

CHAPTER 1

InFocus

WPL_J420

PREDEFINED REPORTS

Microsoft Project features a number of built-in reports.

Not to be confused with the standard printing features of **Microsoft Project**, the reports are actually made up from data across the two tables, tasks and resources, and specific views and filters.

They are based on settings rather than views of data on the screen. Hence they are *predefined*.

Special Note: You'll need Microsoft Office Service Pack 1 or later to be installed for some of the features in this chapter to work. There was a bug in versions prior to Service Pack 1 which prevented Custom Reports (which are dealt with here) from displaying on the screen.

In this session you will:

- ✓ gain an understanding of predefined reports
- ✓ learn how to use a predefined report
- ✓ learn how to use report lists
- ✓ learn how to modify an existing report
- ✓ learn how to run a crosstabulation report
- ✓ learn how to dissect a crosstabulation report
- ✓ learn how to create a crosstabulation report
- ✓ learn how to adjust the details and sort order in a custom report
- ✓ learn how to share a custom report with other projects.

UNDERSTANDING PREDEFINED REPORTS

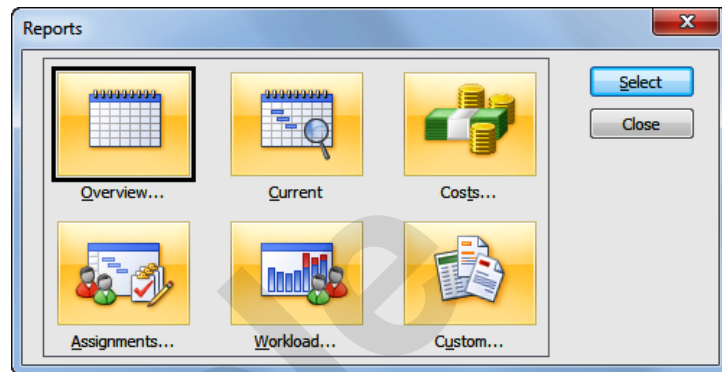
Microsoft Project will allow you to print or preview the view that is currently on the screen. This makes it very easy to obtain instant information about the status of your project. However,

Microsoft Project also features 22 **predefined reports** that provide key information about your project. These reports can be printed at any time no matter which view you currently have.

The Predefined Reports

There are 22 predefined, built-in reports in **Microsoft Project** which have been categorised as shown below.

The reports are accessed from the **Reports** command in the **Reports** grouping on the **Project** tab of the **Ribbon**. When you choose this command a **Reports** dialog box will appear showing six report categories.

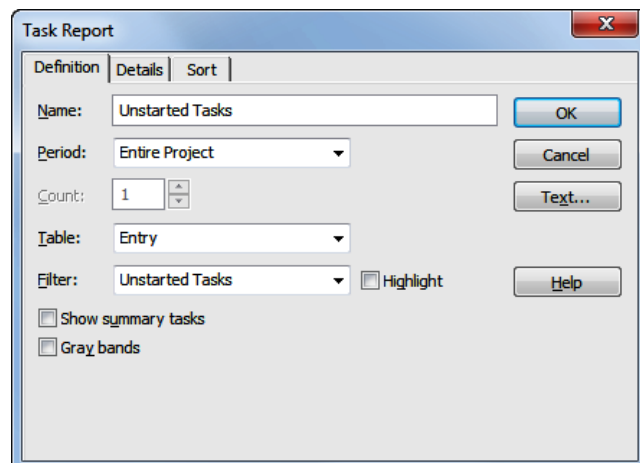


Category	Report Name
Overview	Project Summary
	Top-Level Tasks
	Critical Tasks
	Milestones
	Working Days
Current Activities	Unstarted Tasks
	Tasks Starting Soon
	Tasks In Progress
	Completed Tasks
	Should Have Started Tasks
	Slipping Tasks

Category	Report Name
Costs	Cash Flow
	Budget
	Overbudget Tasks
	Overbudget Resources
	Earned Value
Assignments	Who Does What
	Who Does What When
	To-do List
	Overallocated Resources
Workload	Task Usage
	Resource Usage

Custom Reports

In addition to the 22 reports that are already in **Microsoft Project** you can define your own custom reports. This is done by choosing a specific layout and then adding the bits and pieces you need to create your own custom report.



USING A PREDEFINED REPORT

The predefined reports in **Microsoft Project** can be found in the **Reports** dialog box. This dialog box is broken down into a further six areas each with its own group of reports. The **Reports** dialog

box is accessed from the **Reports** command on the **Project** tab of the **Ribbon**. When you click on a report you will be able to select it so that you can see it or edit it to make changes to the layout.

