

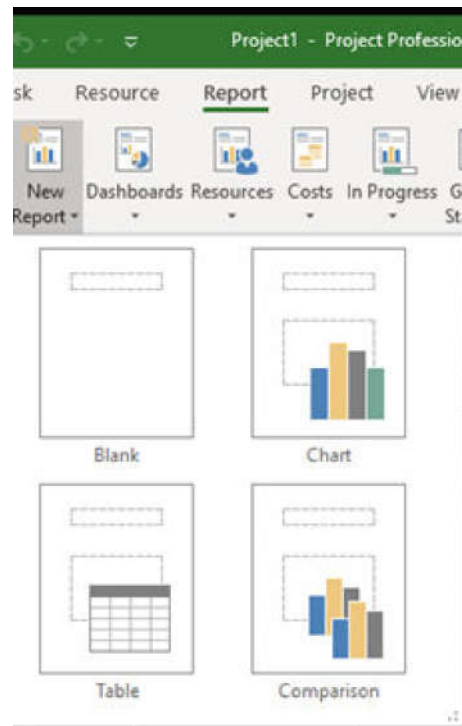
# TOPIC B

## Create Custom Reports

Although Project provides many useful reports that are ready for you to use, there may be situations where you need to create a custom report to meet your specific project needs. In this topic, you will create and customize new reports.

### The New Report Command

You can start creating a new report by selecting the **New Report** command from the **View Reports** group. Selecting this button will display four report options.



*Figure 3-7: Create a custom report with the New Report command.*

### New Report Types

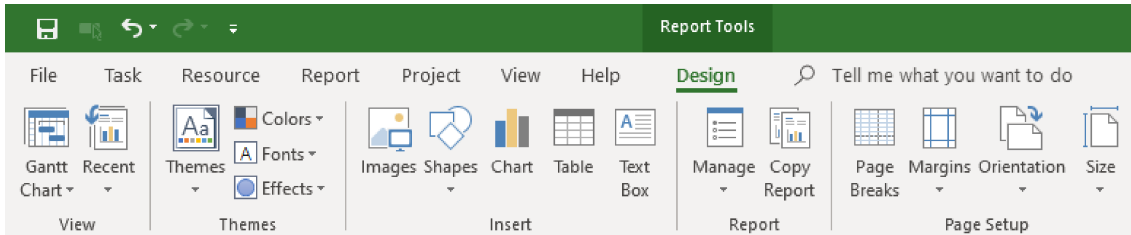
There are four types of new reports available. You can customize each of these new report formats to meet your needs.

<b>Report</b>	<b>Description</b>	<b>Use</b>
<b>Blank Report</b>	Generates a report that is empty except for the report title.	To create a report from scratch.
<b>Chart</b>	Generates a report that contains a report title and a single chart.	To show project information graphically.
<b>Table</b>	Generates a report that contains a report title and a single table.	To show project information in a tabular format.

<i>Report</i>	<i>Description</i>	<i>Use</i>
<b>Comparison</b>	Generates a report that contains a report title and two side-by-side charts.	To graphically compare two sets of project information.

## The Report Tools Design Contextual Tab

Whenever you generate a new report, the **Report Tools Design** contextual tab will appear on the ribbon. You can use the commands on this tab to change the overall look of the report.



**Figure 3–8: Create report elements using the Report Tools Design contextual tab.**

The following table lists the commands on the **Report Tools Design** contextual tab and indicates what they do.

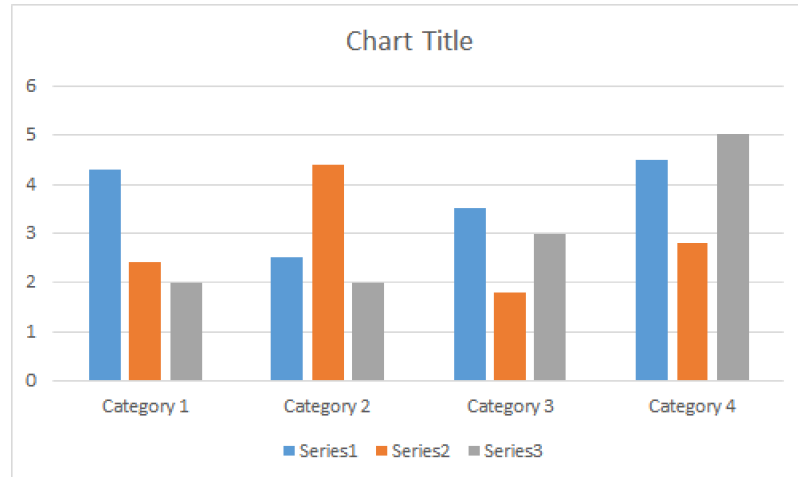
<i>Command</i>	<i>Description</i>
<b>Themes</b>	Changes the graphic theme for the report. You can choose from over 20 themes.
<b>Colors</b>	Changes the color palette of the report. You can choose from over 20 color palettes or create a custom palette.
<b>Fonts</b>	Changes the font combinations used in the report. You can choose from over 20 font combinations or create your own.
<b>Effects</b>	Applies 3D effects to objects in the report.
<b>Images</b>	Inserts photos or graphics (such as your company logo) into the report.
<b>Shapes</b>	Inserts geometric shapes into the report.
<b>Chart</b>	Inserts a chart into the report.
<b>Table</b>	Inserts a table into the report.
<b>Text Box</b>	Inserts a text box into the report.
<b>Manage</b>	Enables you to rename the report. Also allows you to organize reports. Selecting the <b>Organizer</b> option will open the <b>Organizer</b> dialog box to the <b>Reports</b> tab. The <b>Reports</b> tab works exactly like the <b>Views</b> tab you learned about earlier in this course.
<b>Copy Report</b>	Copies the report to your Windows clipboard so that you can paste it into another document.
<b>Page Breaks</b>	Allows you to see where the report will break when it is printed.
<b>Margins</b>	Allows you to set the margins for the printed report.
<b>Orientation</b>	Allows you to print the report in either <b>Portrait</b> or <b>Landscape</b> mode.
<b>Size</b>	Allows you to specify a page size for the printed report.

