

Visual Reports in Project Professional 2007

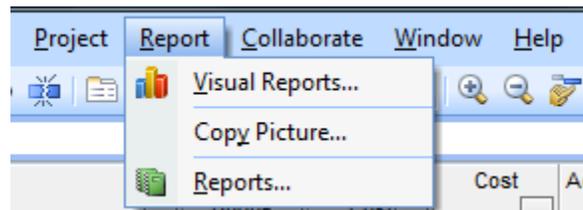
Summary:

In Project Professional 2007, users can create reports for a specific project more easily and with more information than ever before. Visual reports can be exported to Visio 2007 or Excel 2007. The information that is exported to Excel is automatically placed into PivotTables and PivotCharts that can be modified in Excel after the report is run. This feature allows for customized reports, report templates, charts, graphs and diagrams and also makes the reports more useable for other programs.

Visual reports are intended to provide easy to use and easy to visualize reports to give a deeper understanding of the status of a project's resources, costs and schedules. They are designed to give detailed information about a single schedule. There is also the option to save the data from a schedule for multi-purpose reasons.

How to use Visual Reports

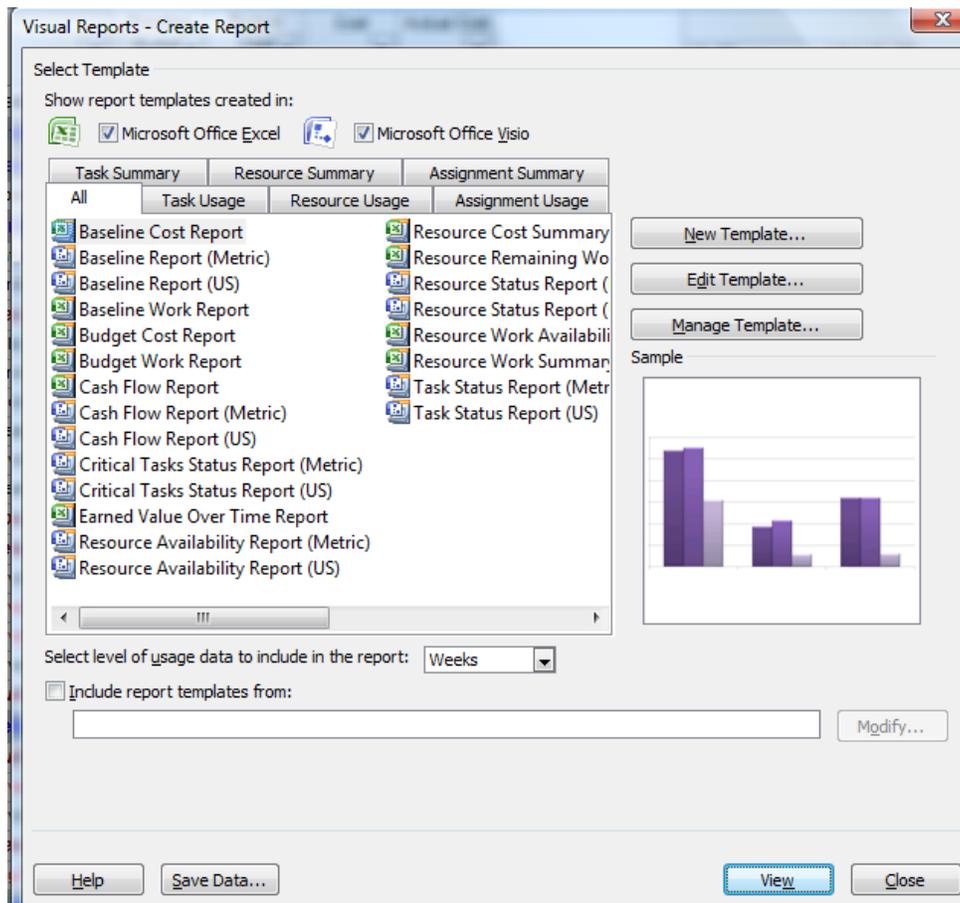
In Project Professional, in the drop-down menu list is the Report option. Select Visual Reports from that menu.



