

Module 8

Project Reports

Objectives Covered in This Section

The Project Reports section provides with an understanding of using and creating the basic reports available in Project 2007.

- Reports
- Preview and Printing of a Report

1. Reports

A report is the information churned out of the project database, which must be useful to a stakeholder of the project to make vital decisions and control project performance. MS Project has several built-in reports which are customizable. Besides, you can create your own report with ease.

2. Preview and Printing of a Report

MS Project 2010 provides 5 different categories of predefined reports. The user can select a predefined report and print the desirable data.

The category of reports are listed below with details of reports under each category,

Overview

Overview report shows information over the entire project duration. This includes the following reports,

- Project Summary
- Top Level tasks
- Critical Tasks
- Milestones
- Working Days

Current Activities

Current activity report shows a variety of task information. This includes the following reports,

- Un Started Tasks
- Tasks starting soon
- Tasks in Progress
- Completed Tasks
- Should have started tasks
- Slipping tasks

Costs

Cost report show budgets for all tasks over the entire project duration. This includes the following reports,

- Cash Flow
- Budget
- Over-budget Tasks
- Over-budget Resources
- Earned Value

Assignments

Assignment reports show assignments for all resources over the entire project duration. This includes the following reports,

- Who does what
- Who does what when
- To do list
- Over-allocated resources

Workload

Workload report shows task usage or resource usage information. This includes the following reports,


- Task Usage
- Resource Usage

Custom

There is an extra category of report called Custom, which allows you to create a new report or to customize or copy any of an existing report from above categories.

2.1 Previewing Reports

The following are the steps involved in previewing a report,

1. To select a predefined report, go to Project tab → Reports 
2. A window with icons for all reports under different categories is opened, as shown below,

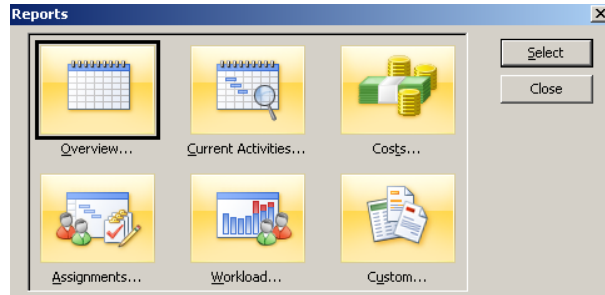


Fig 8.1: Reports

3. To open a category and view reports under that category, double click on the icon. This will show all the reports under the selected report category.

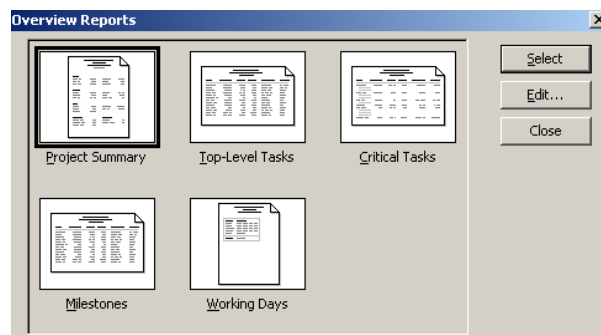


Fig 8.2: Overview Reports

4. Select the report that matches your criteria and you will be able to view the report with the data, as shown in the figure below,

Software Development

as of 11/18/07

Dates			
Start:	Mon 1/1/07	Finish:	Mon 5/14/07
Baseline Start:	NA	Baseline Finish:	NA
Actual Start:	NA	Actual Finish:	NA
Start Variance:	0 days	Finish Variance:	0 days
Duration			
Scheduled:	95.75 days	Remaining:	95.75 days
Baseline:	0 days	Actual:	0 days
Variance:	95.75 days	Percent Complete:	0%
Work			
Scheduled:	1,532 hrs	Remaining:	1,532 hrs
Baseline:	0 hrs	Actual:	0 hrs
Variance:	1,532 hrs	Percent Complete:	0%
Costs			
Scheduled:	\$0.00	Remaining:	\$0.00
Baseline:	\$0.00	Actual:	\$0.00
Variance:	\$0.00		
Task Status		Resource Status	
Tasks not yet started:	86	Work Resources:	4
Tasks in progress:	0	Overallocated Work Resources:	4
Tasks completed:	0	Material Resources:	0
Total Tasks:	86	Total Resources:	8

Fig 8.3: Report

- To print the report, a pre-requisite is to have a printer installed on the system. Go to File → Print and print the report.

