

Project Reporting with Excel And MS Project

Some high level instructions:

- It is advisable that you save a copy of the files once you have configured them.
- Modifying any views, filters formulas, sheets, scripting is done at your own risk. I have spent a tremendous amount of time formatting this to work as it stands.
- This is a work in progress for me. You might have better ways of doing things, and you are welcome to do so, but, see the second bullet here.
- I am offering this file for free, you can distribute to anyone you want. I ask that you not sell it, or publish it as your own.
- As this is a free offering, I don't offer any warranties or support. Don't even ask.

There are three files used in this process:

1. Project Schedule July 2022.mpp –
 - a. This schedule has three views you need
 - i. [Report] Export
 - ii. [Report] RAG Export
 - iii. [Report] Status Update Report
 - b. It also has three filters you may need
 - i. [REPORT] 30-60 Day Starts
 - ii. [REPORT] 60-90 Day Starts
 - iii. [REPORT] 90-120 Day Starts
2. Milestone Status Report July 2022
 - a. This file has two sheets
 - i. Action Items
 - ii. Mail Info
 - b. And one module with some scripting
 - i. Mailermacro
3. RAG Report July 2022
 - a. This file has nine sheets
 - i. Table Of Contents
 - ii. Dashboard
 - iii. RAG Status
 - iv. Project Manager Status
 - v. Task Counts
 - vi. Tables
 - vii. Schedule
 - viii. Raw Schedule
 - ix. File Info

Process:

There are three major steps in the report process

1. Request team updates
2. Compile updates
3. Generate the RAG report

Team Updates

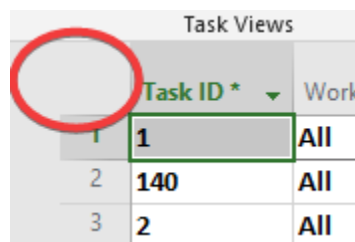
Starting with the project schedule, there are a few scenarios you need to consider. How far in advance do you want your team to provide updates, and the type of updates you get, and how frequently these feed into your full status report. I get team updates weekly, this means I prep the project file once a week and I expect the feedback within 1 or two business days. Other projects this might be a semi monthly process.

Procedure:

1. On the View Tab, in the task views group -> select "Gantt Chart -> [REPORT] Status Update Report. This brings up the fields needed for the export.
2. Now you need to decide if you want the entire schedule updated, or a date range. If you want a date range, in the View Tab, Data group, select Filter -> then one of the report views for the date range you'd like to select.

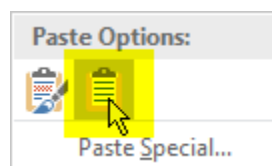
Note: this filter chooses start, if you would like to select on finish, you'd need to edit the filter.

3. Click the upper left corner of the view:



	Task ID *	Work
1	1	All
2	140	All
3	2	All

4. This selects the view, on the Task tab, in the clipboard group, select copy ->copy
5. Open the Milestone Status Report July 2022.xlsm file, go to cell A2, then from the Home Group, select Paste ->then select the plain clipboard icon, this matches the destination formatting and keeps the Excel Table:



6. On the developer tab, Code group, choose macros-> then select the macro named "ActionItems" and run it. Depending on the number of items and emails, this may take a couple of minutes.

Note: If you run this for a large schedule and you do not have the computing resources, this will crash. This is why you will want to run this for less than 120 days, hence the filters.

7. Once the emails generate, you can do any editing of the test, and click send.

Due to the level of effort on this macro, it is password protected. If you want this macro customized, you will need to DM me on Reddit "theWolf1970" to discuss options.

Compile updates

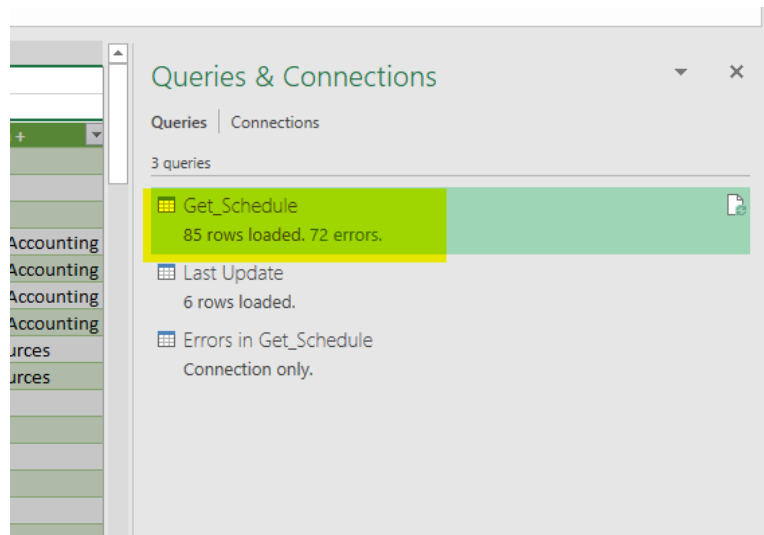
1. This is the easy step, once your team has provided you with updates, you can filter on their name, task IDs, or workstream, and paste them into the schedule.
2. Keep in mind, this view is showing you custom date fields, I do not change my dates on every cycle. I simply update the expected dates, set a change flag in my schedule, and then on a regular basis, I rebaseline. **This is my process, you may have to adapt it to your own baseline process.**
3. Update the Project status date Project Group->Status Group->Status Date->select the status date. This is important as the RAG report uses the status dates for a few fields.

