

*An eBook for the Users of Standalone Desktop
Application Editions/Versions*

A Guide to Tabular Reporting

Text Reporting in

Microsoft® Office Project

For Versions 2010 and Later

- ☞ Learn How to Create Tabular Reports in All Versions*
- ☞ Master your Skills on Developing Tabular Reports that Help Understand and Interpret Project Data*
- ☞ Add Reports Developed to your Report Toolbox*

Ismet Kocaman

A Guide to Tabular Reporting

TEXT REPORTING in Microsoft[®] Office Project

For Users of Standalone Desktop Application
Editions/Versions 2010 and Later

Ismet Kocaman

© **Ismet Kocaman**

Notice of Rights

All rights reserved. No part of this eBook may be reproduced, stored in a retrieval system or transmitted in any form or by any means, without the prior written permission of the author.

Notice of Liability

Every effort has been made to ensure the accuracy of the information herein. However, the information contained in this eBook is provided without warranty, either expressed or implied. The author will not be held liable for any damages to be caused either directly or indirectly by the instructions contained in this eBook, or by the application software described herein. The author provides formula examples for demonstration only, without warranty either expressed or implied.

Trademark Notice

Microsoft is a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries. All other trademarks mentioned herein are the property of their respective owners. The author has no affiliation with Microsoft Corporation. Screen captures were reprinted with authorization from Microsoft Corporation. This document is not a product of Microsoft Corporation.

About the Author

Ismet Kocaman is a Management Consultant, Project Management Consultant, Technical Project Manager and a Mechanical Engineer with over 20 years of experience in the manufacturing sector.

He is currently providing management consultancy to the companies in the manufacturing sector on system improvement projects and technical projects. He also conducts training seminars for engineers on Project Management and MS Project with focus on the project management process in the manufacturing environment.

He is a Project Management Professional (PMP) and holds several Microsoft® certifications on MS Project.

Visit the author's website for more information at <http://www.ismetkocaman.com>

CONTENTS

- INTRODUCTION 5
- BUILT-IN TEXT REPORTS 9
 - ACCESSING THE REPORTS 10
 - The Reports Dialog Box 10
 - The Custom Reports Dialog Box 14
 - Defining New Custom Text Reports – the New button 14
 - Customizing the Text Reports – the Edit and Copy buttons 16
 - The Organizer Dialog Box – the Reports Tab 17
 - EXPLORING THE REPORTS 21
 - How the Built-in Text Reports Were Defined 21
 - Text Report Info Sheet: Task Table Reports 22
 - Text Report Info Sheet: Resource Table Reports 23
 - Text Report Info Sheet: Task Crosstab Reports 24
 - Text Report Info Sheet: Resource Crosstab Reports 25
 - Customizing the Appearance of a Text Report 26
 - Sorting the Project Data in Text Reports 32
 - Default Sort Settings in New Reports 32
 - How Sorting by Multiple Criteria Works 32
 - How Built-in Text Reports Sort the Project Data 35
 - About the message “There is no data for you to print” in a Preview 39
 - Setting the Period in Table and Crosstab Reports 42
 - Previewing and Printing Text Reports and Views 46
 - The Print tab in the Backstage View 46
 - Arranging the Columns in Views and Text Reports for Previewing 47
 - Settings Section of the Print tab 48
 - The Page Setup Dialog Box 50

CONTENTS

Using Controls at the bottom-right corner of the Preview Pane	51
How to Include Row and Column Totals in Preview of a Usage View	51
TEXT REPORTING IN MS PROJECT	55
TEXT REPORTING IN ALL VERSIONS	56
Listing Notes and Objects in Reports.....	57
Listing Notes and Objects in Text Reports	61
How to Reference/Include Notes and Objects in Graphical Reports	68
Printing Notes in All Versions	72
Listing Predecessors and Successors in Reports	76
Listing Predecessors and Successors in Text Reports	79
Listing Predecessors and Successors in Later Versions	81
Creating a Project Summary Report by using Custom Field Formulas.....	88
Creating the Report Header	89
Creating the sections Dates, Duration, Work and Costs	92
Developing the Task Status Section	93
Developing the Resource Status Section.....	101
Adding the Notes section.....	106
Viewing and Sharing the Report.....	107
Reports that Show Calendars and Calendar Views.....	113
Text Reports: Listing Calendars and Cost Rates of Resources.....	113
Text Reports: Listing Base Calendars	116
Text Reports: Monthly Calendar Report.....	117
Calendar View that Lists Milestones.....	124
Calendar View that Shows Working/Nonworking Days of a Resource.....	128
Reporting Schedule, Cost and Work Data of Assignments	139
Task Reports that Show Schedule, Cost and Work Data of Resource Assignments.....	139
Customizing Task Usage View to Produce Task Reports	141
The Tasks Starting Soon Report	141
The Unstarted Tasks Report	148
The Tasks In Progress Report	150
Resource Reports that Show Schedule, Cost and Work Data of Task Assignments.....	155