After opening Visual Reports the dialog box appears which has tabs for different specific types of reports.

- In the screenshot shown below, the “All” tab is selected.
- The default setting for the checkboxes at the top of the screen is to show all of the reports that are available for both Excel and Visio. If you don't have both programs on your computer, you can unselect one of those checkboxes.
- In the middle section of the box is the listing of available reports.
- Below the report list is an option to set the date range type for the report that you choose – it is the drop down titled “Select level of usage data...”. By selecting a different time frame, the report will provide a different level of data.

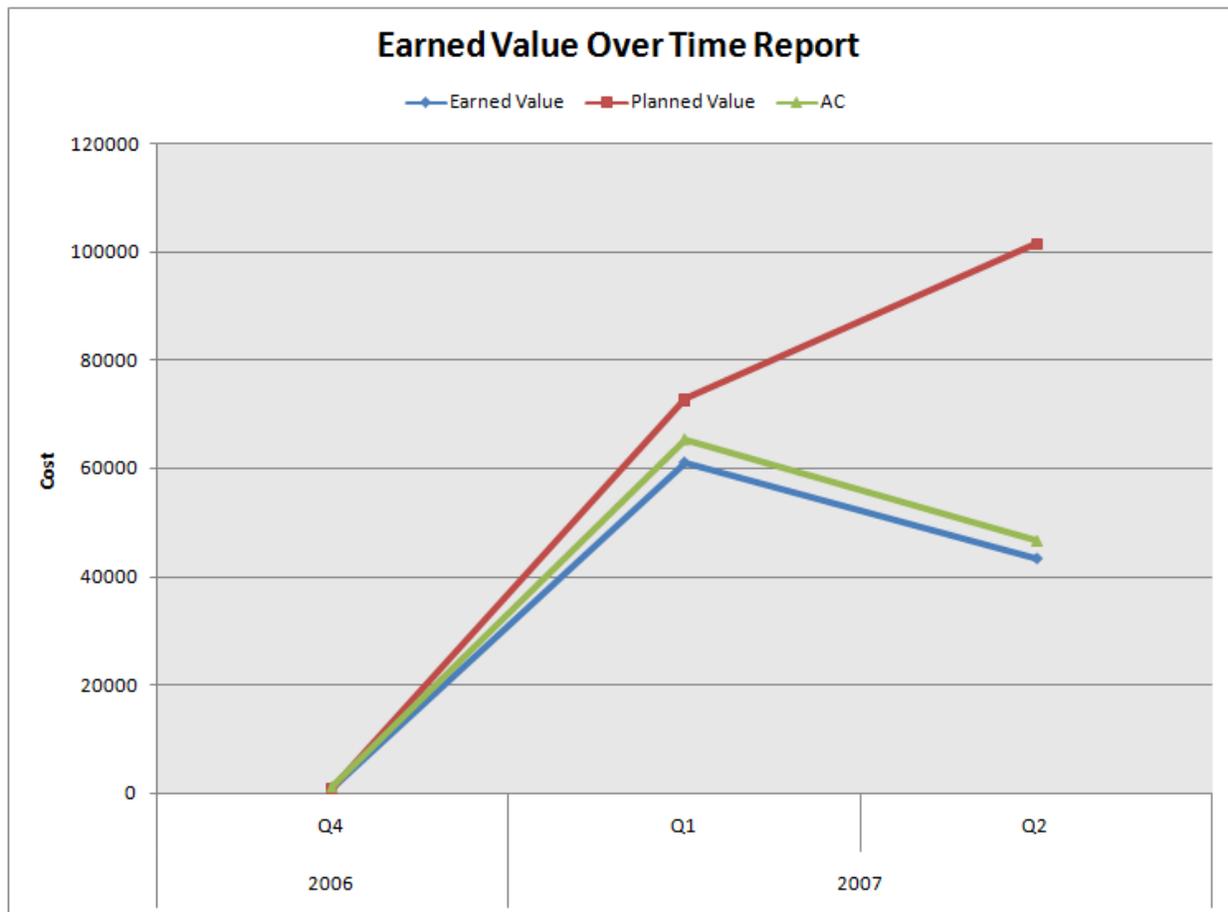
- If you have another set of templates that you use then select the “Include report templates from:” and then select the set of templates that you have elsewhere.
- On the right hand side of the pop up box are three buttons:
 - New Template – used to create a new report
 - Edit Template – used to modify an existing report
 - Manage Template – used to open a file folder location where templates reside
- The Save Data button will be discussed in more detail later