## Chart Types

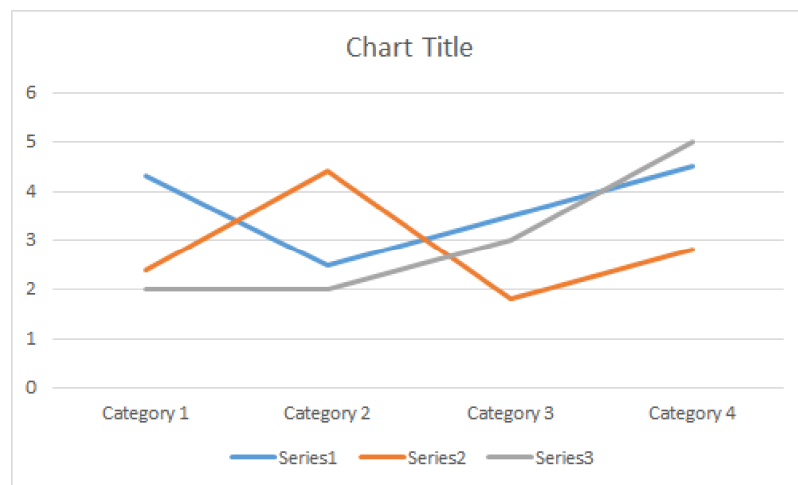
There are eight types of charts you can insert into a report, as well as several variations of each type from which to choose.

