Managing Projects with MS Project 2010

Session: 13

Reports

Objectives

- Describe standard reports
- Describe custom reports
- Explain modifications to standard and custom reports
- Describe crosstab reports
- Explain how to print a view
- Describe visual reports
- Explain how to apply graphics to reports
- Describe formatting of reports

Introduction

- Reports help in communicating project information details such as schedule, resource assignments, costs, and so forth.

- MS Project 2010 facilitates project managers with built-in and customizable reports to include the data relevant to their projects.

- It also includes visual reports that offer graphic representation of the project progress by applying certain formatting settings to reports.

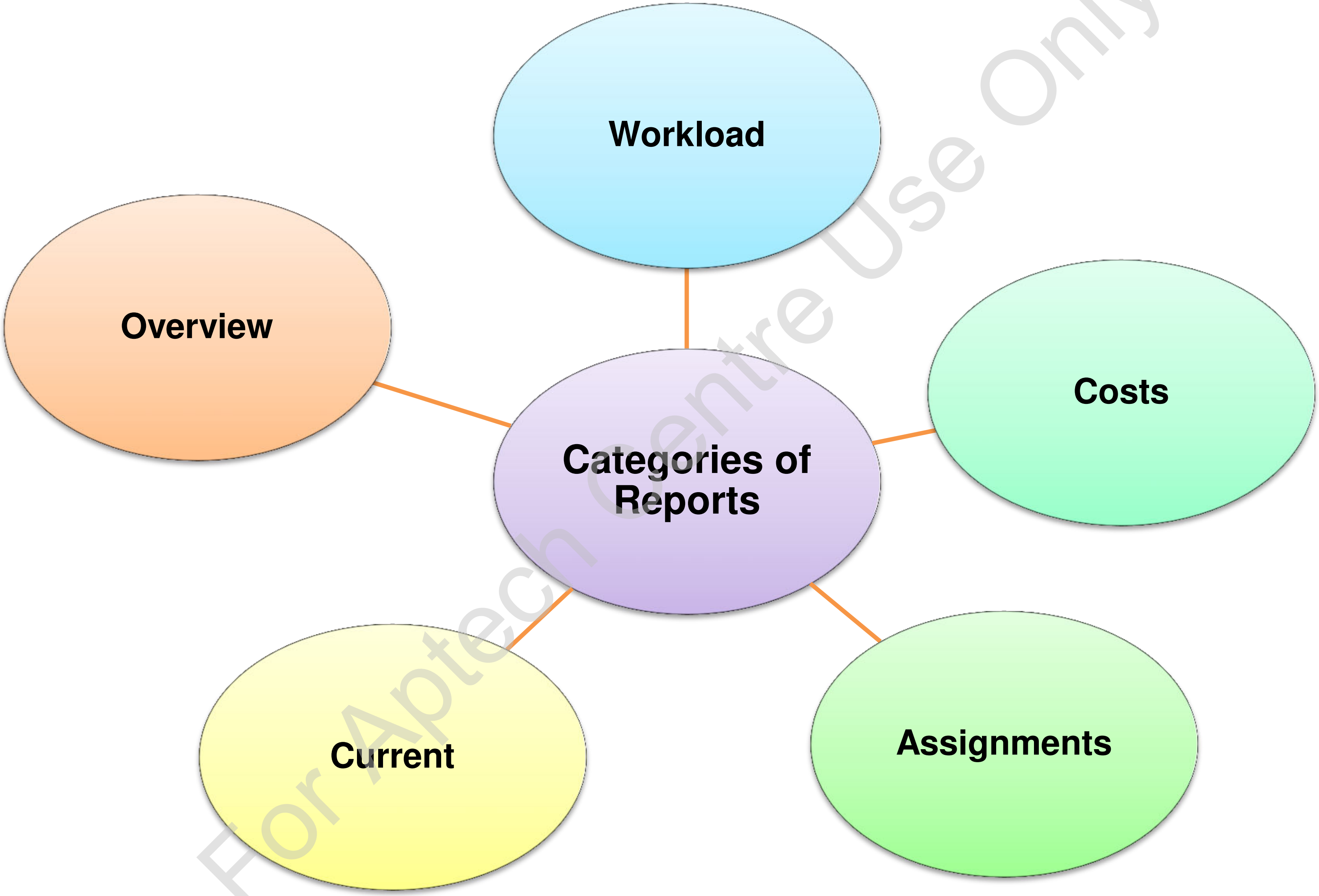
Standard Reports

- Standard reports are built-in reports that offer choices for the information to include in the reports.

- With simple clicks, project managers can click the buttons and generate standard reports that can be modified for look and feel using several ways.

- Standard reports are generated with simple clicks such as selecting a report category, choosing a specific report, and printing the report.

