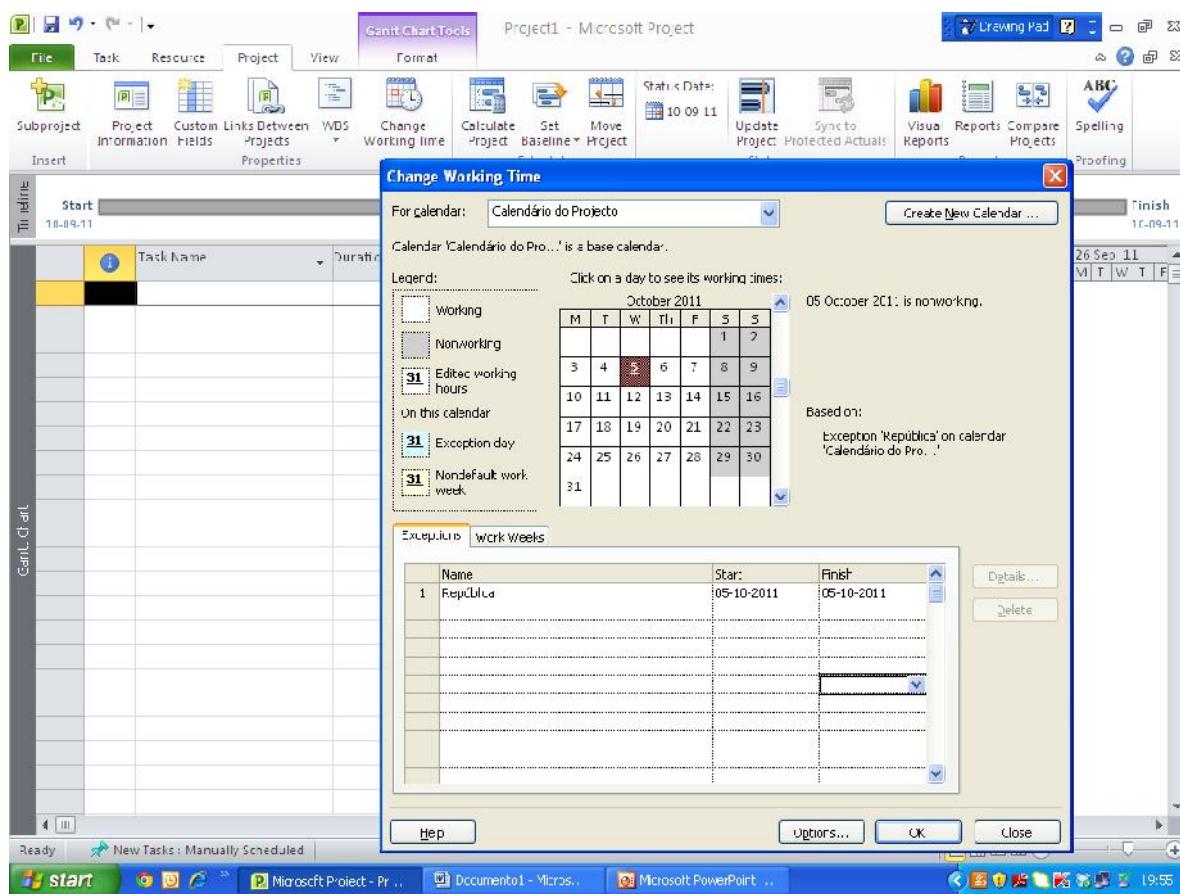
Project > Change Working Time

Create New Calendar

Name >> { Calendar name }

Make a copy of standard

Insert public holidays.