Chart Type	Example
------------	---------

Column

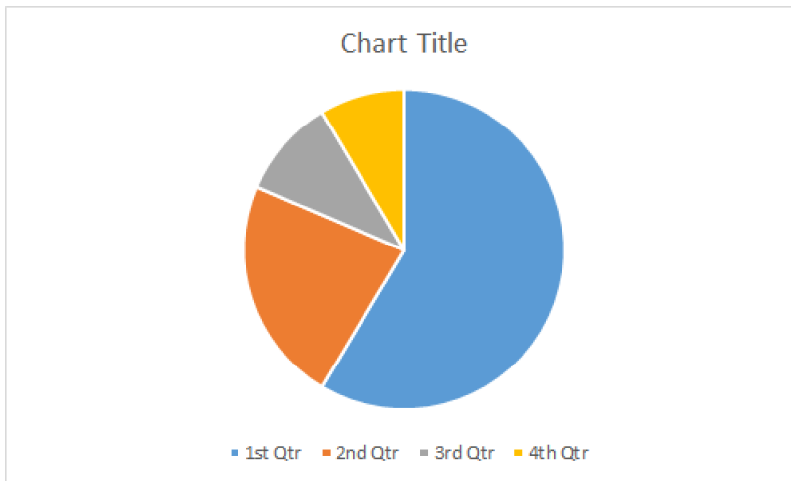


Line

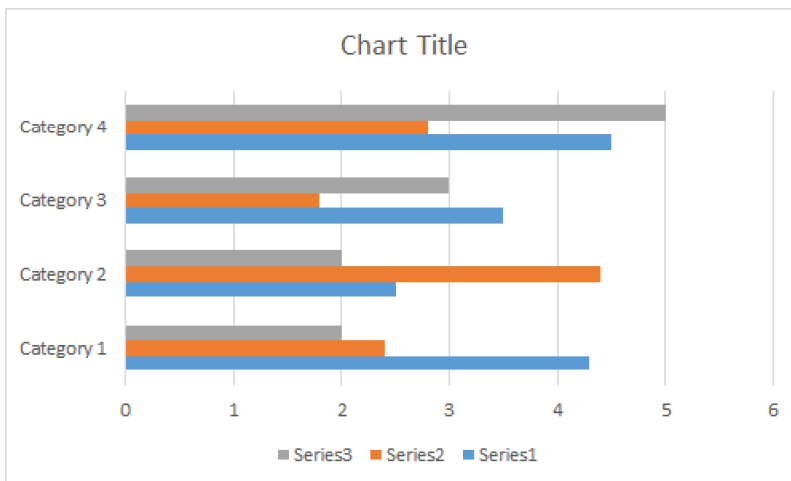


**Chart Type Example**

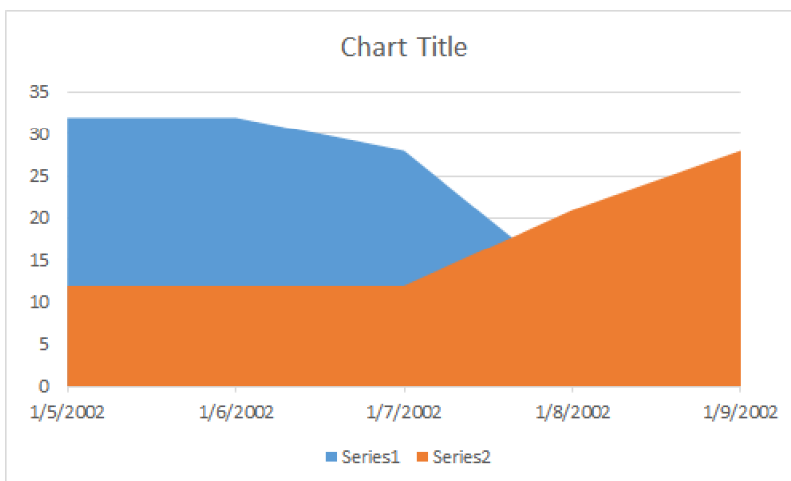
Pie



Bar

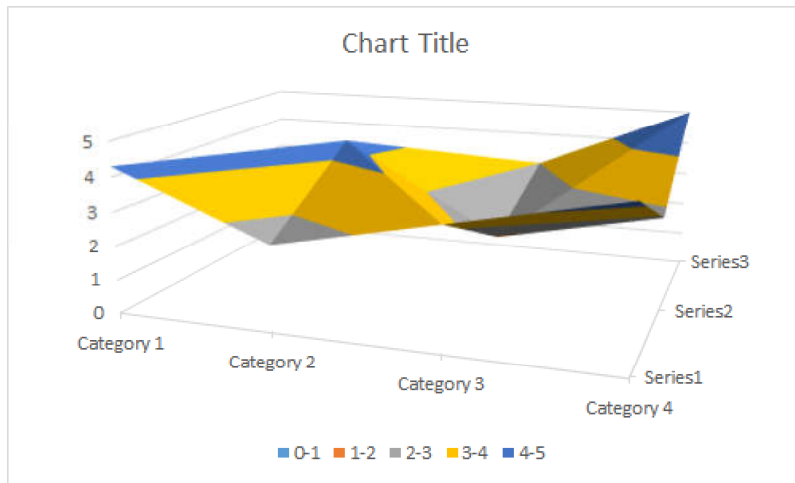


Area

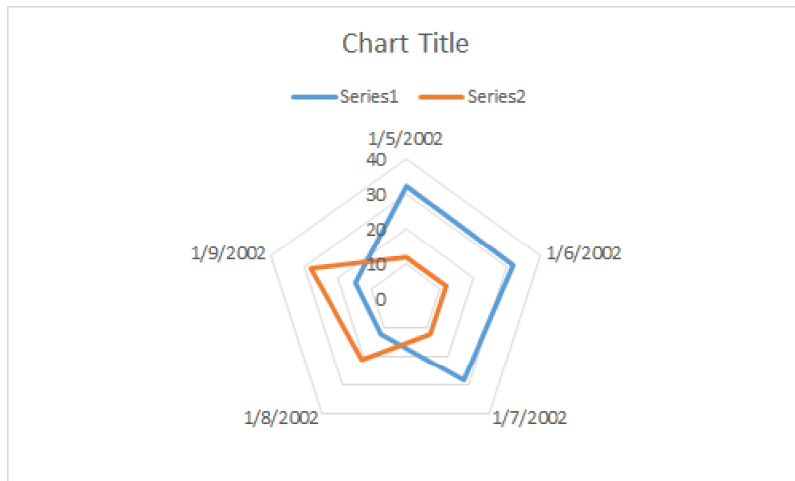


**Chart Type Example**

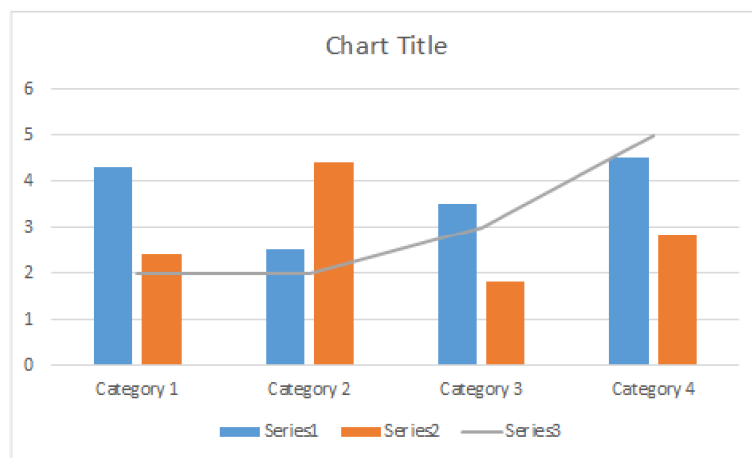
Surface



Radar

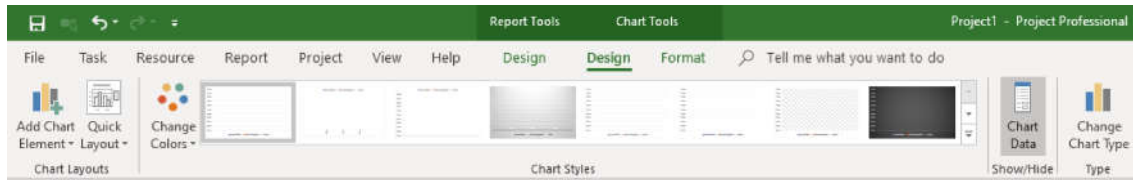


Combo



## The Chart Tools Design Contextual Tab

If you generate a new chart report, a **Chart Tools Design** contextual tab will appear on the ribbon. You can use the commands on this tab to change the look of the chart in the report.