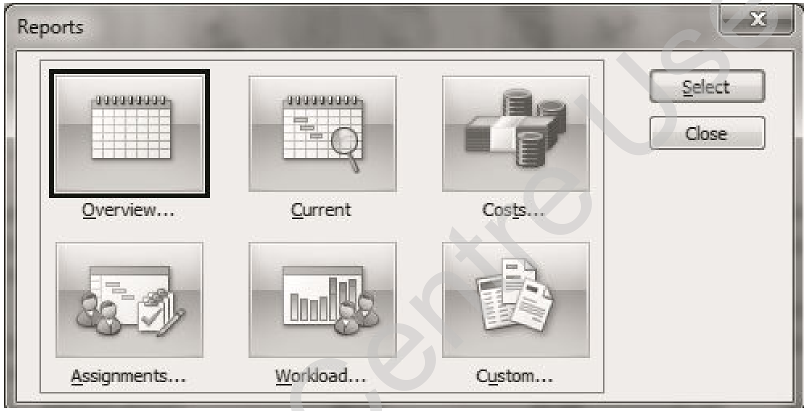
Standard Report Categories



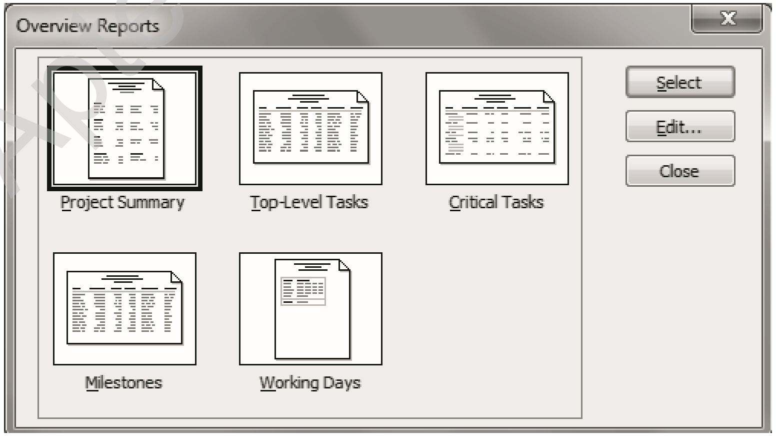
Creating Standard Reports 1-2

- To create standard reports, follow these steps:

Open the project and on the **Project** tab, click **Reports** on the **Reports** group of the **Ribbon** to display **Reports** dialog box as shown in the following figure:

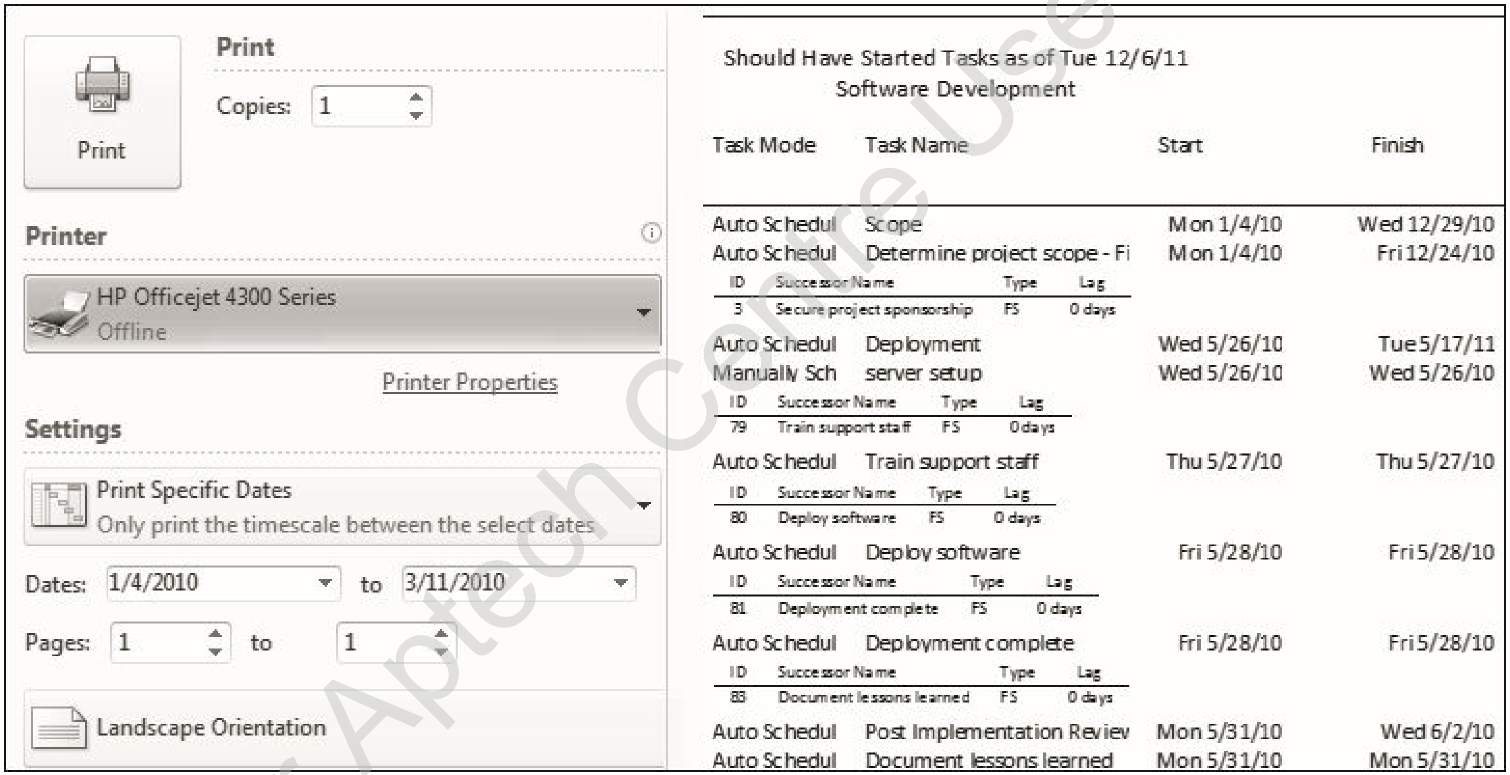


Selecting any of the six categories will open the respective reports under the category. For example, selecting **Overview** report category displays **Overview Reports** dialog box as shown in the following figure:



Creating Standard Reports 2-2

Select a report to display a preview of the report, like the **Should Have Started Tasks** as on a status date as shown in the following figure:



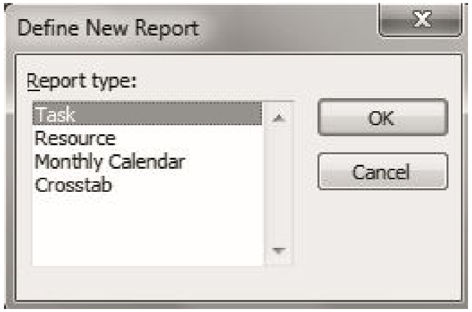
Click the large **Print** button to print. Click **Page Setup** to change page settings or use the choices under **Settings** to suit the report.

Custom Reports 1-2

- A custom report begins with a report type that can be a task, a resource, a monthly calendar, or a crosstab.
- After choosing the basic type, users can work with the same Reports dialog box that is used to edit a standard report.
- Steps to create a custom report are as follows:

1. Open the project and on the **Project** tab, click **Reports** on the **Reports** group of the **Ribbon** to display **Reports** dialog box.
2. Click the **Custom** category and then click **Select** to display the **Custom Reports** dialog box.
3. User can edit an existing report or can create a new custom report.
4. Select either to base the custom report on an existing report or create a new report.

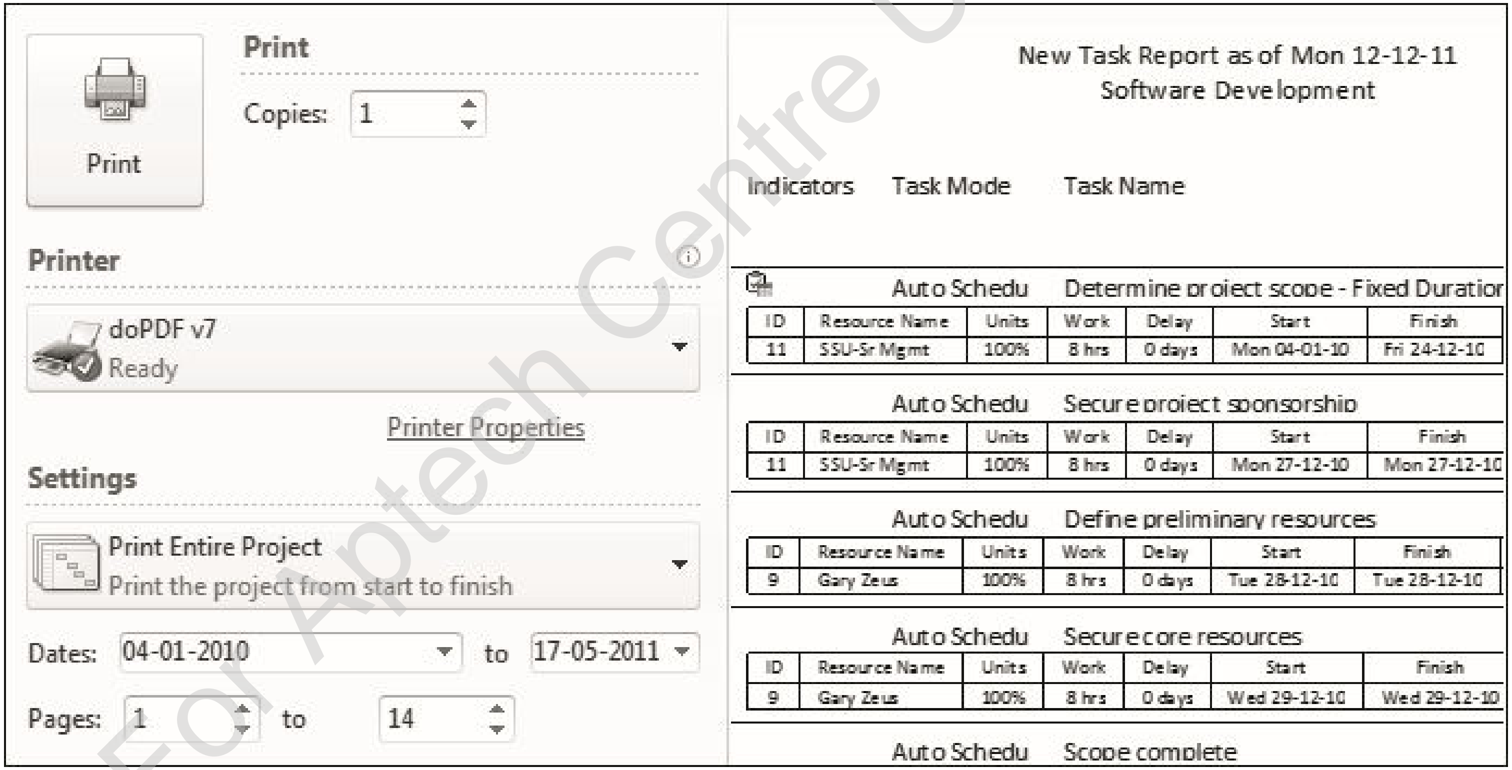
- Click the **New** button and click one of the categories in the **Define New Report** dialog box as shown in the given figure:



Custom Reports 2-2

5
- Click **OK** to save the information and return to the **Custom Reports** dialog box.