To run an existing report, click on the report name from the list and then click on view. Depending on the type of report you select, Excel or Vision will open. For the following example, the report Earned Value Over Time was selected – which uses Excel.

Excel Reports

While this document is not an attempt to explain how to use PivotTables or Excel chart functionality a few possible options are discussed here to demonstrate some of the available functions. Also, for purposes of this document, a sample schedule is being used so do not be concerned with the data of this specific schedule. When the default version of the Earned Value Over Time report opens it will display the first of two tabs – the chart. This is how that initially appears:



If the user right clicks on the graph (or uses Excel toolbars for charts) the pivot table information and the chart information will display. The chart type can be changed at will by selecting “Change Chart Type”. It is recommended that the user does not change the pivot table information in this screen unless the user fully understands how the pivot table data affects the chart directly. For purposes of this example, the chart type has not been changed.

The best method to modify the data is to open the second tab of the Excel sheet – the one that contains the pivot table data that creates the chart. The default for this example looks like this in the pivot table:

Year	Quarter	Earned Value	Planned Value	AC
2006	Q4	1145.810329	1015.384615	1365.041098
2006 Total		1145.810329	1015.384615	1365.041098
2007	Q1	61261.46714	72800	65507.5729
	Q2	43546.22597	101538.4615	46730.76923
2007 Total		104807.6931	174338.4615	112238.3421
Grand Total		105953.5034	175353.8462	113603.3832

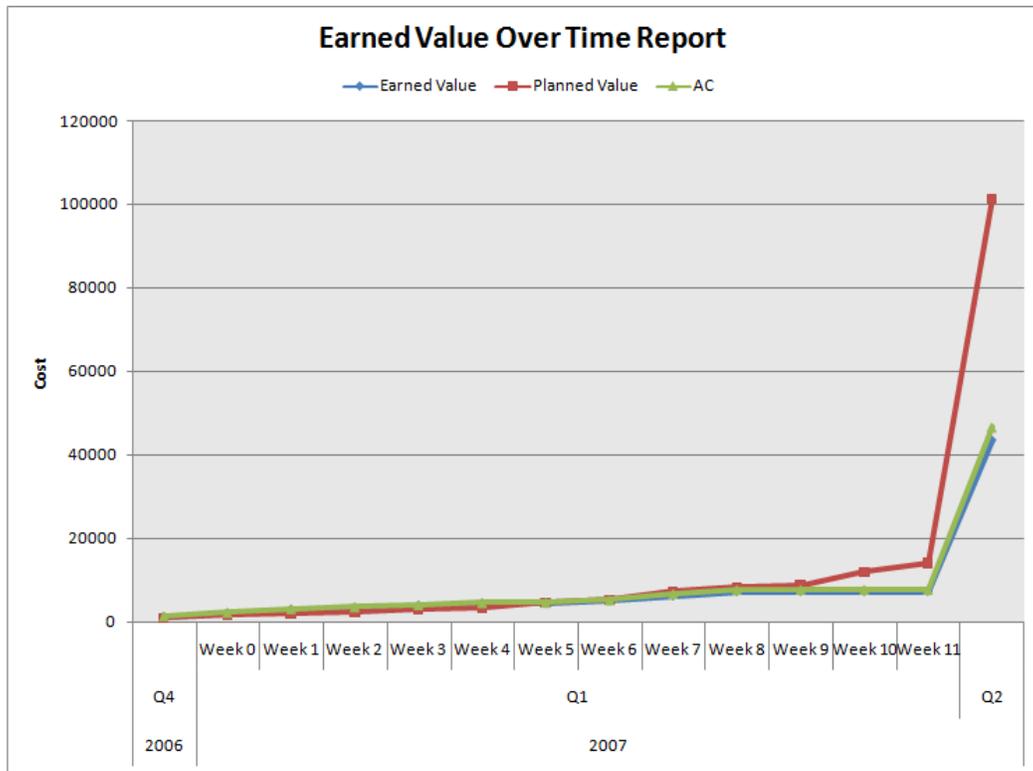
Area	Field
Report Filter	Tasks
Column Labels	Σ Values
Row Labels	Time Weekly ...
Values	Earned Value
Values	Planned Value
Values	AC