**Figure 3-9:** Change the look of a chart using the *Chart Tools Design* commands.

The following table lists the commands on the **Chart Tools Design** contextual tab and indicates what they do.

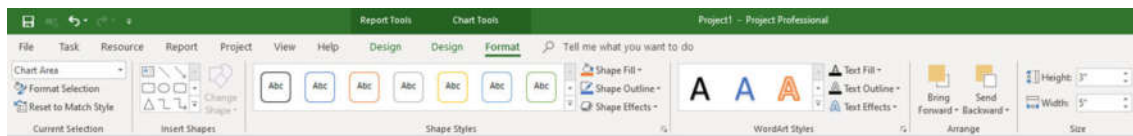
<b>Command</b>	<b>Description</b>
<b>Add Chart Element</b>	Adds titles, labels, and other elements to the chart.
<b>Quick Layout</b>	Changes how information is presented in the chart.
<b>Change Colors</b>	Changes the color scheme for the data elements (bars, lines, etc.) in the chart.
<b>Chart Styles</b>	Changes the graphical look of the chart.
<b>Chart Data</b>	Makes the <b>Field List</b> appear and disappear on the right side of the screen.
<b>Change Chart Type</b>	Changes the chart type (for example, from column chart to line chart).



**Note:** You will learn how to use the **Field List** later in this topic.

## The Chart Tools Format Contextual Tab

If you generate a new chart report, a **Chart Tools Format** contextual tab will appear on the ribbon. You can use the commands on this tab to format any shapes or text boxes in the chart report.



**Figure 3-10:** Use the commands on the *Chart Tools Format* tab to modify the elements in a chart report.



**Note:** These commands are very similar to the **Drawing Tools Format** contextual tab commands found in Word, Excel®, and PowerPoint®.

## The Table Tools Design Contextual Tab

If you generate a new table report, a **Table Tools Design** contextual tab will appear on the ribbon. You can use the commands on this tab to change the look of the table in the report.



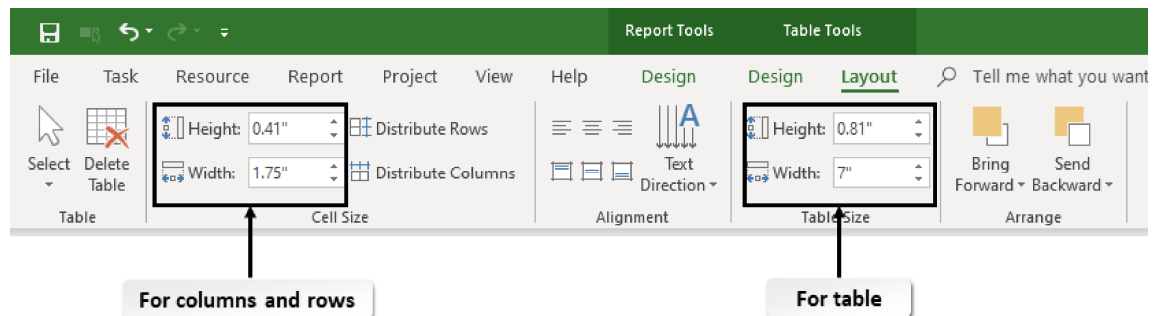
**Figure 3–11: The Table Tools Design commands enable you to format a table in a report.**

The following table lists the commands on the **Table Tools Design** contextual tab and indicates what they do.

<b>Command</b>	<b>Description</b>
<b>Table Style Options</b>	Adds rows and columns to the table.
<b>Table Styles</b>	Changes the graphical look of the table.
<b>Shading</b>	Changes the shading of cells in the table.
<b>Effects</b>	Adds a shadow or reflection effects to the table.
<b>WordArt Styles</b>	Applies and formats WordArt in the table.
<b>Table Data</b>	Makes the <b>Field List</b> appear and disappear on the right side of the screen.

## The Table Tools Layout Contextual Tab

If you generate a new table report, a **Table Tools Layout** contextual tab will appear on the ribbon. You can use the commands on this tab to change the layout of the table in the report.



**Figure 3–12: The Table Tools Layout commands enable you to change the layout of a table in a report.**

The following table lists the commands on the **Table Tools Layout** contextual tab and indicates what they do.

<b>Command</b>	<b>Description</b>
<b>Select</b>	Selects the entire table, a column, or a row for layout.
<b>Delete Table</b>	Removes the table from the report.
<b>Height</b>	Changes the height of the selected rows.
<b>Width</b>	Changes the width of the selected columns.
<b>Distribute Rows</b>	Makes all selected rows the same height.
<b>Distribute Columns</b>	Makes all selected columns the same width.