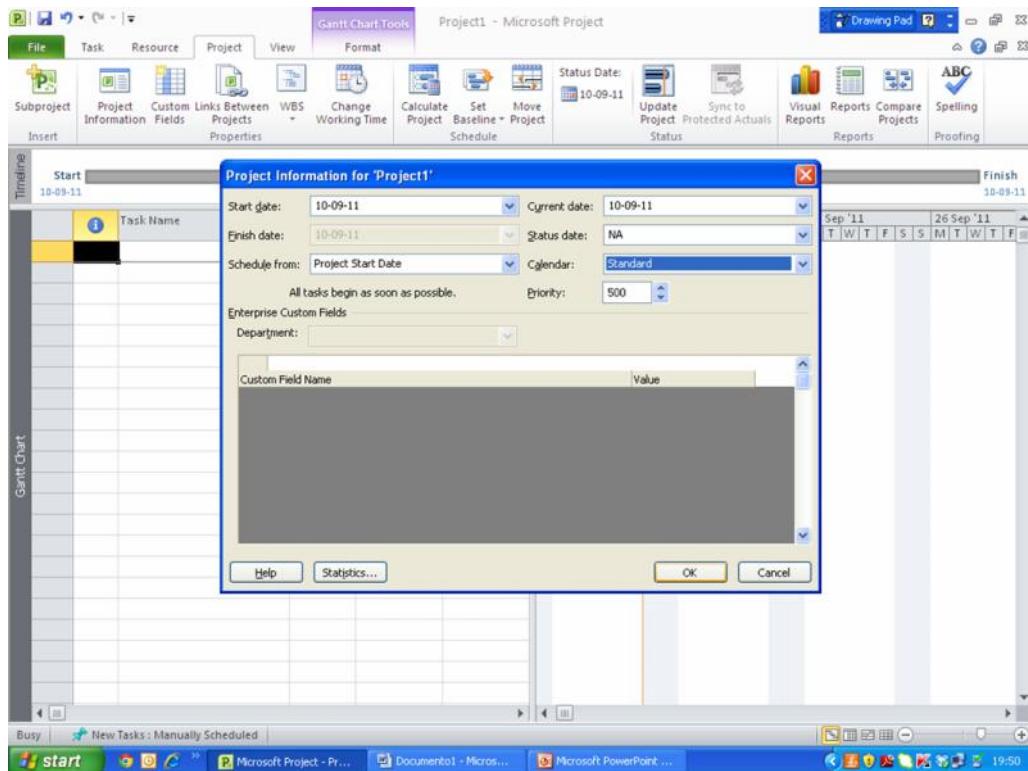




4. Define the project start date

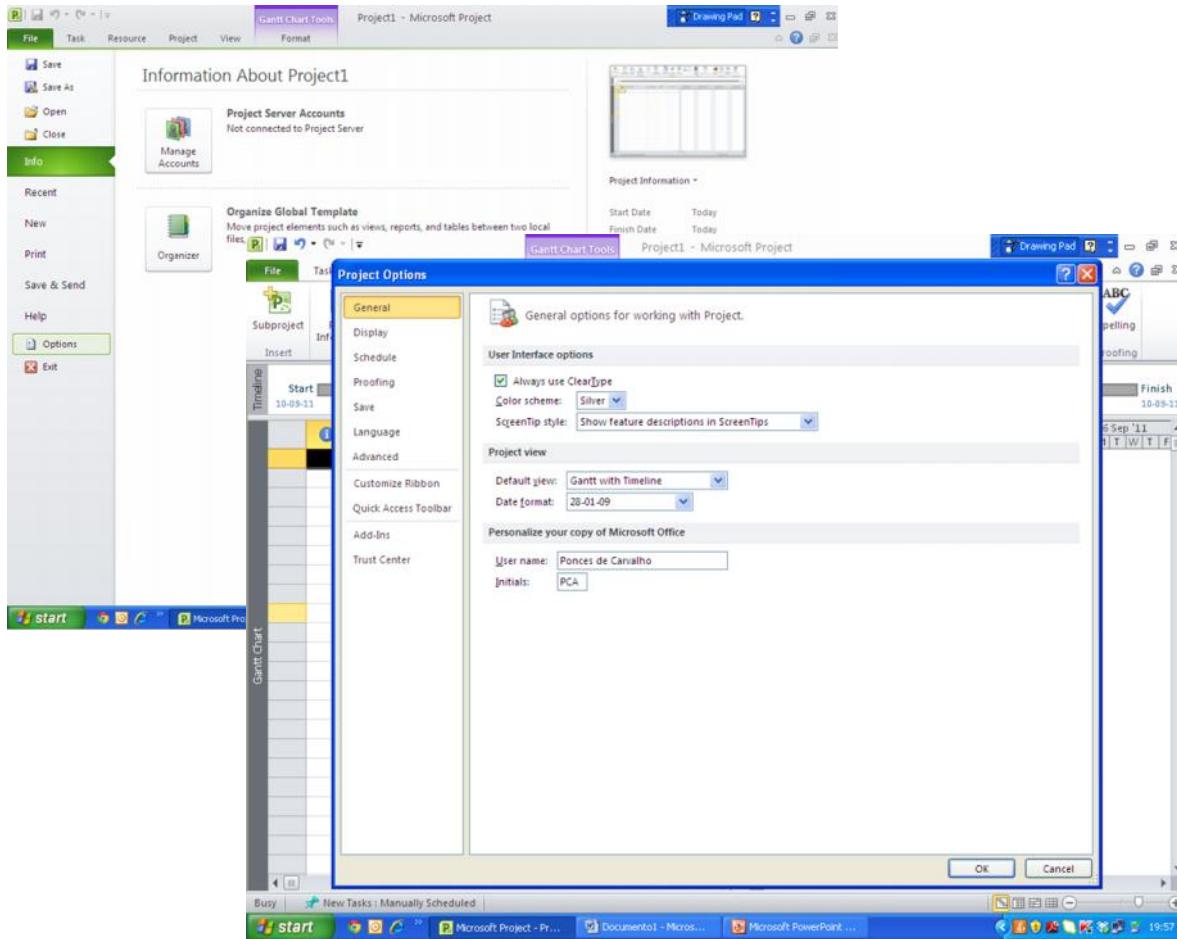
Project > Project Information

Start Date >> {project start date };
Schedule from start date;
Calendar >> {project calendar }





5. MS Project Options.



File > Options

Note: please change only the following options.

General > Date format >> change the format to dd-mm-yy

Display > Currency, Placement >> € 1

Schedule >

New tasks created >> Auto Scheduled

Work is entered in: >> days

Default task type: >> Fixed duration

"New tasks are effort driven" (not active)