CONTENTS

Customizing Resource Usage View to Produce Resource Reports	156
The Overall Allocated Resources Report.....	157
The Who Does What Report	160
Reports that Show Column Totals for Cost and Work Data	162
The Budget Report in All Versions.....	162
Customizing Task Usage View to Produce Budget Report	163
Creating a Budget Report in a Graphical Report Page.....	165
Customizing Task Usage View to Produce the Reports EV and Overbudget Tasks.....	167
Customizing Resource Usage View to Produce the Overbudget Resources Report	168
Managing Display of Summary Rows in Text Reports and Views.....	169
The Settings Show summary tasks and Show totals in Task Table Reports.....	177
Reports Listing Timephased Project Data	182
Text Reports: Using Built-in Resource Crosstab Reports.....	183
Displaying Task- or Resource-Timephased Data in a Graphical Report	186
Resource Reports that Display Timephased Data for a Date Range	191
Text Reports: How to Produce a “Who Does What When” Report for a Date Range	196
Text Reports: How to Produce a “Who Does What When” Report for a Resource	203
Customizing Resource Usage View to Produce Crosstab Report for a Date Range.....	204
Text Reports: Using Built-in Task Crosstab Reports.....	211
Customizing Task Usage View for Crosstab Reporting	215
Task Reports that Display Timephased Data for a Date Range	216
Text Reports: Task Crosstab Reporting for a Date Range	216
Customizing Task Usage View to Produce Crosstab Report for a Date Range.....	219
OTHER METHODS	223
USING VBA FOR TEXT REPORTING.....	224
Producing a Graphical Report that Shows Task/Resource and Assignment Notes.....	224
Listing Cost Rate Tables for Resources in a Graphical Report	235
Producing a Graphical Report that Shows Details of the Calendars	246
EXPORTING PROJECT DATA TO MS EXCEL	269
Exporting Non-Timephased Data: Using Field Mapping	269
Creating a Who Does What Report in MS Excel.....	269

CONTENTS

Exporting Task and Resource Data	269
Exporting Assignment Data	274
Creating a PivotTable from Exported Data	276
Sorting and Subtotaling Exported Data	279
Processing Project Data Exported As Text in MS Excel.....	279
Copy/Pasting Data from MS Project to MS Excel.....	281
Using Predefined Export Maps.....	281
Exporting Timephased Data: Using Visual Reports	285
Exporting Timephased Data to a Workbook: Creating a New Visual Report Template	287
Exporting Timephased Data to a Workbook	291
Creating an OLAP Cube Manually	291
Creating a PivotTable from an OLAP Cube	292
Customizing PivotTables to Produce Task and Resource Crosstab Reports	293
Saving the New Workbook as a Custom Report Template	300
Saving the New Workbook as a Report Workbook	301
Using the Report Template to Create a New Report	302
Editing a Custom Report Template	306
Applying a Date Range to a PivotTable.....	312
Creating a Task Crosstab PivotTable: A Cash Flow Report that Shows Cost Values in Multiple Currencies for a Date Range	325
Creating a Resource Crosstab PivotTable: Percent Allocation Report for Work Resources	343
REPORT INDEX.....	351

INTRODUCTION

SAMPLE

INTRODUCTION

The purpose of this eBook is to provide in-depth information on the text reports to the users, who currently run MS Project 2010, and therefore, who want to gain a good understanding of this feature, and at the same time, is to help the users of the text reports, who are currently considering or already planning/undergoing a transition to a later version of the product supporting the graphical reports feature. The users of MS Project 2007 (and even earlier) may also benefit from the content presented here. The title has been deliberately selected to be "Text Reporting" instead of a title such as "Tabular Reporting" in order to grab all these users' attention.

Reporting capabilities of MS Project's standalone desktop versions/editions have been greatly improved by the introduction of the graphical reports, starting from MS Project Standard/Professional 2013. The text reports feature supported by the earlier versions was discontinued by the introduction of this new reporting tool. Thus, MS Project 2010 is the last version of the product that includes the text reports.

MS Project 2010's desktop editions, both Standard and Professional, contain many text reports in various categories that are ready to use right out of the box; see the Global.mpt's pane in the **Reports** tab of the **Organizer** dialog box for a complete list of the text reports (or templates) that were pre-installed (i.e., built-in) to the product. In case you cannot find the exact report that you want, you can customize any of these built-in text reports to your reporting needs, or otherwise create your own custom text report from scratch by utilizing capabilities of the text reports feature.