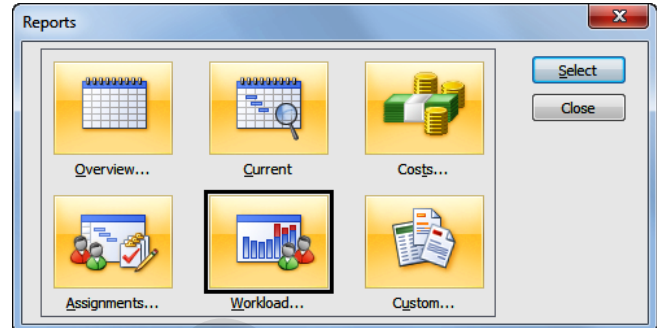
Try This Yourself:

Open
File

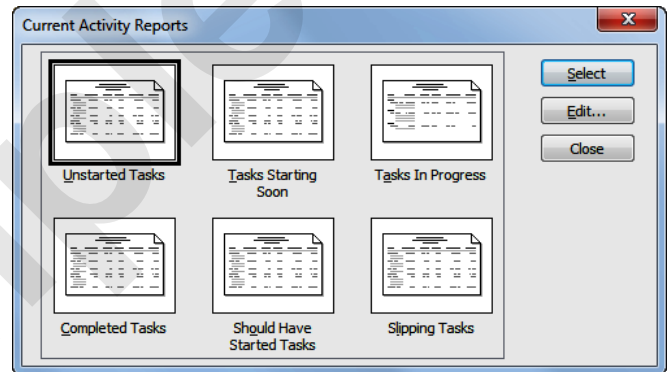
Before starting this exercise you **MUST** open the file J420 Reports_1.mpp...

- 1 Click on the **Project** tab on the **Ribbon** and click on **Reports** in the **Reports** grouping to see the **Reports** dialog box
- 2 Click on **Current** and click on **[Select]** to see **Current Activity Reports**
- 3 Click on **Unstarted Tasks** and click on **[Select]** to preview the report
- 4 If the report appears in multiple pages click on the first page to zoom it
- 5 Click on the **Project** tab, click on **Reports**, click on **Costs** and click on **[Select]** to see the **Cost** reports
- 6 Click on **Budget** and click on **[Select]** to preview the report
- 7 If the report appears in multiple pages click on the first page to zoom it
- 8 Click on the **Project** tab to return to the project – repeat the above steps and try some of the other reports

1



2



4

ID	Indicators	Task Mode	Task Name	Duration	Start	Fin.
20		Auto Schedul	Building Construction Completed	0 days	Wed 2/03/16	W
22		Auto Schedul	Fit all windows and doors	2 wks	Thu 3/03/16	We
23	ID	Resource Name	Units	Work	Delay	Start
	8	Carpenter	500%	375 hrs	0 days	Thu 3/03/16
	10	Labourer	200%	150 hrs	0 days	Wed 16/03/16
23	ID	Resource Name	Units	Work	Delay	Start
	10	Labourer	200%	75 hrs	0 days	Thu 3/03/16
	27	Electrician	300%	112.5 hrs	0 days	Wed 9/03/16
25		Auto Schedul	Install all plumbing	2 wks	Thu 3/03/16	W

For Your Reference...

To use a **predefined report**:

1. Click on the **Project** tab and click on **Reports**
2. Click on a category and click on **[Select]**
3. Click on a report and click on **[Select]**

Handy to Know...

- Once a report is in the preview screen it is like any other printing job. It can be seen with multiple pages or as a single page, and it can rescaled. Some options, however, such as headers, footers, and legends may be switched off.

USING REPORT LISTS

The predefined reports are organised logically and neatly in the various categories found in the **Reports** dialog box. However, you can also see all of the reports listed alphabetically if this is your

preferred way of working. The **Report** lists are found through the **Custom** category in the **Reports** dialog box.

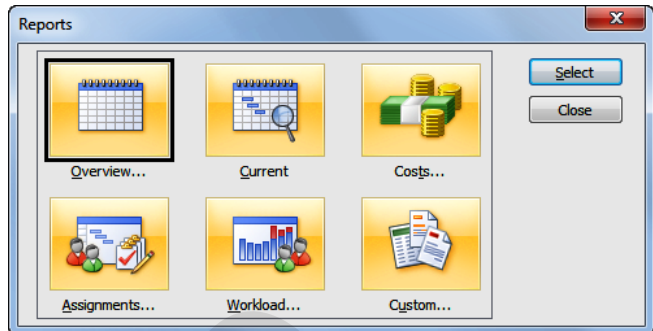
Try This Yourself:

Same
File

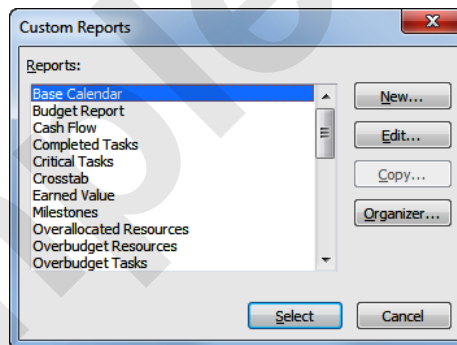
Continue using the previous file with this exercise, or open the file J420 Reports_1.mpp...