Again, this document is not an attempt to explain how to use pivot tables. However, it is important to note that as data is changed in the pivot table, the chart is automatically modified. For simplicity of this demonstration, the only modification to the data is to expand the 2007, Q1 field so that it now looks like this in the pivot table:



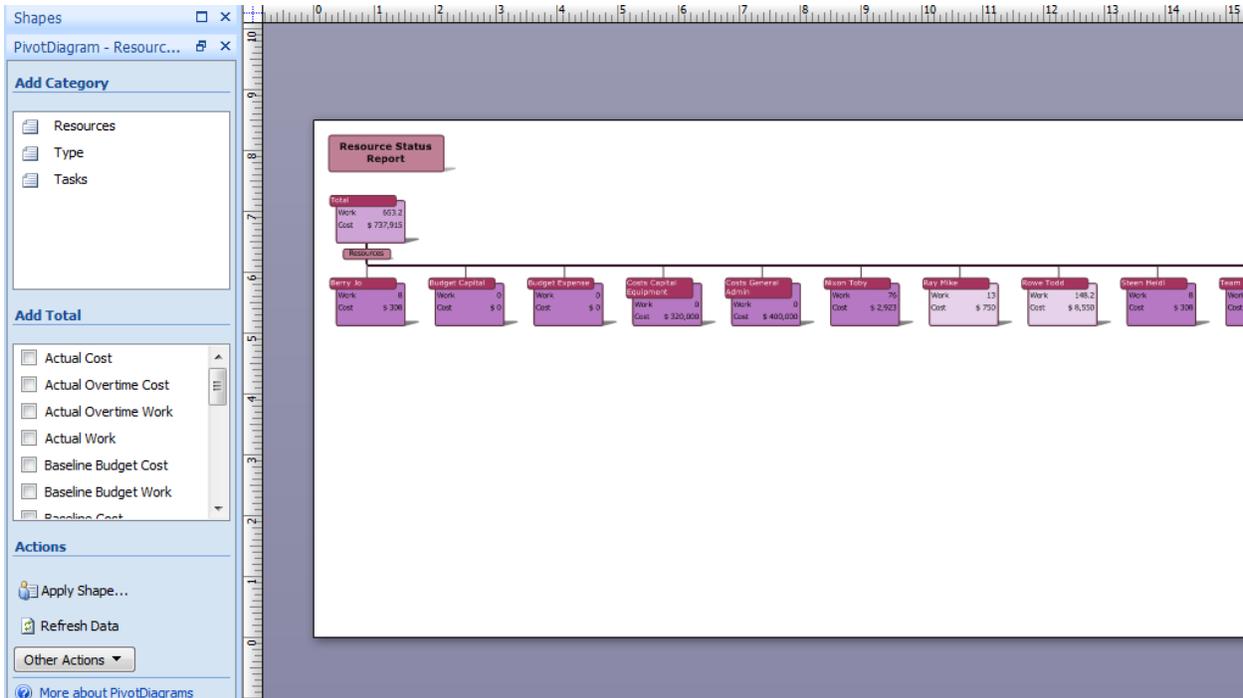
1	Tasks	All				
2						
3				Data		
4	Year	Quarter	Week	Earned Value	Planned Value	AC
5	2006	Q4		1145.810329	1015.384615	1365.041098
6	2006 Total			1145.810329	1015.384615	1365.041098
7	2007	Q1	Week 0	2014.03455	1523.076923	2244.803781
8			Week 1	2893.281957	1984.615385	3124.051188
9			Week 2	3345.033276	2446.153846	3575.802506
10			Week 3	3854.476902	2907.692308	4085.246132
11			Week 4	4384.615385	3369.230769	4615.384615
12			Week 5	4450.458989	4584.615385	4681.22822
13			Week 6	5046.441076	5369.230769	5277.210307
14			Week 7	6242.307692	7246.153846	6750
15			Week 8	7257.704328	8307.692308	7788.461538
16			Week 9	7257.704328	8815.384615	7788.461538
17			Week 10	7257.704328	12046.15385	7788.461538
18			Week 11	7257.704328	14200	7788.461538
19		Q1 Total		61261.46714	72800	65507.5729
20		Q2		43546.22597	101538.4615	46730.76923
21	2007 Total			104807.6931	174338.4615	112238.3421
22	Grand Total			105953.5034	175353.8462	113603.3832
23						