6
- Click **Select** to display the report print preview in the **Backstage** view of the project as shown in the following figure:



Modifications to Standard and Custom Reports 1-4

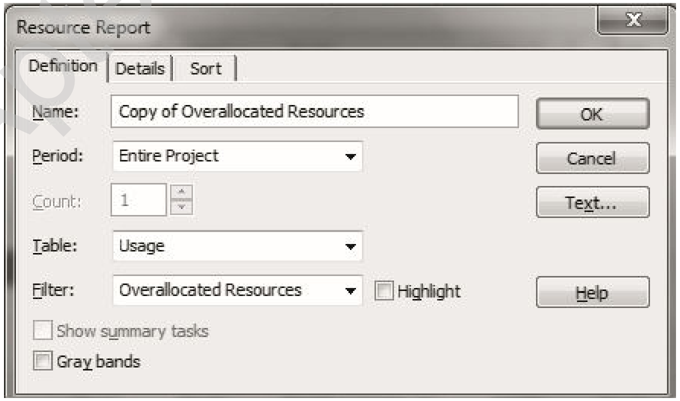
- Users can modify three elements in a standard report:

Definition → **Details** → **Sort**

- Steps to modify standard reports to create a custom report are as follows:

1. Open the project and on the **Project** tab, click **Reports** on the **Reports** group of the **Ribbon** to display the **Reports** dialog box.
2. Click **Custom** and then click **Select**.
3. Click a specific report and then click **Copy.**

- Following figure shows the **Resource Report** dialog box:



Modifications to Standard and Custom Reports 2-4

4

- On the **Definition** tab, the following selections can be made:

Type a **Name** for the new report.

Choose the **Period** of the project from the **Period** drop-down list.

Choose the **Table** to be used for the project from the **Table** drop-down list.

Choose the **Filter** to be used for the project from the **Filter** drop-down list.

Select the **Highlight** check box to highlight tasks that match the filter's criteria.

5

- Set the **Count** counter to reflect the number of increments of time from the **Period** field.

6

- On the **Details** tab, the following selections can be made:

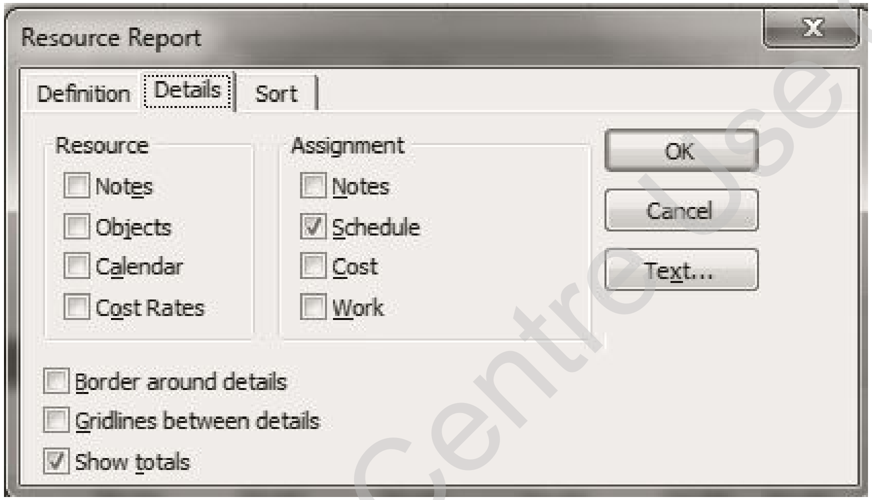
Select various check boxes to include different types of information, such as **Assignment Notes** or **Resource Cost Rates** and so forth.

To apply a border around the report, select the **Border around Details** check box.

To apply gridlines in the report, select the **Gridlines between details** check box.

To include totals, select **Show Totals** check box.

- Following figure shows the selections made in the Details tab:



7

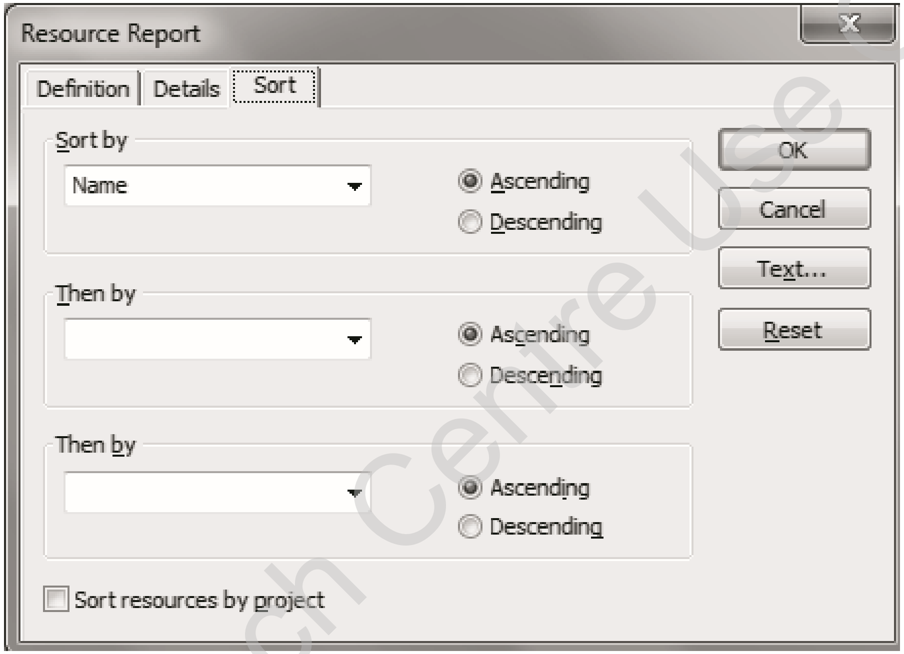
- On the **Sort** tab, the following selections can be made:

Click a sort criterion, and then select either **Ascending** or **Descending** to choose a sort order in the **Sort by** field.

To sort by additional criteria, repeat the step 7 with the **Then by** boxes.

Modifications to Standard and Custom Reports 4-4

- Following figure demonstrates the selection:



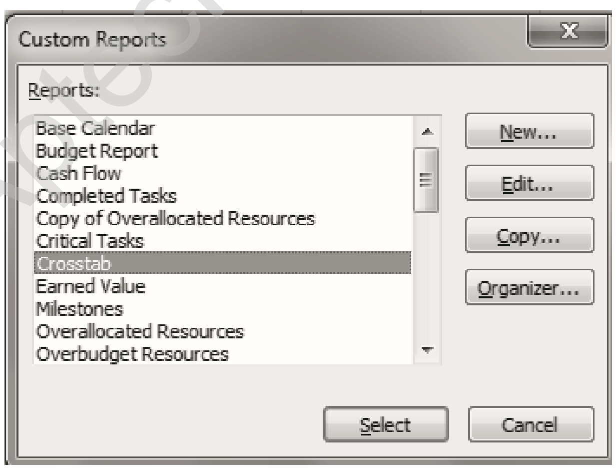
8 • Click **OK** to save the settings.

9 • Click **Select** in the **Reports** dialog box, to generate the report preview.

Crosstab Reports 1-2

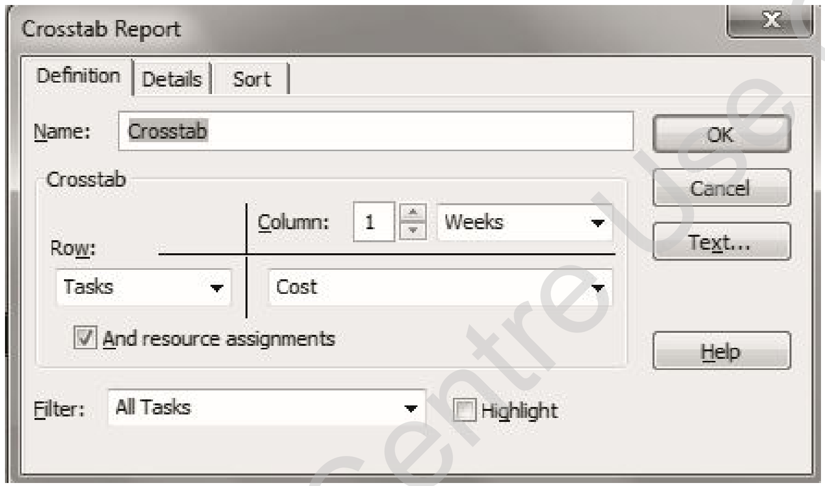
- A crosstab report represents a unique data relative to column and row definitions.
- Effectively, the cell formed by the column and row intersection represents the unique data.
- Steps to create a crosstab report are as follows:

1. Open the project and on the **Project** tab, click **Reports** on the **Reports** group of the **Ribbon** to display the **Reports** dialog box.
2. Click **Custom** and then click **Select** to display **Custom Reports** dialog box.
3. Then, select **Crosstab** as shown in the following figure:



Crosstab Reports 2-2

4
- Click **Edit** to display **Crosstab Report** dialog box as shown in the following figure:



5
- Define the column, the row, and data to be compared on the **Definition** tab.

6
- On the **Details** tab, make settings such as include row or column totals, inserting gridlines, and displaying any zero values.