- 1 Click on the **Project** tab on the **Ribbon** and click on **Reports** in the **Reports** grouping to see the **Reports** dialog box
- 2 Click on **Custom** and click on **[Select]** to see the **Custom Reports** dialog box which lists all of the predefined reports
- 3 Click on **Base Calendar** and click on **[Select]** to see the report in a preview window
- 4 If the report appears in multiple pages click on the first page to see the detail
- 5 Click on the **Project** tab – use the instructions above and examine some of the other reports in the custom list

1



2



4

Base Calendar as of Wed 12/10/11
The Rostadium Project
Scott Harris

BASE CALENDAR:	
Day	Standard Hours
Monday	7:30 AM - 12:30 PM, 1:00 PM - 3:30 PM
Tuesday	7:30 AM - 12:30 PM, 1:00 PM - 3:30 PM
Wednesday	7:30 AM - 12:30 PM, 1:00 PM - 3:30 PM
Thursday	7:30 AM - 12:30 PM, 1:00 PM - 3:30 PM
Friday	7:30 AM - 12:30 PM, 1:00 PM - 3:30 PM
Saturday	Nonworking
Sunday	Nonworking
Exceptions:	
Date	Hours
Mon 21/12/15 - Mon 4/01/16	Nonworking

For Your Reference...

To use **report** lists:

1. Click on the **Project** tab and click on **Reports**
2. Click on **Custom** and click on **[Select]**
3. Click on a report and click on **[Select]**

Handy to Know...

- All reports are made up of predefined settings that can be altered or customised. As such all reports appear in the **custom** listing.

MODIFYING AN EXISTING REPORT

The predefined reports in **Microsoft Project** are actually report **settings** that have been created for you. The settings are placed in a special settings dialog box. This dialog box can be edited

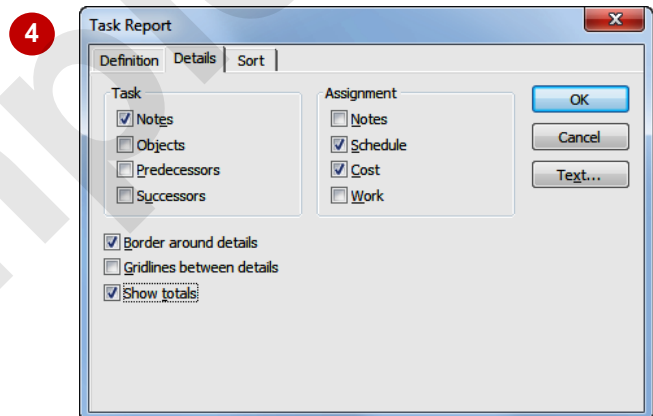
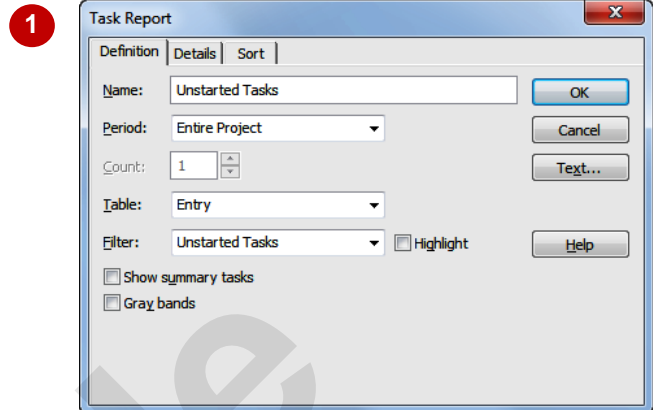
and the settings in it modified allowing you to tweak the way the report runs. Basically the settings are placed on three tabs – **definition**, **details**, and **sorting order**.

Try This Yourself:

**Same
File**

Continue using the previous file with this exercise, or open the file J420 Reports_1.mpp...