As this change has been made, the chart immediately is modified as well. Going back to the chart tab shows that it now looks like this (showing the weeks selected in the pivot table):

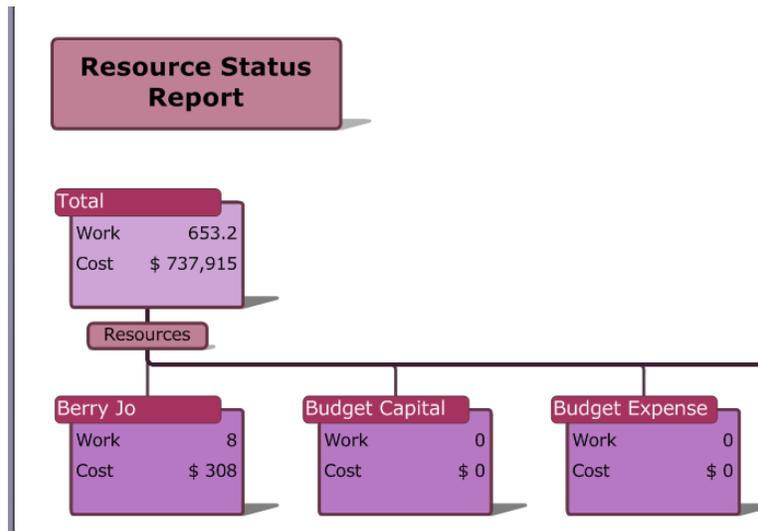


Visio Reports

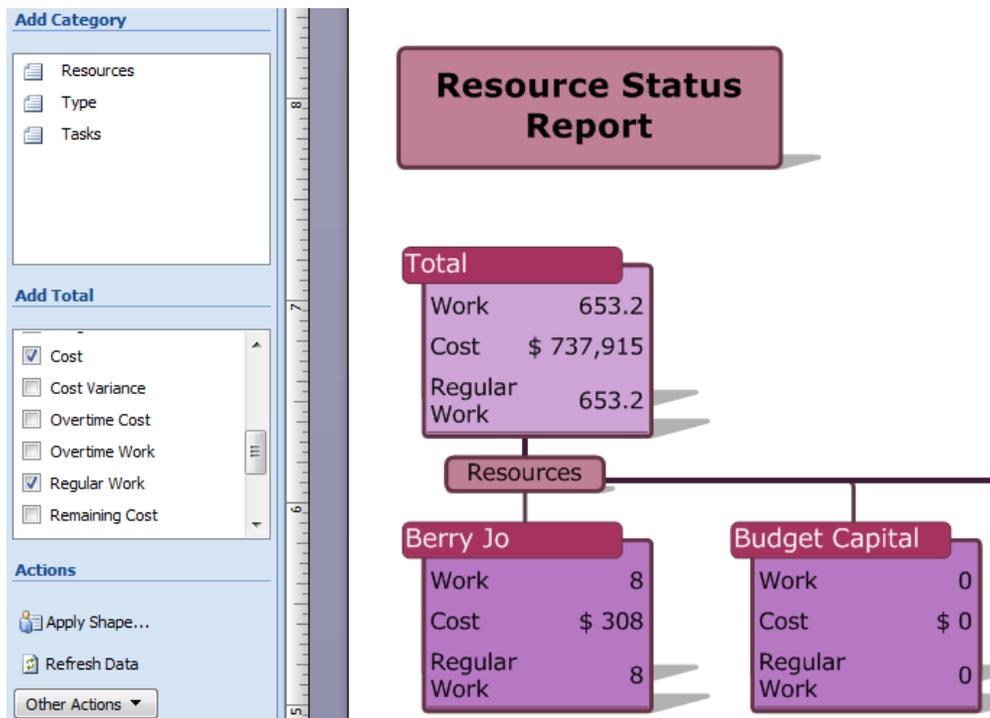
For the second example, a Visio report will be used. As with Excel, this document is not meant to describe how to use Visio itself but is meant to show some basic functionality that affects the output of the report being run. In this example, the Resource Status Report is being used. When Visio opens, the report displays with the default fields and view like this:



For demonstrative purposes, the first few boxes of this report are used.



To immediately change the data being displayed in the boxes, select the field in the “Add Total” column on the left hand side of the screen. In this example, the field Regular Work was selected:



Add Category

- Resources
- Type
- Tasks

Add Total

- Cost
- Cost Variance
- Overtime Cost
- Overtime Work
- Regular Work
- Remaining Cost

Actions

- Apply Shape...
- Refresh Data
- Other Actions ▾

Resource Status Report

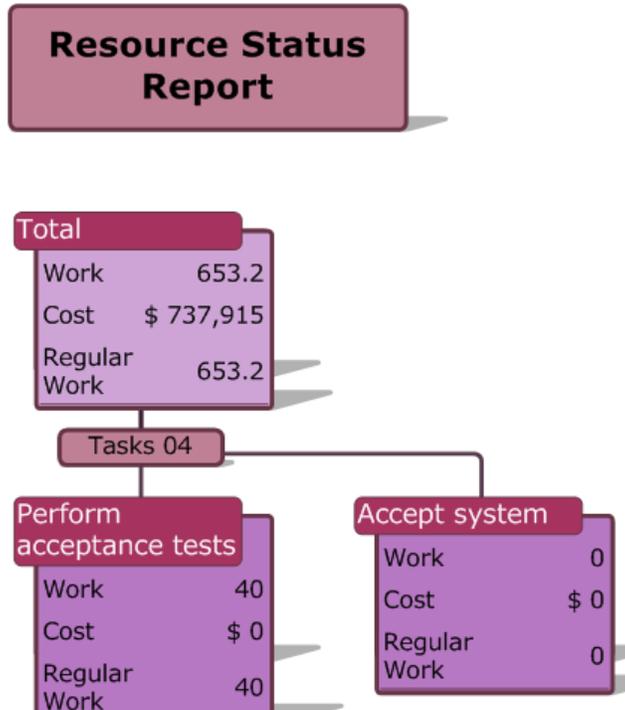
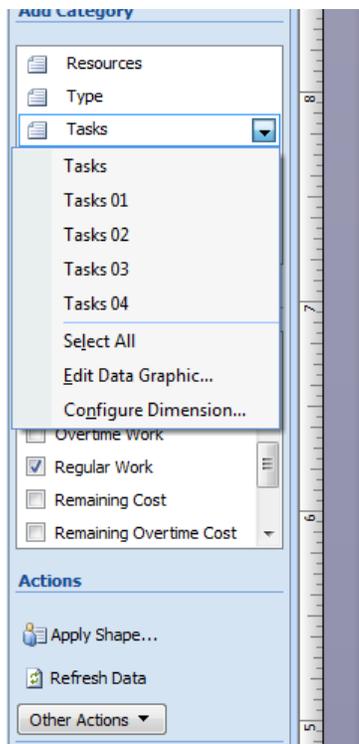
Total