Calculation >> On

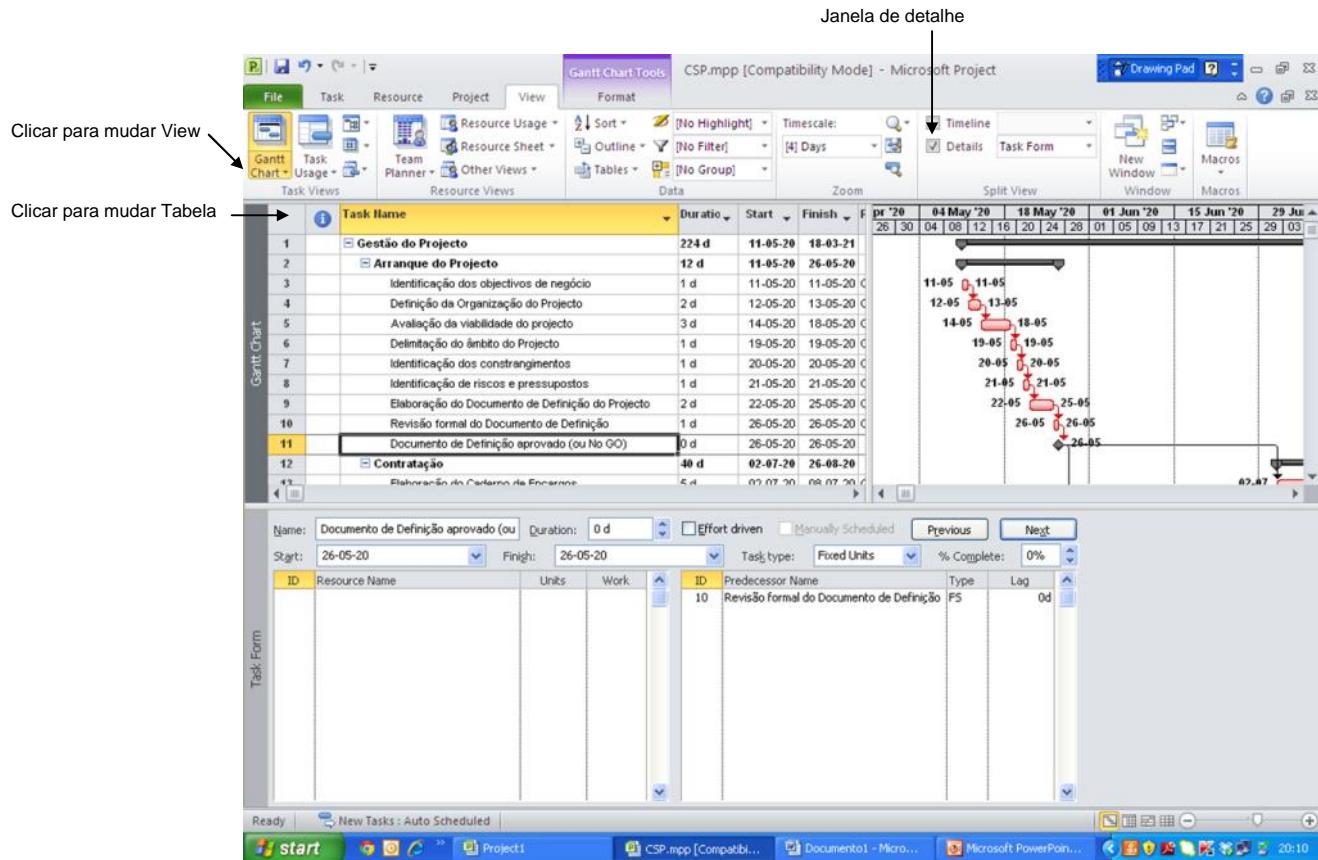
Advanced >

Default standard rate = 0,00 €/d

Recommended: Resource leveling should be manual. :

Resource > Leveling Options >> Manual

6. Insert activities



Insert activities

Task > Gantt Chart > Table: Entry

Create summary activities and milestones.

Desegregate work packages in elementary activities

Indent the activities to show WBS (use arrows bottoms in Task menu)

Insert elementary activities duration

Define precedencies:

Method 1: View>Details (use predecessors window)

Method 2: For sequential activities (with FS relations) use "link tasks" (Menu Task).