- 1 Click on the **Project** tab on the **Ribbon** and click on **Reports** in the **Reports** grouping, click on **Custom** and click on **[Select]**
- 2 Scroll to and click on **Unstarted Tasks** and click on **[Edit]** to see the **Task Report** dialog box
- 3 Click on the **Definition** tab and click on **Grey bands** until it appears ticked
- 4 Click on the **Details** tab and change it so that the following settings are ticked: **Cost**, **Border around details**, and **Show totals**
- 5 Click on **[OK]** to return to the **Custom Reports** dialog box
- 6 Ensure **Unstarted Tasks** is still selected and click on **[Select]** to see the report in preview mode
- 7 If necessary click on the first page to see the details
- 8 Click on the **Project** tab



ID	Indicators	Task Mode	Task Name	Duration	Start
20		Auto Schedul	Building Construction Completed	0 days	Wed 4
22		Auto Schedul	Fit all windows and doors	2 wks	Thu ..

ID	Resource Name	Units	Work	Delay	Start	Finish	Cost	Baseline
8	Carpenter	500%	375 hrs	0 days	Thu 3/03/16	Wed 16/03/16	\$10,080.00	\$10,080.00
10	Labourer	200%	150 hrs	0 days	Thu 3/03/16	Wed 16/03/16	\$2,325.00	\$2,325.00

ID	Indicators	Task Mode	Task Name	Duration	Start
23		Auto Schedul	Install electrical cabling	1 wk	Thu 3/

For Your Reference...

To modify a predefined report:

1. Click on the **Project** tab, click on **Reports**, click on **Custom** and click on **[Select]**
2. Click on the report to edit and click on **[Edit]**
3. Modify the settings as appropriate

Handy to Know...

- It is a good idea to make a copy of a report definition before modifying it. You can do this using the **[Copy]** button on the **Custom Reports** listing dialog box.

CROSSTABULATION REPORTS

Several of the predefined reports in Microsoft Project are based upon **crosstabulations**. In **crosstabulations** two fields are compared against one another and the results are

presented in a table format not unlike a spreadsheet. These types of reports are more sophisticated than their contemporaries and it is a good idea to see how they work.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file J420 Reports_2.mpp...

- 1 Click on the **Project** tab on the **Ribbon** and click on **Reports** in the **Reports** grouping, click on **Custom** and click on **[Select]**

- 2 Click on **Cash Flow** and click on **[Select]**

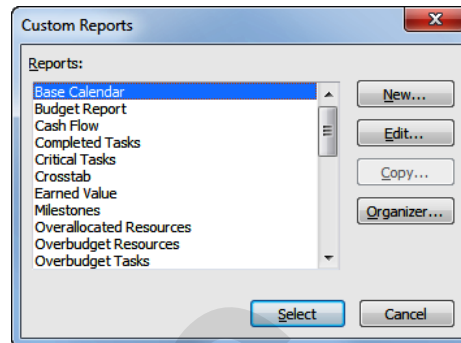
- 3 Click on the first page to see more detail
The Cash Flow report appears in a spreadsheet-like format with tasks listed down the left side and weeks across the top. The report totals costs on a weekly basis for tasks...

- 4 Spend a few moments studying the report

- 5 Click on the **Project** tab

- 6 Repeat the above steps and try some of these other crosstabulation reports: **Crosstab**, **Who Does What When**, **Resource Usage** and **Task Usage**

1



Cash Flow as of Thu 13/10/11
The Rostadium Project
Scott Harris

	11/05/15	18/05/15	25/05/15	1/06/15
Planning				
Create architectural plans	\$1,125.00	\$1,125.00	\$19,125.00	
Submit plans for approval				\$1,125.00
Order materials				
Planning Completed				
Site Works				
Erect fencing				
Erect site buildings				
Clear and level site				
Prepare drainage infrastructure				

3

For Your Reference...

To run a **crosstabulation** report:

1. Click on the **Project** tab, click on **Reports**, click on **Custom** and click on **[Select]**
2. Click on the desired report and click on **[Select]**

Handy to Know...

- You can always tell a crosstabulation report because it appears in a spreadsheet like format with the data presented in a table.