Work	653.2
Cost	\$ 737,915
Regular Work	653.2

Resources

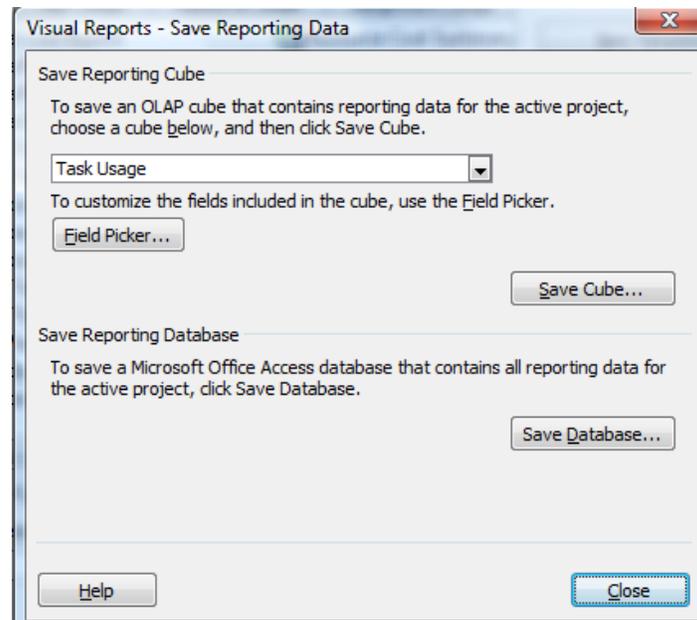
Resource	Work	Cost	Regular Work
Berry Jo	8	\$ 308	8
Budget Capital	0	\$ 0	0

To change the information being displayed, select a Category from the left hand side of the screen. Only options that are available will be shown. In this example, there are no options for the Resources or the Types but the level of Task can be selected. For this screenshot, the category of Task was modified to show only level 4 tasks and this made the data change immediately.



Save Data Option

On the popup box that opens when the user selects Visual Reports is the button titled “Save Data”. To use this data, the user must have Access or the ability to send the database to a computer that has Access. This button saves the data itself from a cube specifically for this schedule. After clicking on the button, another dialog box opens that allows the user to save the type of data, pick specific fields and then save the information.



After selecting the fields and type of data, clicking on the Save Cube button will save the data in a cube format. The more common method is to use the Save Database button which should default to having the Microsoft Access Database type. After successfully saving the database, close the dialog box. The user can then open the file with Access and the data will be displayed in tables and will be used in whatever manner is needed by the user. An example screenshot of Access is shown here:



RESERVED_ID	PROJ_ID	Assignment	Actual Cost	Actual Finis	Actual Over	Actual Over1	Actual Start
0		0					
0		1	5365.38		0		007 8:00:00 AM
0		2	403.84615385	007 5:00:00 PM	0		007 8:00:00 AM
0		3	230.77	007 5:00:00 PM	0		007 8:00:00 AM
0		4	288.46153846	007 5:00:00 PM	0		007 8:00:00 AM
0		5	0	07 10:00:00 AM	0		007 8:00:00 AM
0		6	0		0		0
0		7	0		0		0
0		8	0		0		0
0		9	0		0		0
0		10	0		0		0
0		11	0		0		0
0		12	0		0		0
0		13	0		0		0
0		14	461.53846154	07 12:00:00 PM	0		007 1:00:00 PM
0		15	0		0		0
0		16	346.15		0		007 1:00:00 PM
0		17	0		0		0
0		18	115.38		0		007 1:00:00 PM
0		19	0		0		0
0		20	576.92307692	07 12:00:00 PM	0		007 1:00:00 PM
0		21	0		0		0
0		22	0		0		0
0		23	0		0		0