Method 3: double click in the activity > predecessors folder

Method 4: use column predecessors in the entry table

Gantt format

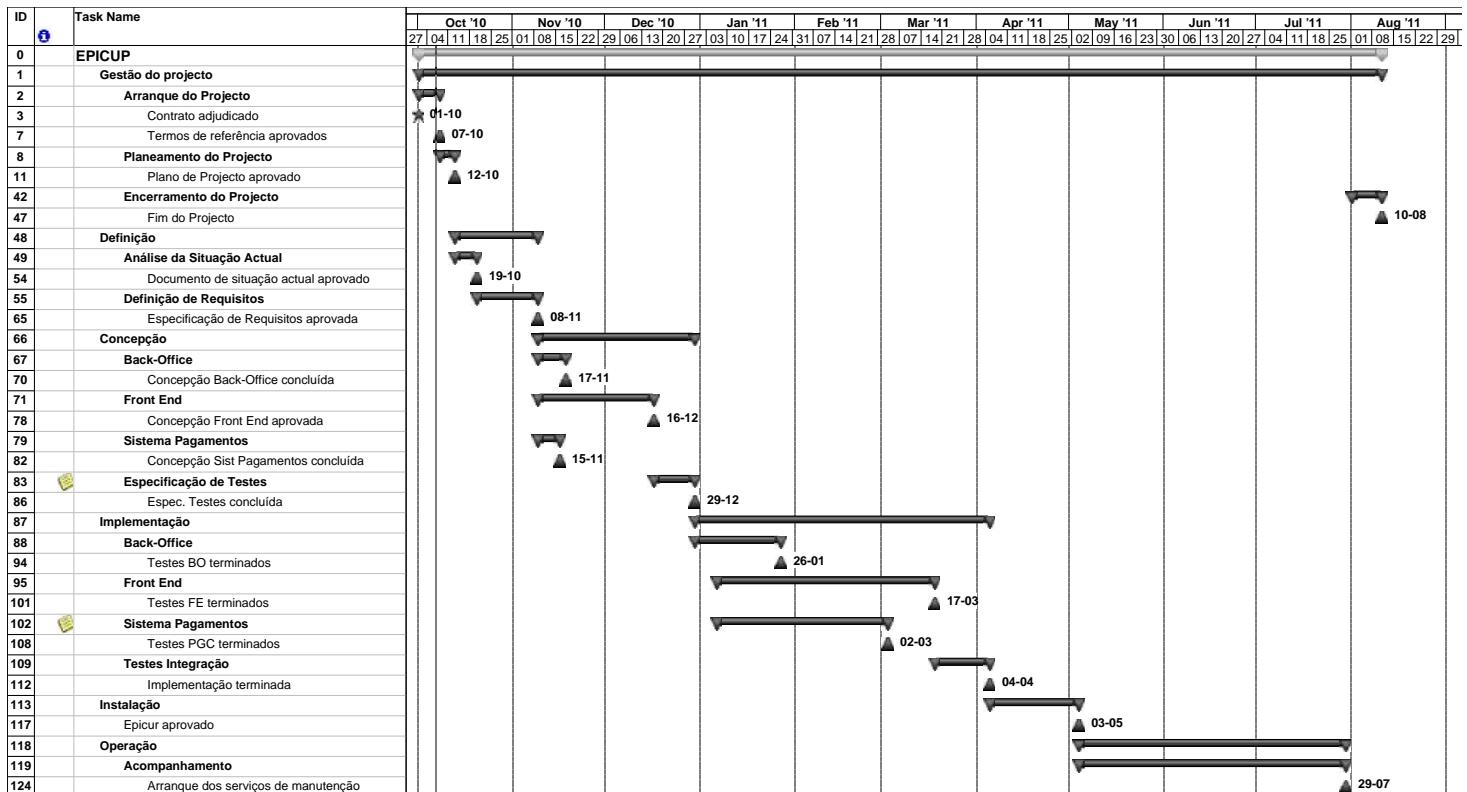
Format >

Format > Bar Styles > Text > Left >> Start; Right >> Finish

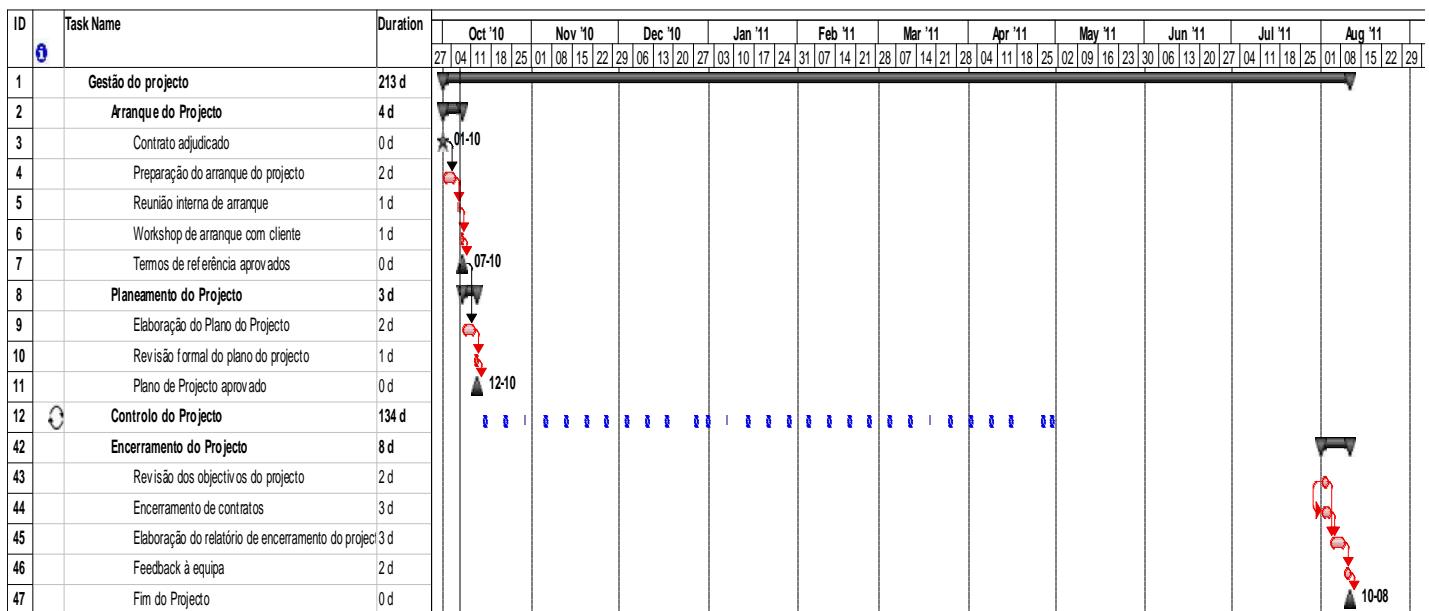
Critical Tasks >> click

Project Summary Task >> click

Gantt with milestones filter example



Detailed gantt example





Create resource pool

Task > View > Resource Sheet.

- Resources with cost by time unit:
 - Resource Name >> {resource id}
 - Type >> work
 - Group >> {functional unit; customer, ...}
 - Max. >> 1 (or 100%)
 - Std Rate >> {dally cost}
 - Ovt. Rate >> 0
 - Accrue At >> prorated
 - Base Calendar >> {project calendar}
- Resources with fixed cost:
The same as previous with the following differences:
 - Cost/Use >> {resource use cost}
 - Accrue At >> End or Start
- Material resources (if the total cost is assumed)
The same as previous with the following differences:
 - Type >> material
 - Material Label >> {input unit} (Kg, Litter, 50Kg, 1 room etc.)

Note: for material resources we can use Std Rate or Cost/Use and any accrual method.
- For non-fixed costs like meals, hotels, travel,...we can use Type >> Cost.
In this case we only create the resource name and the cost will be included during activities resource assignment



Assign resources to activities

The screenshot shows the Microsoft Project application interface. The main window displays a Gantt chart for a project named 'CSF.mpp'. The chart lists various tasks with their start and end dates. A detailed view of task 4, 'Definição da Organização do Projeto', is shown, with its duration set to 2 days. Below the Gantt chart, a 'Task Form' pane is open, showing resource assignments for this task. A 'Resource Sheet' is also visible. An 'Assign Resources' dialog