---

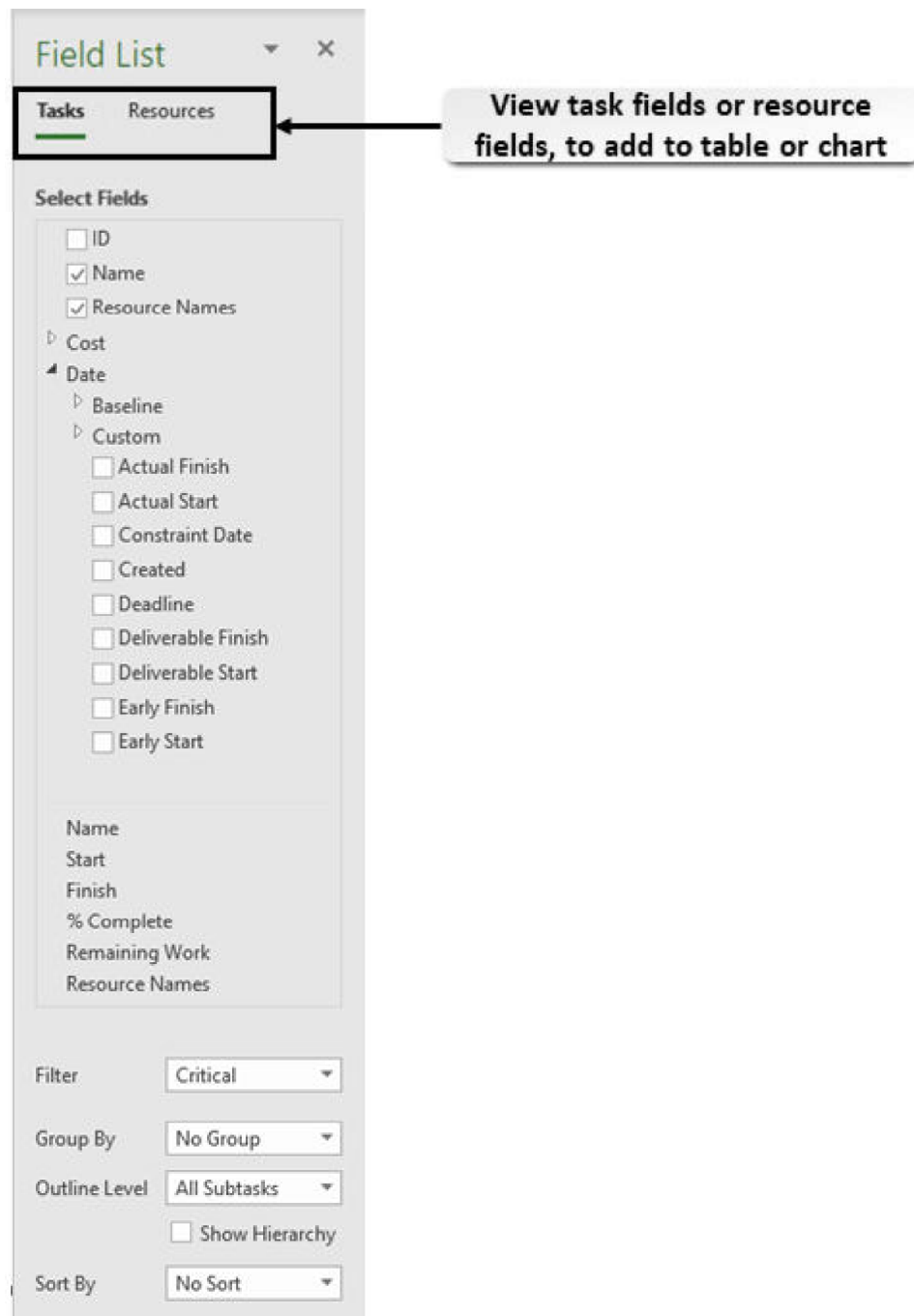
<b>Command</b>	<b>Description</b>
<b>Align Left</b>	Aligns text in the selection to the left.
<b>Center</b>	Aligns text in the selection to the horizontal center.
<b>Align Right</b>	Aligns text in the selection to the right.
<b>Align Top</b>	Aligns text in the selection to the top.
<b>Center Vertically</b>	Aligns text in the selection to the vertical center.
<b>Align Bottom</b>	Aligns text in the selection to the bottom.
<b>Text Direction</b>	Changes the direction of text in the selection.
<b>Height</b>	Changes the height of the entire table.
<b>Width</b>	Changes the width of the entire table.
<b>Bring Forward</b>	If objects in the report overlap, brings the selected table forward or to the front.
<b>Send Backward</b>	If objects in the report overlap, sends the selected table backward or to the back.

---

## The Field List Pane

The **Field List** pane enables you to change which types of fields are displayed in the selected chart or table of a report. If a chart or table shows task information, selecting the **Resources** tab in the **Field List** pane will cause resource information to be displayed in the chart (and vice versa).