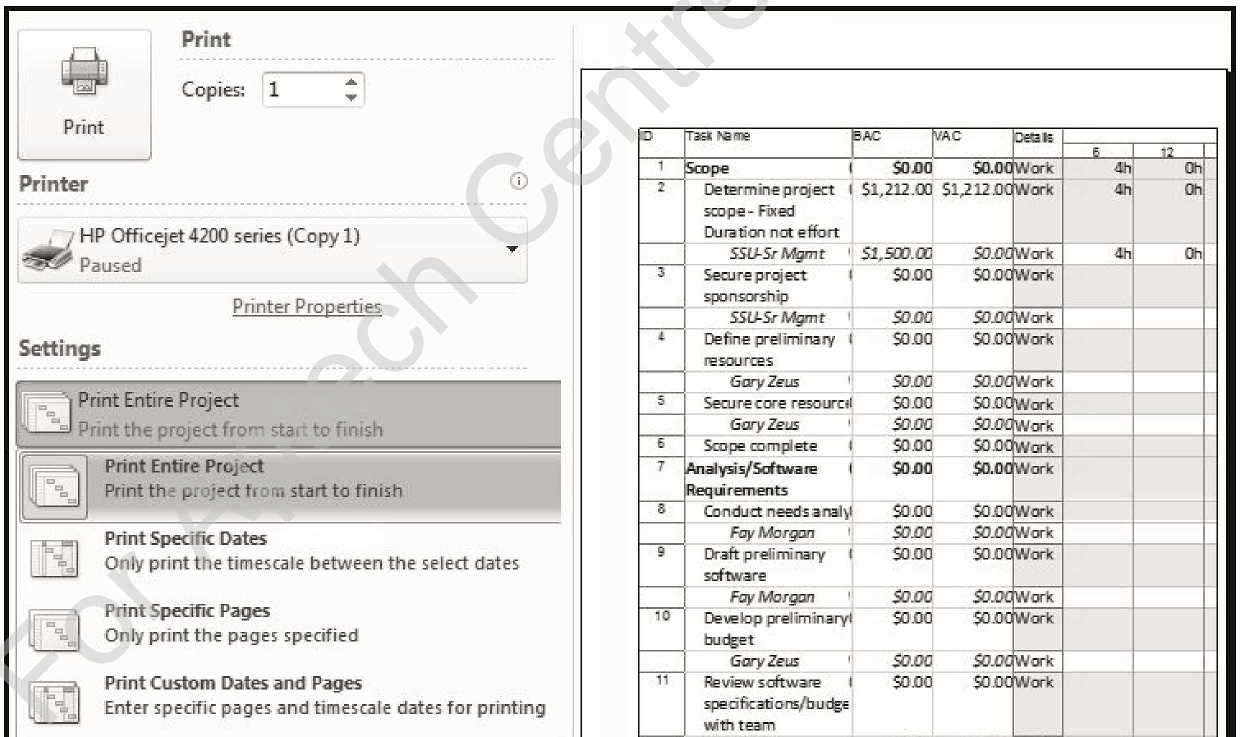
7
- Click **OK** to return to the **Custom Reports** dialog box.

8
- Click **Select** to display the print preview in the Backstage view of the project.

Printing a View 1-2

- MS Project 2010 facilitates users to print any view in a project by clicking the Print button of any view.
- To print any view, follow these steps:

Open the project in any view, and choose **Print** from the Backstage view after clicking **File** tab. This displays the various **Print** options as shown in the following figure:



Printing a View 2-2

Select **Print Entire Project** drop-down to list various print options such as **Print Specific Dates, Print Specific; Pages,** and so on.

Selecting any option on the drop-down displays the corresponding print preview on the right view pane.

Users can choose to print only certain pages of the project or only a specific date range from the timescale.

- Any filters or groups applied in the project get displayed in the printed document.

Visual Reports

- MS Project 2010 provides the capabilities of Pivot tables in the form of visual reports.
- Visual reports allow users to select the fields to view and modify the reports at any instance in the project plan.
- MS Project 2010 offers six categories of visual reports to customize and build.
- Some of the visual reports are based on timephased data such as allocations of resource time or costs.

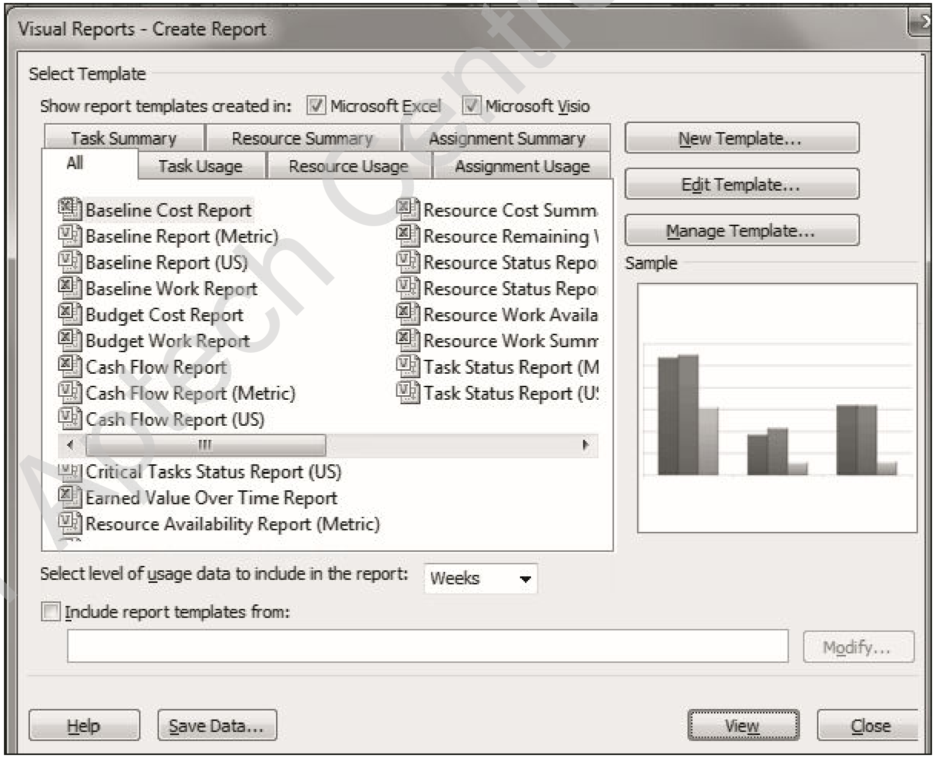
The report categories include:			
Task Usage	Resource Usage	Assignment Usage	Task Summary, Resource Summary, and Assignment Summary

