# Creating a New Dashboard Report:

The Dashboard Reports provided with MS Project 2013 are suggestions of the kinds of reports that you might need when reporting on your project. The Dashboard Reports customization feature allow you to create new reports and customize existing reports. Using this feature will provide more flexiability to create the solution to your reporting needs.

When creating a new report you must define the kind of report you would like to create. It is best to design what the charts should look like and what data should be included before starting this process. Changes can easily be made to reports created so you should not be too concerned about getting it right the first time.

In this example we will build a new Dashboard report to compare Baseline Work to Actual Work for resources in a chart. We will also see the progress of our top level (the highest level of the WBS Outline level 1) summary tasks. In addition we will add a title for the report and a picture which will represent a company logo. When the new Dashboard Report is completed it will be copied into the Organizer to be used in other projects.

To start a new Dashboard report:

* Click on Report, New Report.

Options are available to select a template to get you started. You may select a blank template, a chart, a table or a comparision type report. Any of these elements may be added to the report later to enable you to have more than one type of element type section included in a report.

* Select a template type

(insert New dashboard report box screen shot)

New Dashboard report name box

The choosen template will open with the report name centered across the top of the report. In the example below a chart style template had been selected. The default is displaying work comparison at the summary task or top level task summary.

(Insert Opened Dashboard Template screen shot)

Display of chart template for Dashboard Reports

The data being displayed is Task data, work. To change the data displayed on the chart from Task data to Resource Data, work:

* Click on the chart
* Iin the Chart Tools ribbon bar click on Design, click on Chart Data
* Resources at the top of the Field List

The Field list will allow for changes to the report which include field selection, filters, groups, outline level and sorting. In the example below the data has changed to Resource work comparison.

(Insert Chart data screen shot)

The Field List displayed to customize a Dashboard Report

To change the chart type:

* Click inside of the chart
* In the Report Design ribbon section click on Chart
* Select and alternate chart type

The Chart, Design ribbon also contains tools for adding other chart elements, quick layout, changing chart colors and changing style designs. On the Report, Design ribbon you will find tools for Themes, color palates, inserting images and margin settings. In the example below the chart type has been changed from column to bar and a chart style was applied.

(insert screen shot Bar Chart)

Dashboard Report displaying bar chart format

To add a table to the Dashboard Report scroll up and click underneath the existing chart.

* Click on Report Tools, Design, Table

The new table will be added with 4 columns: Name, Start, Finish, %Complete. It will also show as one line which is the information contained in the Project Summary task.

To expand the information to Outline level 1 data:

* Click in the table
* The Field List will appear at the right
* Scroll down to Outline level and select Outline level 1.

(insert screen shot Default table)

Default table format expaneded to Outline level 1

To add a column to the table:

If the Table data pane on the right side of the view is not available:

* Click inside the table
* Click on Table Tools, Design, Table data

Scroll through the fields that can be added to the table on the right. Open sections of fields to find the field you need. To add the Work field to the table, open the Work section and select Work under the Work section.

(insert screen shot Field list with work selected)

Field list with work selected

To reorder the fields in the table:

Scroll down in the Field List to just above the Filter option. Select Work (the last field added) and drag it up under the Name field.

(insert Fields reordered screen shot)

Field Work reordered to display next to the Name field.

To add a logo to the report:

TIP: To change the formatting of an words, add shapes, rotate object, resize or apply shape styles: Select the element to change, Click on the Drawing Tools, Format ribbon and formatting tools will be available.

Click on Report, Design ribbon, Images. Find the image you would like to insert, resize and drag to desired location.

When the customized Dashboard is created it is entered in to the global values for the project you created it in. The report may be copied using the Organizer into your local Global.mpt and then it will become available to other projects you would view on your computer.

To copy the customized Dashboard Report into the Organizer:

Click on Report Tools, Design ribbon, Manage, Organizer.

(insert screen shot Manage button)

Report, Design ribbon bar Manage button

In the Organizer dialog box below you will notice that the Dashboard Reports file is located on the right side of the box and the Global.mpt values are on the left side of the box.

To copy the customized report “Resource Work Comparison Report” from the Dashboard Reports file to the Global.mpt file:

* Click on the report name on the right
* Click Copy in the center of the box
* Click Close when finished

(insert screen shot Organizer box)

Objects are copied into the Global.mpt using the Organizer dialog box.

TIP: You can also use the Organizer to delete reports or rename reports.