

# TOPIC C

## Create a Visual Report

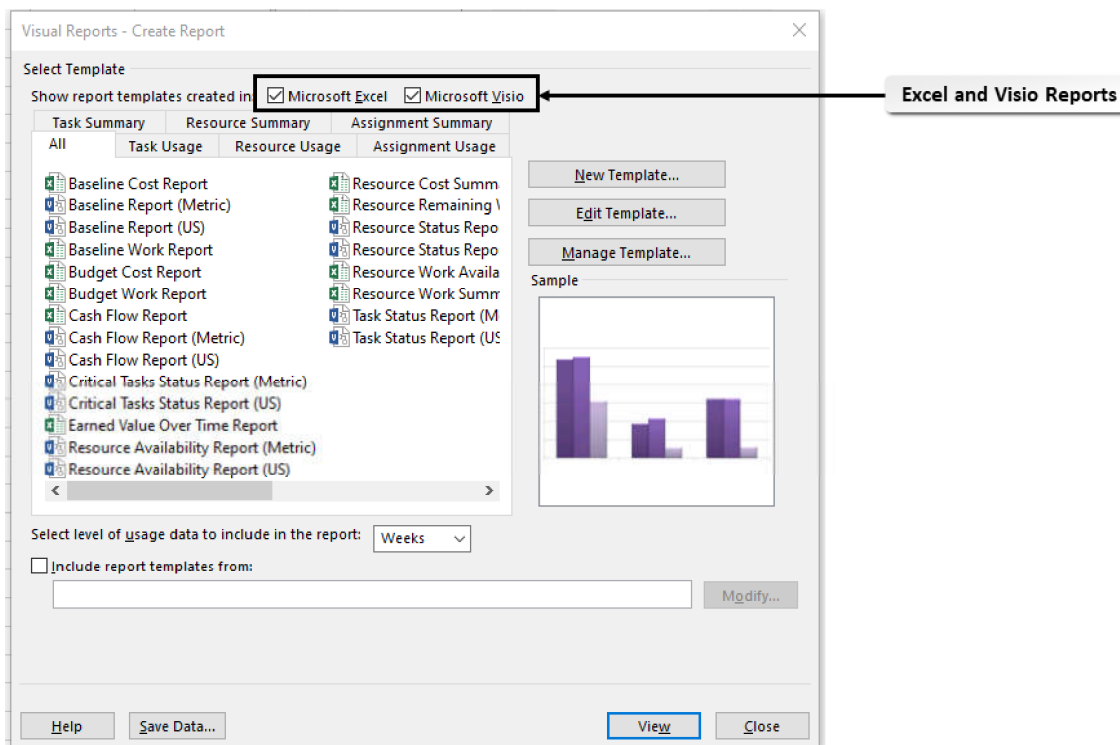
While Project is a very useful analysis and report tool itself, you may find the need to use the powerful features of Microsoft® Excel® or Visio® to create more complex reports and perform additional analysis. Fortunately, Project's Visual Reports feature allows you to do just that.

### Visual Reports

**Visual Reports** enable you to export your project's data to a PivotChart in Microsoft Excel and to a PivotDiagram in Microsoft Visio. These views provide a way for you to choose what fields, including custom fields, to display in a report while viewing it, and quickly modify how the report is displayed without having to regenerate it from within Project. With this flexibility, Visual Reports provide a more agile reporting solution than basic reports.

### The Visual Reports Dialog Box

When you select the **Visual Reports** button, the **Visual Reports - Create Report** dialog box will be displayed. In this dialog box, you can choose which built-in Excel or Visio templates you want to use and what timescale you want to include in the report. The Visual Report generated by the dialog box will automatically open as a new Excel or Visio file. You can modify the Visual Report in Excel or Visio and save it in those file formats.