**Figure 3–13: Specify how data appears in a report using the Field List task pane.**

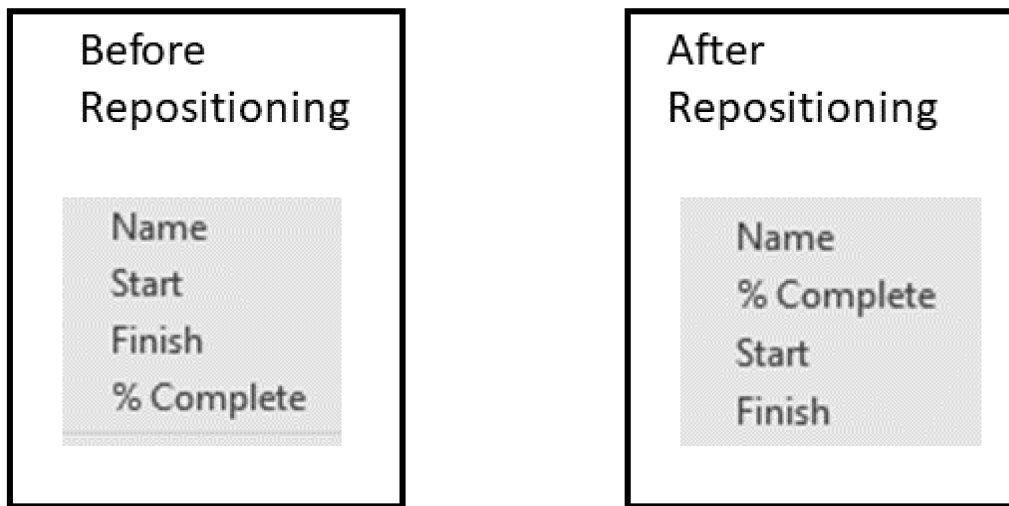
The **Field List** task pane includes many options for customizing charts and tables.

<b>Area of Field List</b>	<b>Choose</b>
<b>Tasks</b>	To display task information in the chart or table.
<b>Resources</b>	To display resource information in the chart or table.
<b>Select Fields</b>	Which fields to display in the chart or table. For example, you might want to display cumulative cost or work fields.

Area of Field List	Choose
Filter	A criterion for displaying task or resource information in the chart or table. For example, you can use this field to specify a date range for information.
Group By	A criterion for grouping task or resource information in the chart or table.
Outline Level	The level of task information to be displayed in the chart or table. (Not active when displaying resource information.)
Sort By	A criterion for sorting task or resource information in the chart or table.


### The List of Fields in the Field List Task Pane

If you wish to change the order of the fields in a table or chart, select the name of a field and drag it to the desired position in the list.



**Figure 3-14:** Drag the field name to the desired position in a table or chart.

You can close the **Field List** by selecting the **Close** button at the top of the list, or by selecting **Table Data** in the **Table Tools Design** contextual tab. The **Field List** can be opened by selecting **Table Data** again.

	<b>Note:</b> To learn more about customizing reports, check out the Spotlight on <b>Customizing Reports</b> presentation from the <b>Spotlight</b> tile on the CHOICE Course screen.
---	--

	Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Create Custom Reports.
---	--

# ACTIVITY 3-2

## Creating Custom Reports

### Before You Begin

The **My HR Manual Reports.mpp** project plan file is open.

### Scenario

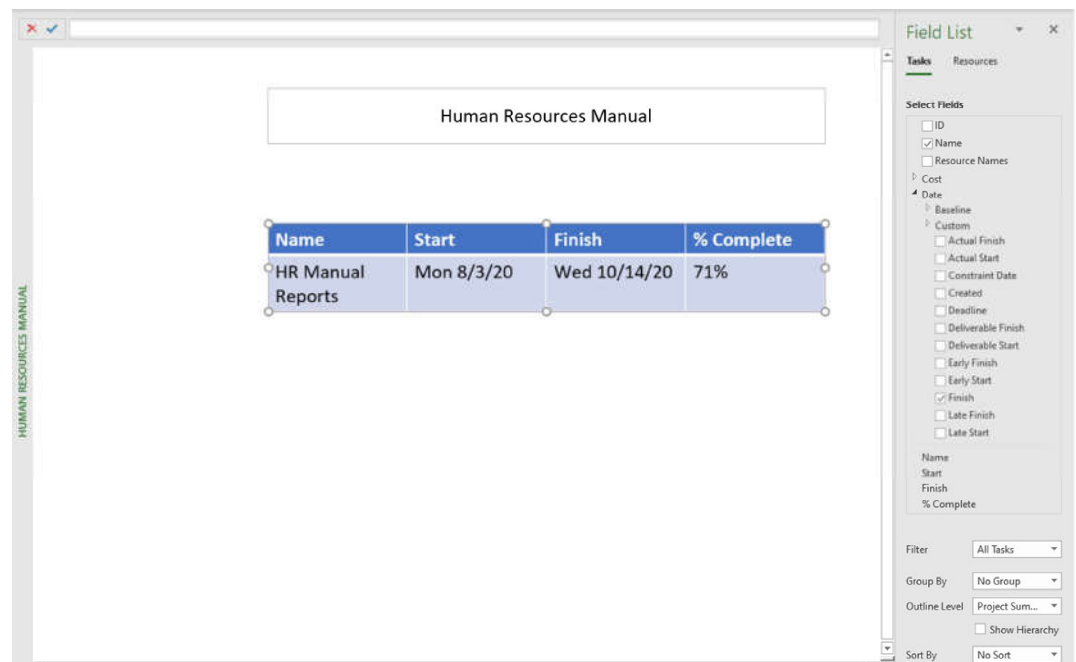
The HR Manual project has been chosen as a showcase project for the Project Management Office monthly meeting. The HR manager asks you to generate a new custom report for the PMO senior management with the following elements:

- A table of high-level tasks (or phases) that have been completed.
- A chart of remaining work.

### 1. Create a new table report.

- On the ribbon, select the **Report** tab.
- Select **New Report→Table**.
- In the **Report Name** dialog box, in the **Name** field, type *Human Resources Manual*
- Select **OK** to close the dialog box.