box is overlaid on the screen, specifically for task 4. This dialog box lists available resources and allows the user to assign them to the task. The resources listed include 'Analista Junior', 'Analista C&M', 'Director DSA', 'Gestor Projeto', and 'Auxiliar Júnior'. The 'Assign' button is highlighted.

Method 1:

View > Gantt Chart > Table Entry
Click in Details

Select the resource and input the units (% of resource assignment to the activity)

Method 2:

Resource > Assign Resources

Select the resource and input the units (% of resource assignment to the activity)

Note: we can combine methods 1 and 2

Over allocated resources:

View > Resource Sheet – red colour resources
View > Resource Usage and/or View > Other Views > Resource Graph – to analyse over allocations



Resources Leveling :

Resource > Leveling Options > Resource Levelling >> Automatic ->> Level Now

The screenshot shows the Microsoft Project application interface. The main window displays a Gantt chart for a project named 'CSF.mpp'. The chart shows various tasks with their start and end dates. A 'Resource Leveling' dialog box is open in the foreground, overlaid on the Gantt chart. The dialog box has the following settings:

- Leveling Calculations:** Set to "Manual".
Look for overallocations on a **Day by Day** basis.
Clear leveling values before leveling.
- Level entire project:** Selected.
- Level:** From: 11-03-23 To: 18-03-24
- Resolving overallocations:**
 - Leveling order: Standard
 - Level only within available slack
 - Leveling can adjust individual assignments on a task
 - Leveling can create splits in remaining work
 - Level resources with the proposed booking type
 - Level manually scheduled tasks

At the bottom of the dialog box are buttons for **Help**, **Clear Leveling...**, **Level All**, **OK**, and **Cancel**.