DISSECTING A CROSSTABULATION REPORT

Crosstabulation reports are complex because they involve the interplay between two data fields. Basically a **crosstabulation** needs to know which field to use for the rows and which to

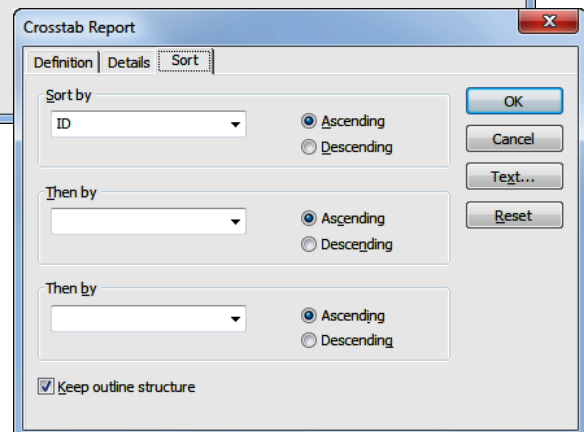
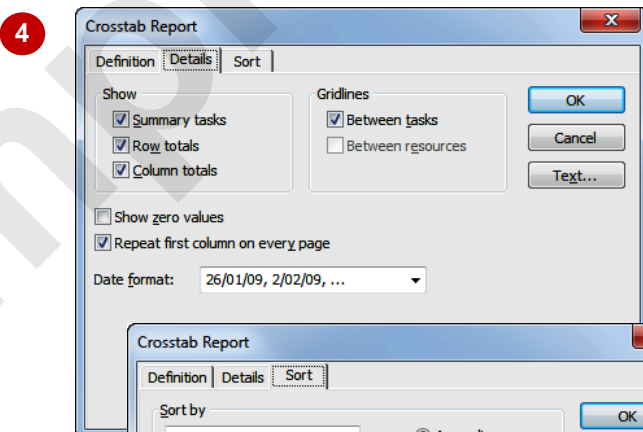
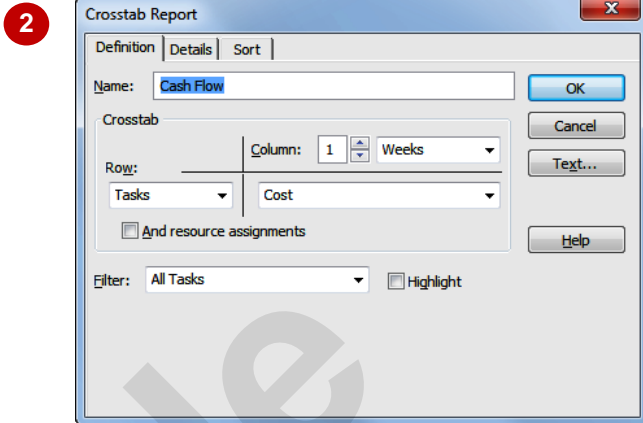
use for the columns. It also needs to know the value to tabulate. It's easy enough to create your own **crosstabulation** report but it is a good idea to dissect an existing one first.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file J420 Reports_2.mpp...

- 1 Click on the **Project** tab on the **Ribbon** and click on **Reports** in the **Reports** grouping, click on **Custom** and click on **[Select]**
- 2 Click on **Cash Flow** and click on **[Edit]** to display the **Crosstab Report** dialog box
- 3 Click on the **Definition** tab (if it is not already in view) and spend a few moments studying the settings, especially the fields that have been used
- 4 Click on the **Details** tab and then the **Sort** tab and study the settings
- 5 Click on **[OK]** to return to the **Custom Reports** dialog box
- 6 Click on **[Close]**



For Your Reference...

To dissect a **crosstabulation** report:

1. Click on the **Project** tab, click on **Reports**, click on **Custom** and click on **[Select]**
2. Click on the desired report and click on **[Edit]**

Handy to Know...

- The **[Text]** button that appears in the **Crosstab Report** dialog box allows you to format the text that is used in the report. Here you can change the font, font size, colour, etc, of the text.

CREATING A CUSTOM CROSSTABULATION

Microsoft Project allows you to create your own custom reports, including the more complex **crosstabulation** variety. As with most aspects of design and **customisation** in Microsoft Project it

is a good idea to know what you want to do before tackling the task. We are going to create a **crosstabulation** report that shows us our resource allocations over time.

Try This Yourself:

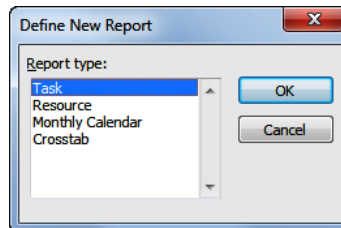
Same File

Continue using the previous file with this exercise, or open the file J420 Reports_2.mpp...

