

Create reports with charts activities

Activity 1: Add a chart to a report

The end of the quarter is nearing, and you want to see how recently completed projects stuck to their budgets. Create a report that shows the planned cost vs. the actual cost for projects. You want to see only projects that were completed in the last quarter. Add a combination column chart using custom colors.

Answer 1

1. Select **Reports** from the **Main Menu**.
2. Click the **New Report** menu and select **Project**.
3. In the **Columns (View)** tab, click **Add Column**.
4. Select Project > Planned Cost and summarize this column by **Sum**.
5. Click **Add Column** again.
6. Select Project > Actual Cost and summarize this column by **Sum**.

New Project Report

Report Settings ▾

Columns (View) Groupings Filters Chart

Show in this column:

Project >> Actual Cost

Project

Actual Completion Date

Actual Cost

Actual Expense Cost

Actual Labor Cost

Actual Risk Cost

Default Baseline

Actual Completion Date

Actual Cost

Actual Expense Cost

Actual Labor Cost

Actual Risk Cost

Rejection Issue

Actual Completion Date

Actual Cost

Column Settings

Advanced Options

Switch to Text Mode

☐ Sort by this column

Summarize this column by:

Sum

Done

Column Preview

Apply an Existing View ▾

+ Add Column

NAME	OWNER	DESC	START ON	DUE ON	% COMPLETE	PLANNED COST	ACTUAL COST
CRM Integration - Tampa Office	John Smith	Get the Tampa team up and running with the new CRM tool.	4/15/11	9/5/20	84%	\$1,235	

Save + Close

Apply

Cancel

7. In the **Groupings** tab, set the report to group by Project > Name.

New Project Report

Report Settings ▾

Columns (View) **Groupings** Filters Chart

Group your Report:

Switch to Matrix Grouping | Switch to Text Mode

First by:

Project » Name

+ Add another Grouping

☐ Collapse this grouping by default ?

Grouping Preview

Apply an Existing Grouping ▾

+ Add Grouping

NAME	OWNER	DESC	START ON	DUE ON	% COMPLETE	PLANNED COST	ACTUAL COST
Project» Name							
CRM Integration - Tampa Office	John Smith	Get the Tampa team up and running with the new CRM tool.	4/15/11	9/5/20	84%	\$1,235	

Save + Close

Apply

Cancel

8. In the **Filters** tab, add two filter rules:

- Project > Status Equates With > Complete
- Project > Actual Completion Date > Last Quarter

New Project Report

[Report Settings](#) ▾

Columns (View) Groupings **Filters** Chart


Set Filter Rules for your Report

[Switch to Text Mode](#) | [Apply an Existing Filter](#) ▾

Only show me Projects in which the...

Project >> Status Equates With

Equal ▾


Complete  ▾


×

AND ▾

Project >> Actual Completion Date

Last Quarter ▾

\$\$TODAYb-1q 

\$\$TODAYe-1q 

×

[+ Add another Filter Rule](#)

[Save + Close](#)

[Apply](#)

[Cancel](#)

9. In the **Chart** tab, choose **Column** for the chart type.
10. For the Left (Y) Axis, choose Project > Planned Cost.
11. For the Bottom (X) Axis, choose Project > Name.
12. Click the **Combination Chart** button and select Project > Actual Cost in the **Value** field.
13. Click the arrow next to the color box to change the Actual Cost color. Select one of the colors that appears or click the box in the lower-right corner to bring up the color palette.
14. Click on **Save + Close**. When prompted for a report name, call it “Planned vs Actual Cost by Project Completed Last Quarter.”

Report Settings ▾

Chart



Cancel