Creating a Visual Report 1-2

- To create a visual report, choose a report and decide whether to generate it in Excel or Visio, and view or print the report.
- Steps to generate a standard visual report are as follows:

1

- Open the project and on the **Project** tab, click **Visual Reports** on the **Reports** group of the **Ribbon** to display Visual Reports dialog box as shown in the following figure:

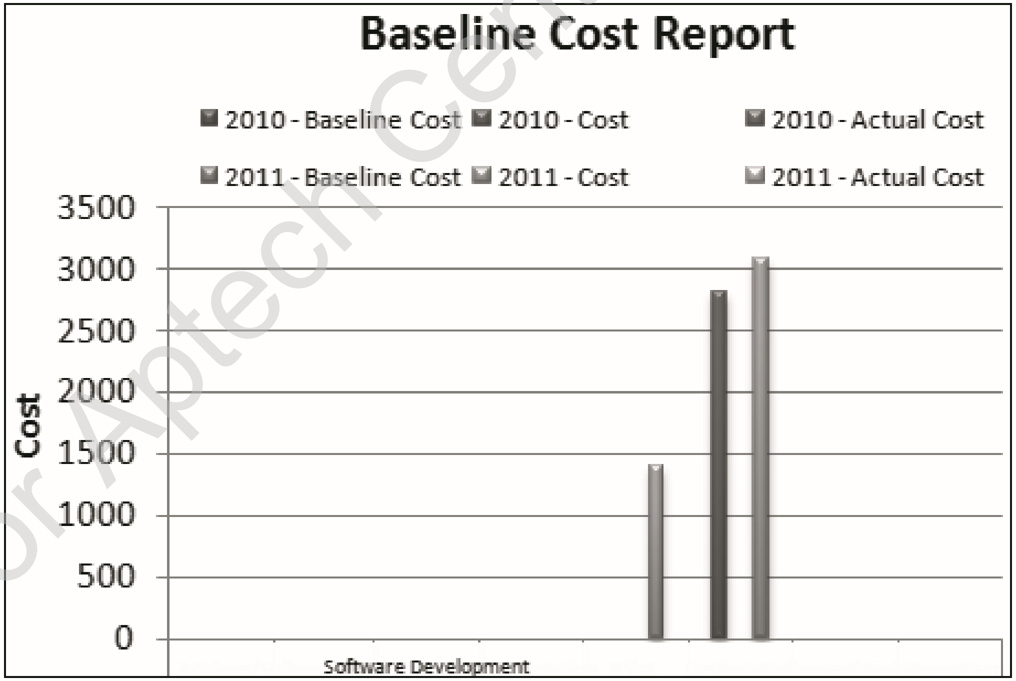


Creating a Visual Report 2-2

2
- Select **Excel** and/or **Visio** check boxes in the **Show Report Templates Created in** area to display the reports available in Excel or Visio.

3
- Select a report (in this example, the Baseline Cost Report) on the **All** tab and then click the **View** button.

- The report is generated in the selected application Excel or Visio as shown in the following figure:



Graphics in MS Project Reports 1-4

- Project managers often find the necessity to add graphics in reports such as the company logo on the header of the report or the picture of the new product, and so forth.
- MS Project 2010 offers three methods to insert graphics in a project which can then generate a report:

Cut and paste a graphic from another file.

Insert a link to an existing graphics file.

Embed a graphic.

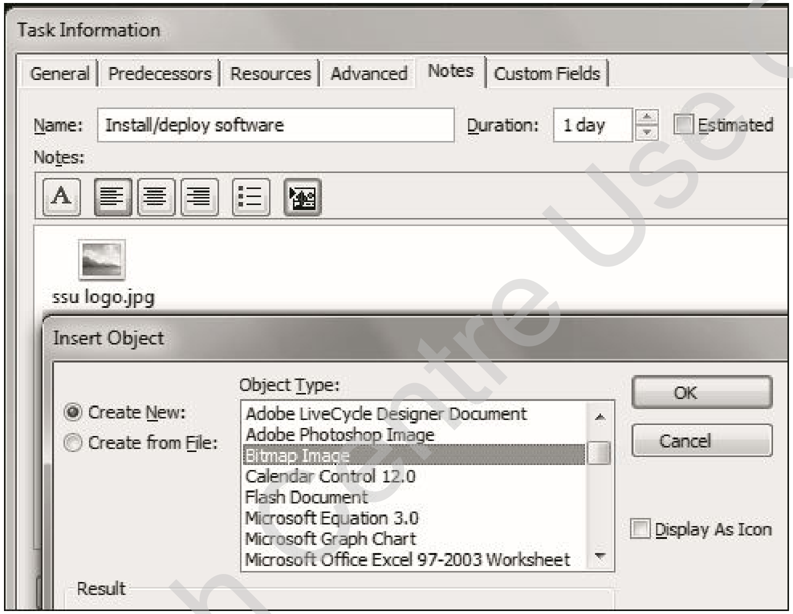
- Steps to insert an existing graphics file in a notes box are as follows:

1
- Open the project in any task oriented view or resource oriented view.