Visual Reports

Why Visual Reports?

Visual Reports focuses on sharing project schedule details with other applications, i.e. it assists the user to create charts and diagrams easily in Microsoft Office Excel® 2007 or 2003 and Microsoft Office Visio® Professional 2007 respectively of the project data. Visual Reports creates report templates that may be reused with different projects.

Visual reports that are exported to Excel utilize the **Pivot Table** and **Pivot Chart** features in Excel. You can format the chart and modify the details in the PivotTable report from which the chart is derived. PivotTable reports are best suited for analyzing and summarizing large and complex Project schedules. Visual Reports are compatible with Microsoft Excel 2003 or later.

Visual reports that are exported to Visio utilize the **Pivot Diagrams** features that are introduced in Visio 2007. You can customize as well as filter and rearrange the data from which the diagram is derived. Pivot Diagrams are best suited for presenting hierarchical data and can complement Project very well. Visual Reports are compatible with Microsoft Visio 2007 or later.

1. To view Visual Reports, select the data and go to Reports → Visual Reports and the subsequent window opens.

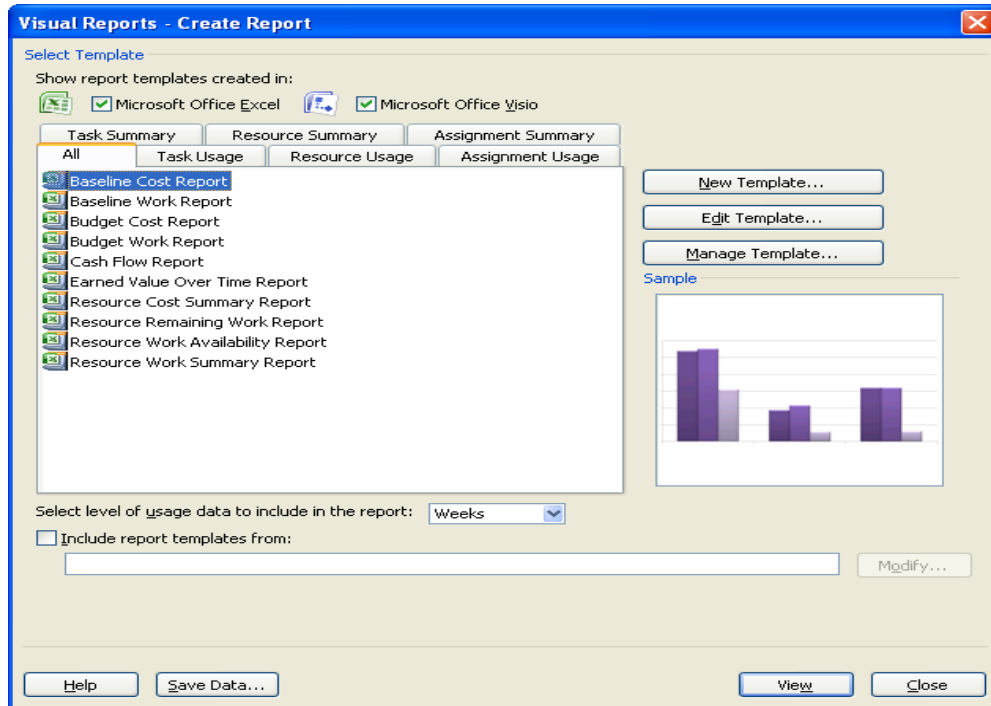


Fig 7: Creating a Visual Report

2. If you intend to view Report templates created in either Microsoft Office Excel or Microsoft Office Visio, check the desired option and if you intend to view templates from both, check both the options.
3. Let's create a visual report that will be generated in Microsoft Office Excel.
4. Under the Resource Usage tab, click 'Resource Work Availability Report' and select View.
5. Microsoft Project will open the report in Microsoft Office Excel with a temporary name, as the following figure shows,