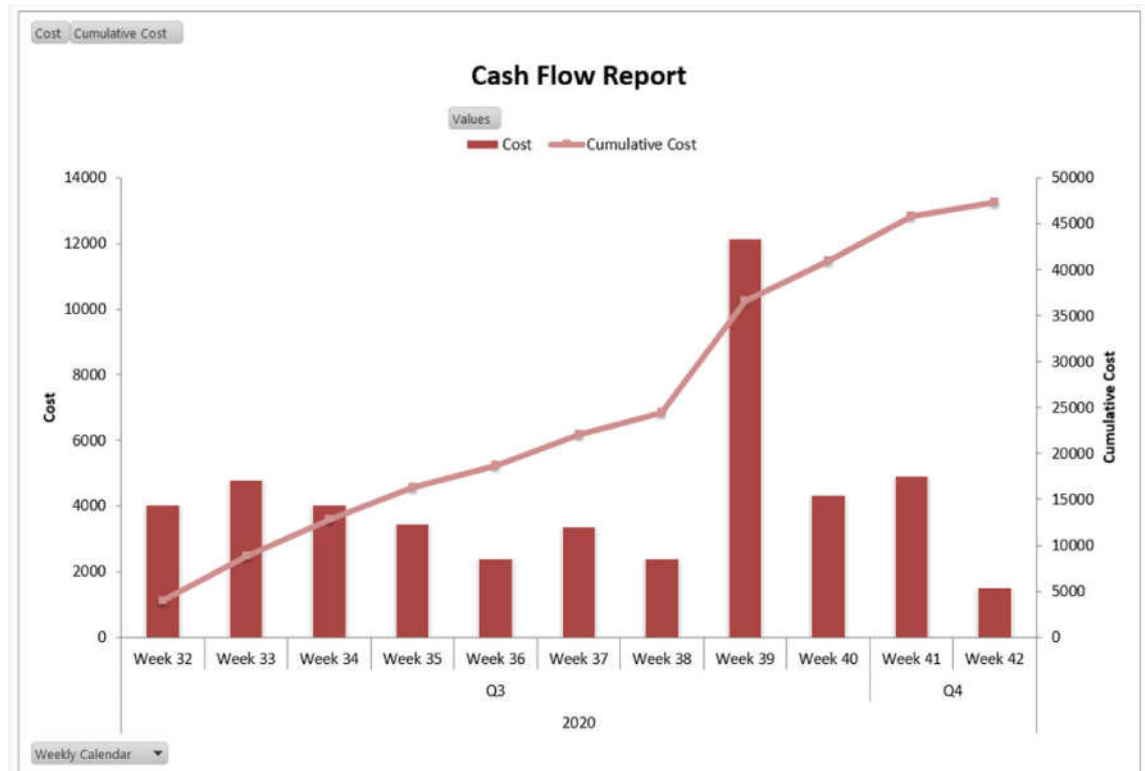
**Figure 3-15:** Access ready-made report templates in the Visual Reports – Create Report dialog box.



**Note:** You can do much with Visual Reports from this dialog box. However, given the complexity of the procedures and the limited number of students who are likely to use them, they are not covered in detail in this course.

## Excel PivotCharts

In Excel, a *PivotChart* report can help you visualize Project data so that you can easily see comparisons, patterns, and trends. This will enable you to make informed decisions about critical data in your project. In Project, when a Visual Report is generated, it is displayed as a PivotChart and *PivotTable*. The PivotTable is an interactive table that contains data from the project plan. A PivotChart report is an interactive chart that graphically represents the data in a PivotTable. PivotChart reports can be created only from an existing PivotTable report. Once a report has been created, you can make changes to it by filtering the content or changing the layout.



**Figure 3–16:** A PivotChart is used to graphically represent complex Project data.



**Note:** To learn more about filtering PivotChart data, check out the Spotlight on **Filtering PivotChart Data** presentation from the **Spotlight** tile on the CHOICE Course screen.

## Visio PivotDiagrams

In Microsoft Visio, a *PivotDiagram* is a collection of shapes arranged in a tree structure that helps you to analyze and summarize data in a visual, easy-to-understand format. It starts out as a single shape, called a top node, that contains information imported from Project. You can break the top node into a level of subnodes to view your data in various ways. When a visual report is displayed in Visio, it is displayed as PivotDiagrams. This is similar to the PivotTables and PivotCharts displayed in Excel. The PivotDiagrams in Visio are mainly used for hierarchical data such as work breakdown structures. You can also customize these diagrams and perform calculations in them.