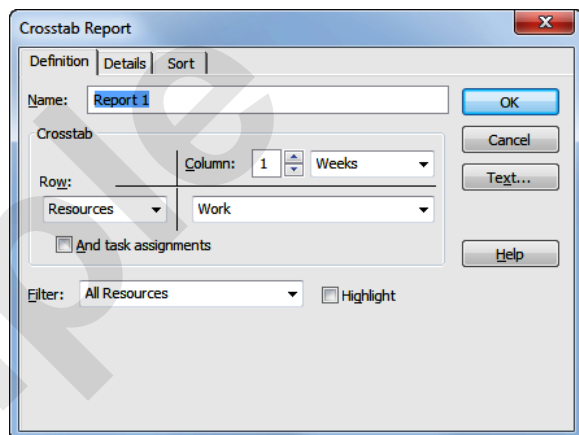
- 1 Click on the **Project** tab on the **Ribbon**, click on **Reports** in the **Reports** grouping, click on **Custom** and click on **[Select]**
- 2 Click on **[New]** to display the **Define New Report** dialog box
- 3 Click on **Crosstab** and click on **[OK]** to display the **Crosstab Report** dialog box
- 4 Type **Weekly Resource Allocation** in **Name**
- 5 Click on the drop arrow to the right of **Work** and click on **Percent Allocation**
- 6 Click on **And task assignments** until it appears ticked
- 7 Keep the **Crosstab Report** dialog box open for the next topic

This will display resources in the report and the tasks that they have been assigned to...

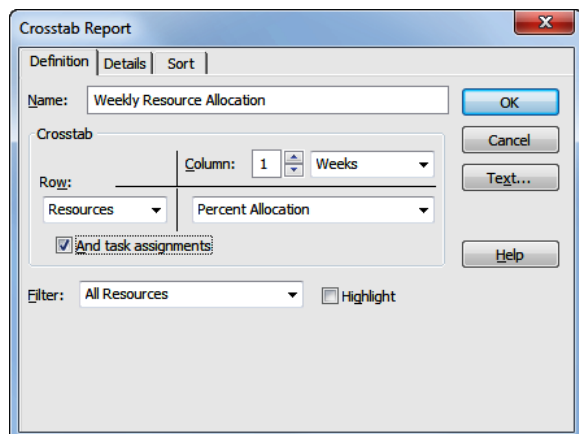
2



3



6



For Your Reference...

To create a **custom report**:

1. Click on the **Project** tab, click on **Reports**, click on **Custom** and click on **[Select]**
2. Click on **[New]**
3. Click on the type of report and click on **[OK]**

Handy to Know...

- There are **4** different report layouts that you can create as shown in the **Define New Report** dialog box: **Task**, **Resource**, **Monthly Calendar**, and **Crosstab**.

ADJUSTING THE DETAILS OF A CUSTOM REPORT

The hardest part to define when creating a custom report is the use and placement of the fields and their values. This is done on the **Define** tab of the dialog box. Once this is done

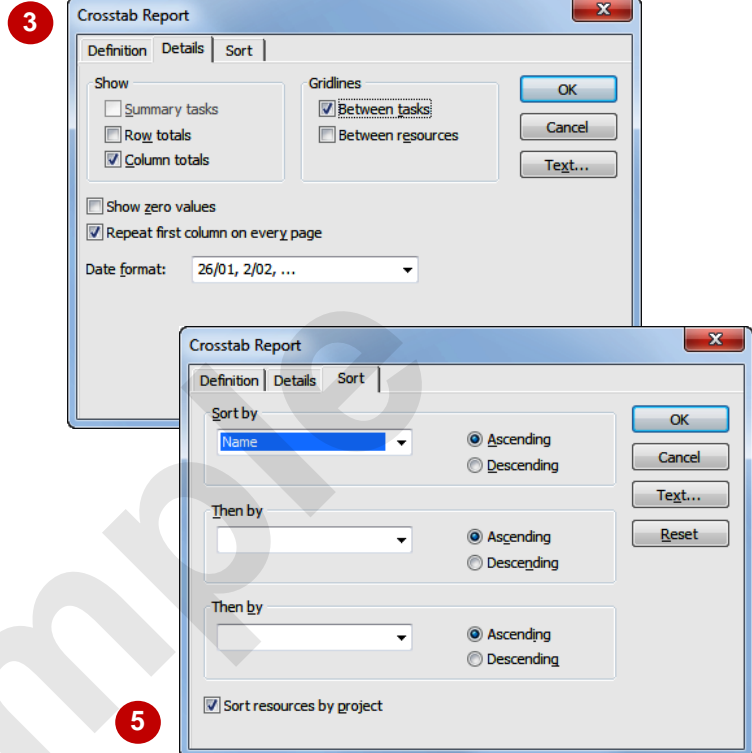
you can specify the other **Details** and also a **Sort** order if applicable. While these are not as tricky to work with they can still have quite an impact on the way your report presents its results.

Try This Yourself:

Open File

Ensure that the **Crosstab Reports** dialog box from the previous exercise is still open before starting this exercise...