2
- Open the **Notes** tab of the **Task Information** or **Resource Information** dialog box.

3
- Click **Insert Object** icon and select the **Object Type** from the list.

- Following figure displays the **Task Information** dialog box:



4 • Choose the **Create New** option or click the **Browse** button to locate the file.

5 • To link to a file, select the **Link** check box and then click **OK**.

6 • To insert the object as an icon, select the **Display As Icon** check box.

7 • Click **OK** to display the image.

Graphics in MS Project Reports 3-4

- Steps to insert an existing graphic file in a header or footer are as follows:

Open the header or footer tab of **Page Setup** and click the **Insert Picture** button to display the **Insert Picture** dialog box.

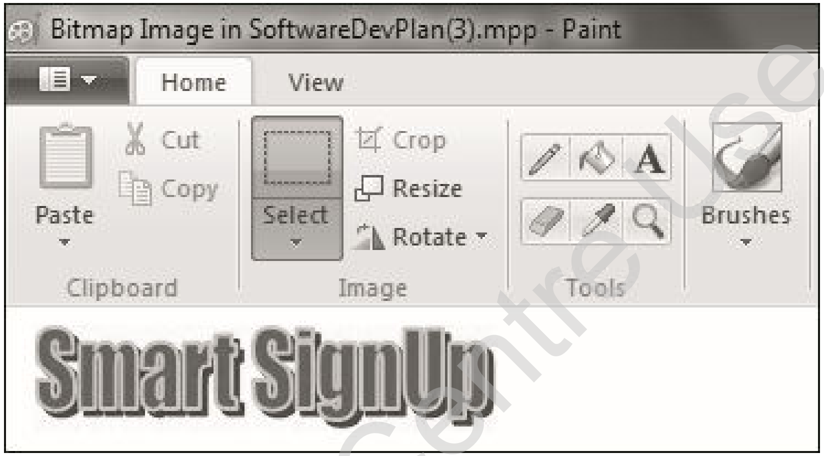
Navigate to the folder that holds the file to insert and click the file and then click **Open**. The image appears in the header or footer.

- To insert a new graphic that is created on the fly into a note, follow these steps:

1. In the **Insert Object** dialog box, select the **Create New** option.
2. From the **Object Type** list, choose the type of object that you want to insert.
3. To insert the object as an icon, select the **Display As Icon** check box.
4. Click **OK** to see a blank object box, along with tools, similar to the one in MS Paint. Create an object.

Graphics in MS Project Reports 4-4

- Following figure shows object creation in MS paint:



5
- Use the tools of the application to the inserted object to draw, edit, insert, or format the new graphic object.

6
- Close the window to return to the project file.

Formatting Reports 1-2

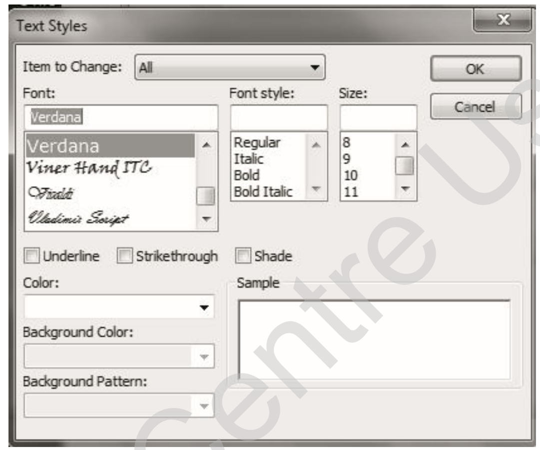
- MS Project 2010 provides all the usual formatting options available in MS Office suite to format a report.

Points to keep in mind while formatting reports:			
Font	Color	Font size	Effects

- Steps to edit report are as follows:

1. Open project and on **Project** tab, click **Reports** to display the **Reports** dialog box.
2. Click a report category and then click the **Select** button to display the Reports category dialog box.
3. Click the specific report to generate and click the **Edit** button to display **Report** dialog box.

4 • If the **Text Styles** dialog box has not opened, click the **Text** button to display the **Text Styles** dialog box as shown in the following figure:



5 • In the **Item to Change** box, select the item to format from the drop-down list.

6 • Make selections in the **Font, Font style, Size**, and **Color** fields.

7 • Make any other text-related selections such as **Underline** and so forth.

8 • Click **OK** twice to return to the **Reports** dialog box.

9 • Click **Select** to view the report preview.

Summary

- MS Project 2010 facilitates project managers with built-in and customizable reports to include the data relevant to their projects.
- Standard reports are built-in reports that offer choices for the information to include in the reports.
- MS Project provides five categories of reports with each category containing a total of 22 standard reports.
- A crosstab report represents a unique data relative to column and row definitions. Effectively, the cell formed by the column and row intersection represents the unique data.
- A custom report begins with a report type that can be a task, a resource, a monthly calendar, or a crosstab.
- MS Project 2010 provides the capabilities of Pivot tables in the form of Visual reports.
- MS Project 2010 enables project managers to add graphics to their reports.
- MS Project 2010 provides the usual formatting options available in MS Office suite to format project reports.