Notice that a new table report appears, and that the **Table Tools** contextual tab and the **Field List** pane are now visible so that you can modify the table.



### 2. Design the table.

- Verify that the table in the report is selected.

- b) On the **Table Tools Design** contextual tab, select **Table Styles**→**Medium Style 2 - Accent 6**.  
Notice the table now has a green style.

Name	Start	Finish	% Complete
My HR Manual Reports	Mon 8/3/20	Wed 10/14/20	71%

### 3. Select fields using the **Field List**.

- a) Verify that the table in the report is selected.  
 b) At the top of the **Field List** pane, verify that **Tasks** is selected.  
 c) From the **Filter** drop-down list, select **Completed Tasks**.  
 d) From the **Outline Level** drop-down list, select **Level 1**.  
 Notice that the table now contains information about high-level completed tasks.

Name	Start	Finish	% Complete
Begin Project	Mon 8/3/20	Mon 8/3/20	100%
Research Phase	Mon 8/3/20	Tue 8/11/20	100%
Outline Phase	Wed 8/12/20	Mon 8/24/20	100%
Development Phase	Tue 8/25/20	Thu 9/17/20	100%
Edit Phase	Fri 9/18/20	Tue 9/22/20	100%

### 4. Edit the table by moving one of the fields.

- a) Below the check boxes in the **Field List**, select **% Complete** and drag it up so it is between the **Name** and **Start** fields.

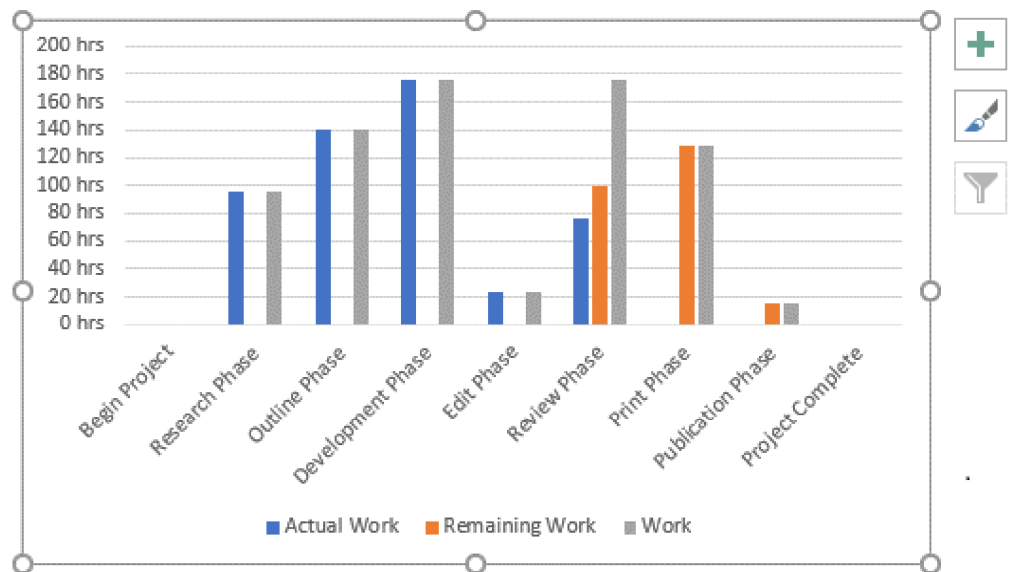
b) Verify that the table has changed.

Name	% Complete	Start	Finish
Begin Project	100%	Mon 8/3/20	Mon 8/3/20
Research Phase	100%	Mon 8/3/20	Tue 8/11/20
Outline Phase	100%	Wed 8/12/20	Mon 8/24/20
Development Phase	100%	Tue 8/25/20	Thu 9/17/20
Edit Phase	100%	Fri 9/18/20	Tue 9/22/20


c) Select the **Close** button in the upper-right corner of the **Field List** to close it.


5. Add a chart to the report.

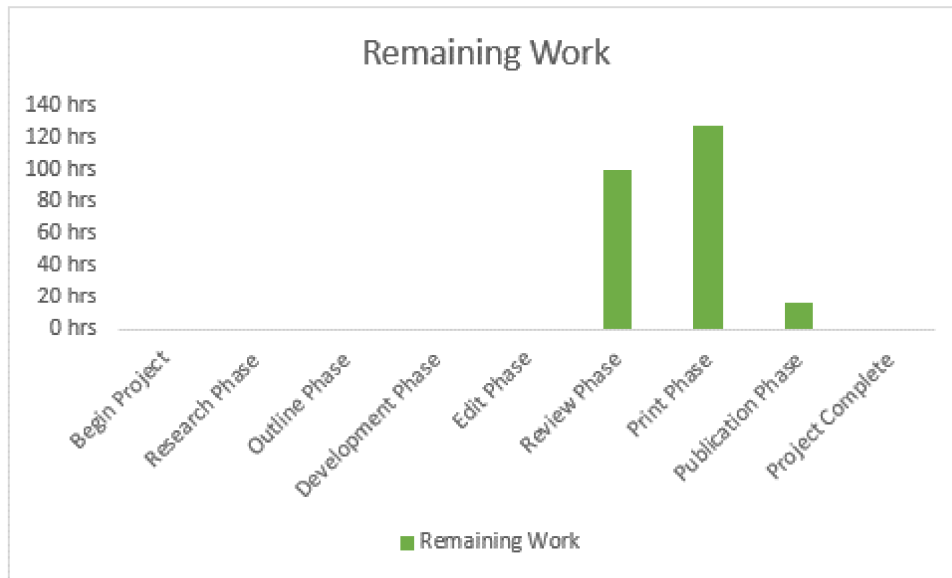
- a) Scroll down the report until the table is no longer visible on the screen.
- b) Select the **Report Tools Design** contextual tab.
- c) Select **Chart**.
- d) In the **Insert Chart** dialog box, find and select **Clustered Column** and then select **OK**.