Generate the RAG report

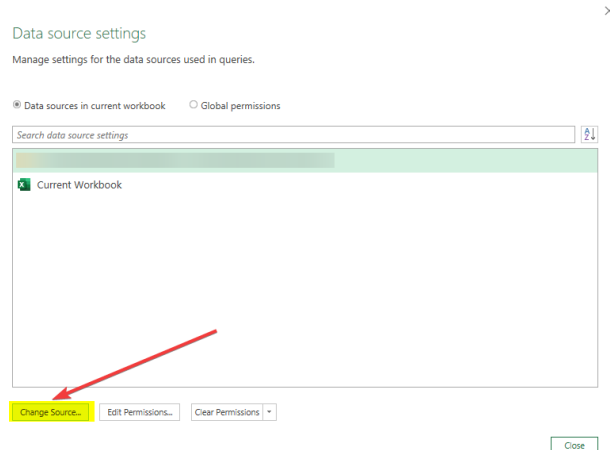
This file requires a little setup. You need to put all three files in a specific directory on your machine. You need to then get that directory path and edit the source in the query to make this work.

Updating the source file

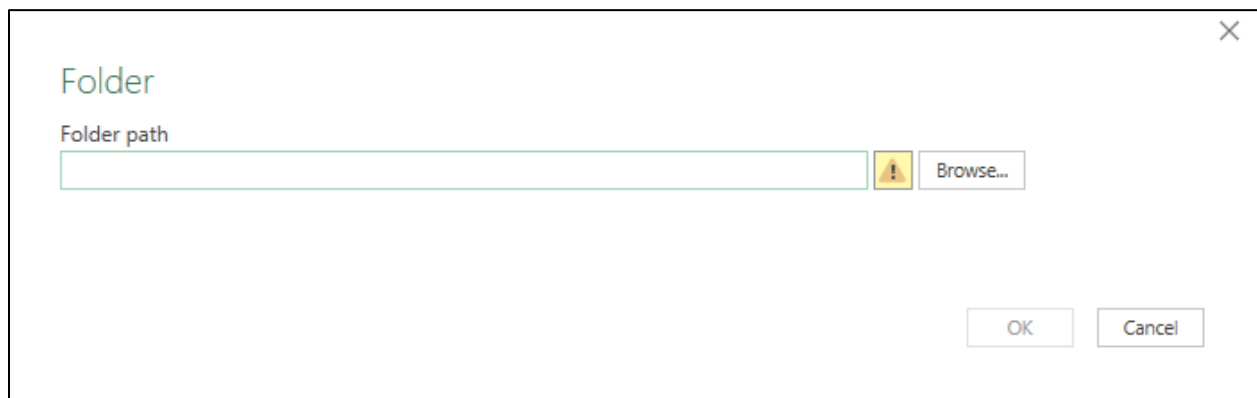
1. In the Data tab, Queries & Connections gGroup, click Queries and Connections. This will display the Q&C menu in the side bar.
2. Right click on the query labeled "Get_Schedule":



3. Select "Edit" from the sub menu and the Power Query editor will open.
4. On the Home Tab, Data Sources group, click on "Data source Settings":



5. In the dialog box, click “Browse” and navigate to the folder where the files have been stored:



6. Click OK, then close on the Data Source Settings dialog box
7. On the PowerQuery editor, Home Tab, Close Group, click Close & Load
8. The query will run and the data will automatically refresh. Ignore any errors at this point.

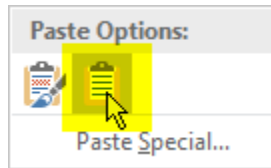
Run the report

1. Open the Project schedule and select the [Report].
2. On the View Tab, in the task views group -> select “Gantt Chart -> [REPORT] RAG Export. This brings up the fields needed for the export.
3. **Do not filter your schedule.** The query in Excel will filter out the inactive and closed tasks.
4. Click the upper left corner of the view:

Task Views		
	Task ID *	Work
1	1	All
2	140	All
3	2	All

5. This selects the view, on the Task tab, in the clipboard group, select copy ->copy
4. Open the RAG Report July 2022.xlsx file.

5. Navigate to the “Raw Schedule” sheet.
8. Click on cell A3, and from then from the Home Group, select Paste ->then select the plain clipboard icon, this matches the destination formatting and keeps the Excel Table:



6. On the Data Tab, Queries and Connections Group, click “Refresh All”.

Now just review your report. I’ll probably create another document to document that report as it has several fields and formulas that will need explaining.