MS Project 2010's text reports can be easily printed out to text paper for hardcopy distribution, as the name of the feature implies, or to a pdf-formatted document for electronic distribution, if one of the widely available pdf printer applications has already been installed to the computer. If we are to focus on the reporting format rather than the format of the report data (or the output medium), the text reports present the project data in tabular format and they do not contain any graphical elements such as charts and graphs.

Users who have decided to keep MS Project 2010 on their computers while installing a later desktop version such as MS Project 2013 or MS Project 2016, may continue to generate text reports since MS Project allows you to install and run different desktop versions of the product side-by-side on the same computer, as long as the installation order is from the earliest version to the latest one. You can run only a version of the product at a time and the one installed last is the default application associated with the mpp files. Also note that MS Project 2010, MS Project 2013 and MS Project 2016, all

INTRODUCTION

share the same file format, which means that MS Project 2010 can directly open any project plan file created in one of these later versions without applying an explicit file format conversion to the file. As you may have already noticed, the dropdown list of the **Save as type** box in the **Save As** dialog box does not contain any item to select for MS Project 2010 in later versions. Thus, the file format compatibility among the versions in a side-by-side implementation enables you to easily generate text reports on a project plan created by using a later version of the product. Note that although MS Project 2019 cannot be installed side by side with MS Project 2016 on the same computer, all three earlier versions of the product (i.e., MS Project 2010, MS Project 2013 and MS Project 2016) can still open a project plan created in MS Project 2019 installed on a different computer.

NOTE | For detailed information on using different MS Project versions, refer to the following articles that can be found on the product website: “File formats supported by Project desktop” and “Supported scenarios for installing different versions of Office, Project, and Visio on the same computer” ■

Although both the visual and the graphical reports are mainly created to display various project data in graphical format, they may also contain elements that show the project data in tabular format on the same report page depending on the purpose of the report. As a matter of fact, you can create reports composed of tabular elements only, such as a visual report which includes a pivot table similar to a crosstab report or a graphical report which contains the same task or resource table that a text report is based on. Thus, the users that have already replaced MS Project 2010 with a later version of the product on their computers may create either a visual or a graphical report that delivers the same or similar tabular content as a text report they used to generate in the earlier versions. But on the other hand, most of the time, that won't be necessary since printing a customized view containing the same data as the text report of an earlier version, may produce the report content needed, after having also applied the text report's filter and sort settings to the view. As topics on how to use the built-in visual and graphical reports are out of the scope of this eBook, the examples of such reports are provided here in the demonstrations, along with sufficient details on how to produce them. Therefore, users of the product versions that support these features would probably experience no difficulty in creating the same reports on their computer systems if they want to add them to their custom report set. These reports can be customized further in order to use them while text reporting (i.e., tabular reporting) on any project that takes place in a real world project environment.

INTRODUCTION

Finally, although the later versions of the product no longer support the text reports feature, the tabular reporting, that is, processing and then presenting project data in flat or crosstab tables, is an important part of project reporting, and therefore, users of all stand-alone desktop versions/editions may find this eBook useful as a reference on reporting the project data in tabular format, without leaving the application, by making use of the features that MS Project offers.

This eBook assumes that you are currently using MS Project in planning and managing projects and you are already familiar with views, tables, filters, groups and sorting as well as all the reporting features available in the desktop version/edition of the product used. It is also assumed that you are familiar with handling the custom fields with formulas in MS Project and working with the PivotTables in MS Excel ■

NOTE | The examples in this eBook were developed and tested by using the following standalone desktop products; MS Project 2010 (Service Pack 2, MSI) and MS Project 2019 (Version 2107, C2R).

In this eBook, automatically scheduled tasks will be used in all examples, unless stated otherwise.

A template from MS Project 2007, ISO 9001 Management Review.mpt, will be used in some demonstrations ■

About the Author

Visit the author's website at www.ismetkocaman.com

Notice of Rights

All rights reserved. No part of this eBook may be reproduced, stored in a retrieval system or transmitted in any form or by any means, without the prior written permission of the author.

Notice of Liability

Every effort has been made to ensure the accuracy of the information herein. However, the information contained in this eBook is provided without warranty, either expressed or implied. The author will not be held liable for any damages to be caused either directly or indirectly by the instructions contained in this eBook, or by the application software described herein. The author provides formula examples for demonstration only, without warranty either expressed or implied.

Trademark Notice

Microsoft is a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries. All other trademarks mentioned herein are the property of their respective owners. The author has no affiliation with Microsoft Corporation. Screen captures were reprinted with authorization from Microsoft Corporation. This document is not a product of Microsoft Corporation.

Copyright © Ismet Kocaman

eBook's website: www.ismetkocaman.com/Formulas/eBook3.html