6. Edit the chart.

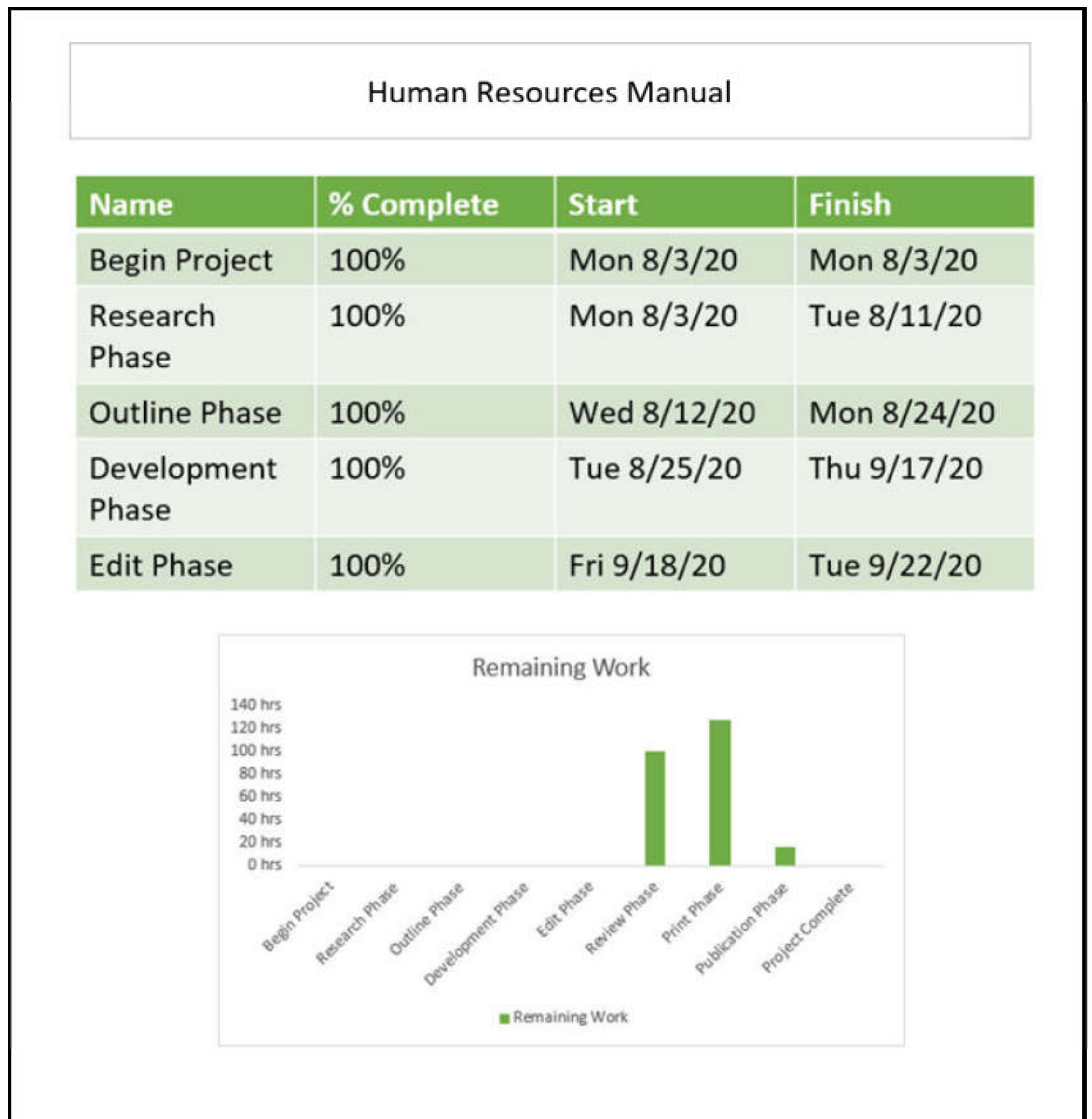
- a) If necessary, select the chart to display the chart edit buttons.
- b) Select the **Chart Elements** button. 
- c) In the **Chart Elements** pop-up box, uncheck the **Gridlines** check box. Notice that the gridlines are no longer visible on the chart.
- d) If necessary, select the chart to display the chart edit buttons again.

- e) Select the **Chart Styles** button. 
- f) From the **Chart Styles** pop-up box, select the **Color** tab.
- g) Scroll down to **Monochromatic Palette 6** (which is different shades of green) and select it. The bars on the chart are now different shades of green.
- h) If necessary, select the chart to display the chart edit buttons again.
- i) In the **Field List** pane, in the **Work** section, uncheck the **Actual Work** and **Work** check boxes, leaving only the **Remaining Work** check box checked.



Notice that only the **Remaining Work** series is displayed on the chart.

7. Scroll up to review the entire report.



8. Save the file and leave it open.