- 1 Click on the **Details** tab of the **Crosstab Reports** dialog box
- 2 Click on **Custom totals** in **Show** until it appears with a tick
- 3 Click on **Between tasks** in **Gridlines** until it appears ticked
- 4 Click on the **Sort** tab
- 5 Click on the drop arrow for **Sort by** and click on **Name**
- 6 Click on [OK] to return to the **Custom Reports** dialog box where the **Weekly Resource Allocation** report should appear highlighted
- 7 Click on [Select] to see the report in preview and click on the first page
- 8 Click on the **Project** tab



Weekly Resource Allocation
The Rostadium Project
Scott Harris

	11/05	18/05	25/05	1/06	8/06	15/06	22/06
Air Compressor							
Erect seating tiers							
Erect wall							
Install roofing superstructure							
Architect	100	100	100	13			8
Create architectural plans	100	100	100				
Obtain official occupancy certificates							
Submit plans for approval				13			8
Test control room equipment							

For Your Reference...

To adjust the details of a custom report:

1. Ensure the custom report dialog box appears on the screen
2. Adjust the settings as desired in the **Details** and **Sort** tabs on the dialog box

Handy to Know...

- Your custom report will appear in alphabetical order alongside the other in-built reports in the **Custom Reports** dialog box.

SHARING CUSTOM REPORTS

Custom reports are normally only available for use in the project file in which they are created. If you want to **share** your custom report with other projects you can do so using the **Organiser** in

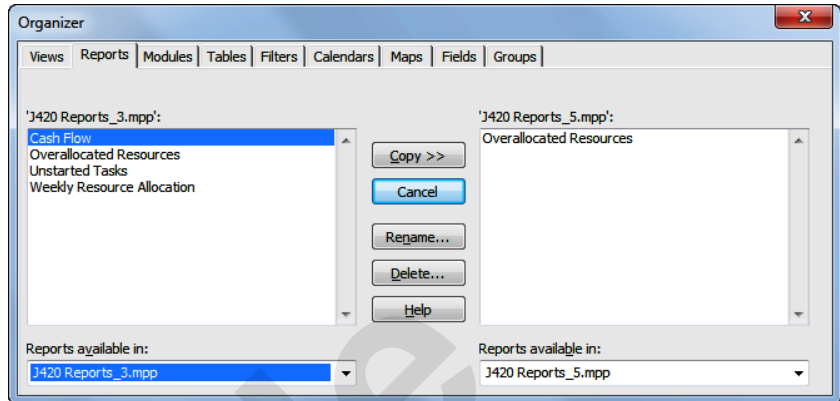
Microsoft Project. You can use the **Organiser** to copy the report to the **Global** template where it can be used by all projects, or just copy it to a specific project for use in that project only.

Try This Yourself:

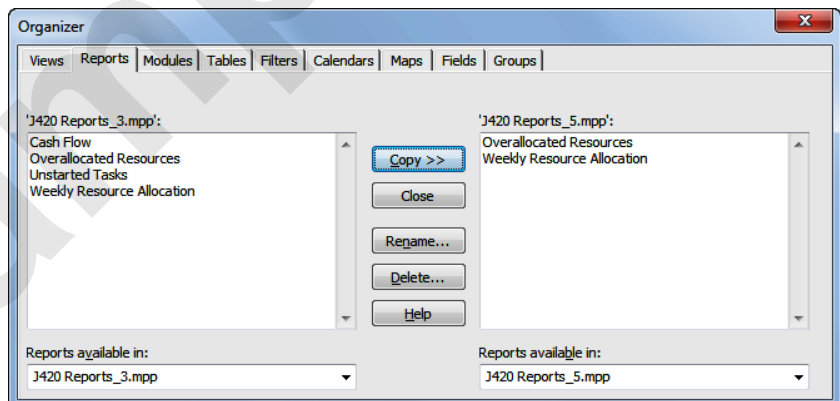
Same File

Continue using the previous file with this exercise, or open the file *J420 Reports_3.mpp...*

- 1 Use the **Open** command on the **File** tab to open the project **J420 Reports_5.mpp**
- 2 Click on the **Project** tab, click on **Reports**, click on **Custom** and click on **[Select]**
- 3 Click on **[Organiser]** to display the **Organiser** dialog box
- 4 Click on the drop arrow next to **Global.mpt** and click on **J420 Reports_3.mpp** so that both projects appear in the **Organiser**
- 5 Click on **Weekly Resource Allocation** in **J420 Reports_3** and click on **[Copy]** to copy it to the other project file
- 6 Click on **[Close]** to return to the **Custom Reports** dialog box
- 7 Click on **[Close]**
- 8 Close all open project files, saving if you wish to do so



- 3 The Reports tab has automatically appeared as selected because we have entered the **Organiser** from the **Custom Reports** dialog box.



