

*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

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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

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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.

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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 ■

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