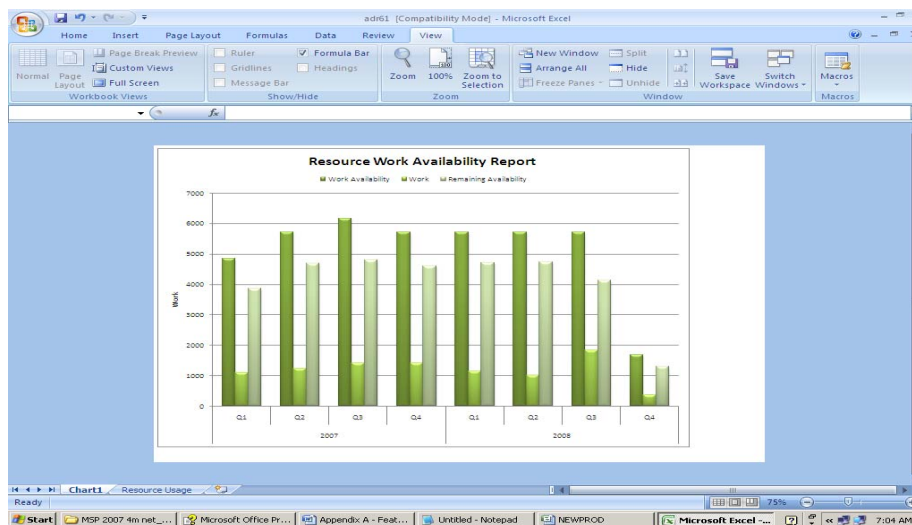


Fig 8: Resource Work Availability Report

6. You can also create new templates in Visual reports by selecting the option 'New Template'.
7. In the 'New Template' window, the user has to define the application that he needs to use for creation of the report template. The user can also state the data on which he needs to report and can customize the report by selecting specific fields from the Field Picker.

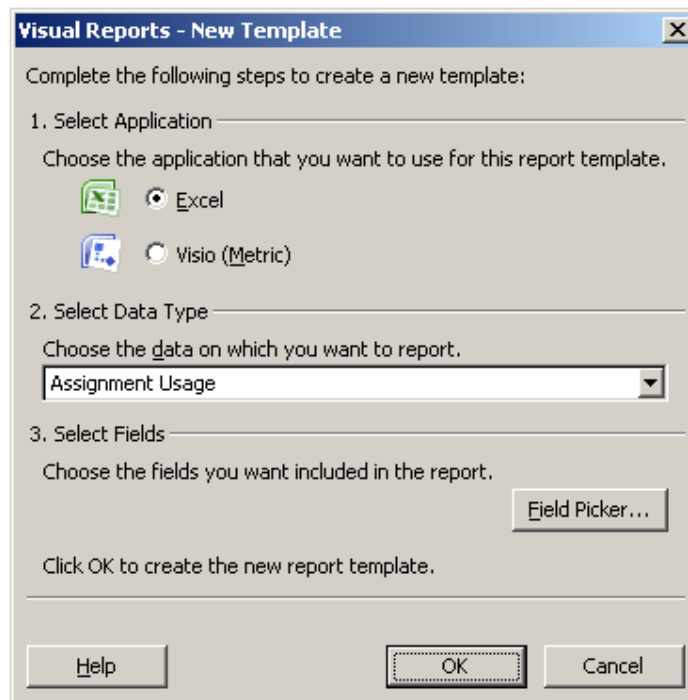


Fig 9: New Template

8. You can also edit and manage the existing templates by selecting the options 'Edit Template' and 'Manage Template'.



Exercise

1. Create and Print the following Reports for your project:-
 - I. Project Summary Report
 - II. Critical Tasks Report
 - III. Over Budget Resources Report
 - IV. Resource Usage Report
2. Create following Visual Reports: -
 - I. Baseline Cost Report
 - II. Resource Work Availability Report
 - III. Baseline Report
 - IV. Critical Task Status Report

Notes