- 5

For Your Reference...

To share custom reports:

1. Click on the **Project** tab, click on **Reports**, click on **Custom** and click on **[Select]**
2. Click on **[Organiser]**
3. Use the tools in the **Organiser** to copy the report from one file to another

Handy to Know...

- In the exercise above the **Organiser** was used to copy a custom report from the project file in which it had been created to another project file – that project file had to be open before we accessed the **Organiser**.

CHAPTER 2

TEMPLATES

InFocus

WPL_J421

Templates are designed to allow you to create new files that share common appearances and characteristics – a common project DNA! A template is basically a cloning tool that uses one file to spawn multiple copies.

In this session you will:

- ✓ gain an understanding of how templates work in **Microsoft Project**
- ✓ learn how to navigate through the available templates in **Microsoft Project**
- ✓ learn how to save an existing project file as a template
- ✓ learn how to use a custom template to create a new project file
- ✓ learn how to create a template shortcut in the **My Templates** dialog box
- ✓ learn how to manage the **My Templates** window
- ✓ learn how to open a template for editing
- ✓ gain an understanding of the **Global** template
- ✓ learn how to copy elements into the **Global** template using the **Organiser**
- ✓ learn how to apply an item from the **Global** template to a project
- ✓ learn how to delete an item from the **Global** template.

UNDERSTANDING TEMPLATES

Every project file that you create in Microsoft Project is based upon a **template** – a template is simply a cloning file that is used to create copies of itself. **Templates** can be bland, such as the

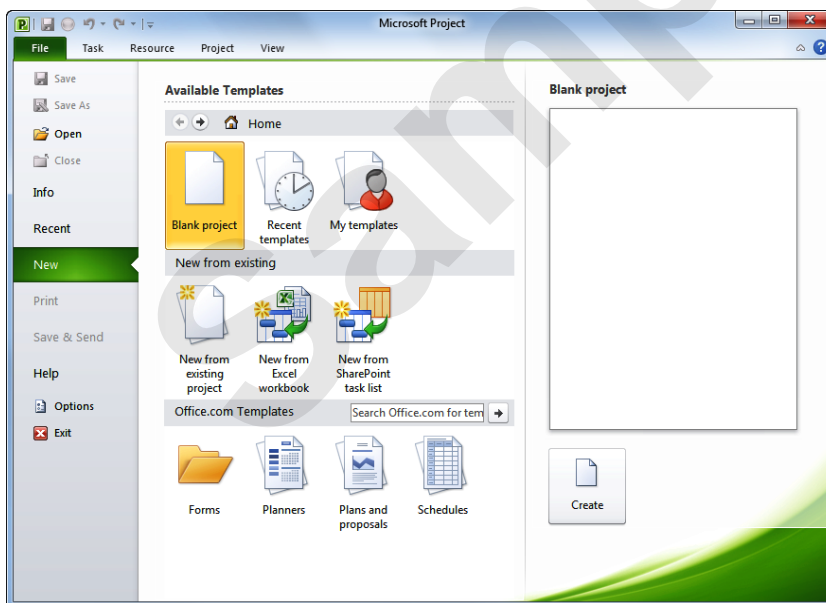
blank template which is commonly used to create new project files, or quite sophisticated such as the ones you can download from **Office.com** on the Web.

Your Choice of Templates

When you use the **New** command on the **Backstage** (which is accessed from the **File** tab on the **Ribbon**) you are presented with several options for creating your new project. You can, for example, create your project:

- using the standard **Blank project** template
- using templates you've accessed recently
- using templates placed in a special folder on your computer and referenced as **My templates**
- using existing **Microsoft Project** or **Microsoft Excel** files
- using **SharePoint** task lists
- using templates that have been uploaded by Microsoft and also other project users to **Office.com**

Unlike previous versions of Microsoft Project, **Project 2010** ships with very few built in or supplied templates of its own. Instead **Microsoft** now want you to download files if you want to use existing templates.



Understanding What “My Templates” Is Really All About

The majority of project users will create their new projects using the **Blank project** template – it's a clean, no-fuss way of starting a fresh project.

However, if you are creating similar projects over and over again you can actually save one as a **template** and then use it to create future ones. This is great because you can add your corporate branding, and standard tasks and/or resources, without having to do this over and over again.

When you save a file as a template it will save it to where Microsoft thinks is the storage place for all **Office 2010** templates – unless this has been changed this folder will be:

C:\Users<User Name>\AppData\Roaming\Microsoft\Templates

You can then access this template again through the My templates setting in **Available Templates** on the **Backstage** as shown above.