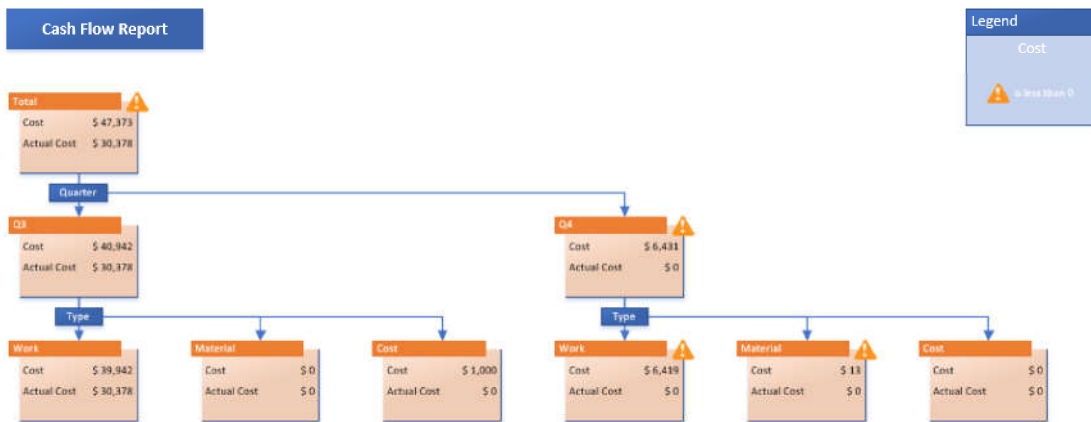


Figure 3-17: A PivotDiagram is another tool used to visualize Project data.

 Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Create a Visual Report.

# ACTIVITY 3–3

## Creating Visual Reports

### Before You Begin

The **My HR Manual Reports.mpp** project plan file is open, and Excel has been installed on your computer.

### Scenario

The HR manager asks you to prepare a report of cash usage for the HR Manual project.

#### 1. Open the **Visual Reports - Create Report** dialog box.

- a) Select the **Report** tab.
- b) Select the **Visual Reports** button.  
The **Visual Reports - Create Report** dialog box will open.

#### 2. Set the parameters for the Visual Report.

- a) Select the **All** tab.
- b) Uncheck the **Microsoft Visio** report templates check box if it is checked, to see only the **Microsoft Excel** reports.



**Note:** It is not necessary to uncheck this box, but it makes seeing only the Excel report templates easier.

- c) On the **All** tab, select the **Cash Flow Report** with an Excel icon next to it.
- d) In the **Select level of usage data to include in the report** field, select **Weeks** from the drop-down list.
- e) Select **View**.
- f) Wait for Project to generate an Excel PivotChart. This can take several seconds.  
Excel opens automatically and displays a PivotChart that shows quarterly cash flow data.
- g) Maximize the Excel window and observe that you are viewing the **Chart1** worksheet.

#### 3. Modify the report to display monthly cash flow data.

- a) Select the **Task Usage** sheet at the bottom of the chart to view the PivotTable.
- b) Select the **plus sign** next to **Q3** to display weekly data for the third quarter.
- c) Select the **plus sign** next to **Q4** to display weekly data for the fourth quarter.
- d) Select the **Chart1** sheet at the bottom of the PivotTable to view the PivotChart.

#### 4. Save the created Excel file in **C:\091099Data\Reporting on Project Progress as *My Cash Flow Report.xlsx*** and close the file.

- a) Select **File→Save As** and navigate to **C:\091099Data\Reporting on Project Progress**.
- b) Type ***My Cash Flow Report.xlsx*** and select **Save**.
- c) If necessary, in the **Microsoft Excel Compatibility Checker** message, select **Continue**.
- d) Close Excel.

#### 5. Close the **Visual Reports - Create Report** dialog box.

#### 6. Save and close the Project file.

## Summary

In this lesson, you viewed Project's existing reports, created a custom report, and created a Visual Report.

**What is the most important thing to do in Project to create a helpful report?**

**Which reports will you use on your next project?**



**Note:** Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.