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Lab Guide

PPM 103:

Creating Meaningful Reports for Project Management

Daniel Cooper & Julie Cozen-Harel

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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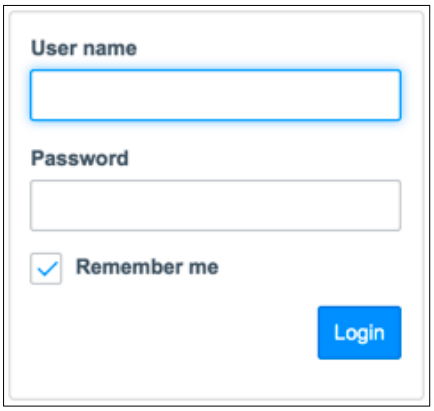
Lab Goal

This lab covers basic reporting within the platform, including filtering list views, creating new report types, scheduling and adding reports to dashboards.

Lab 1.0
Basic Reporting

Log on to Your Training Instance

1. Navigate to the unique instance URL provided.

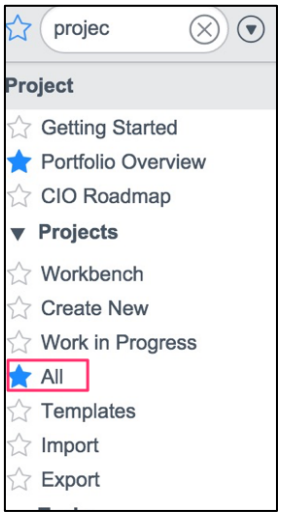


2. Log on with the provided credentials.

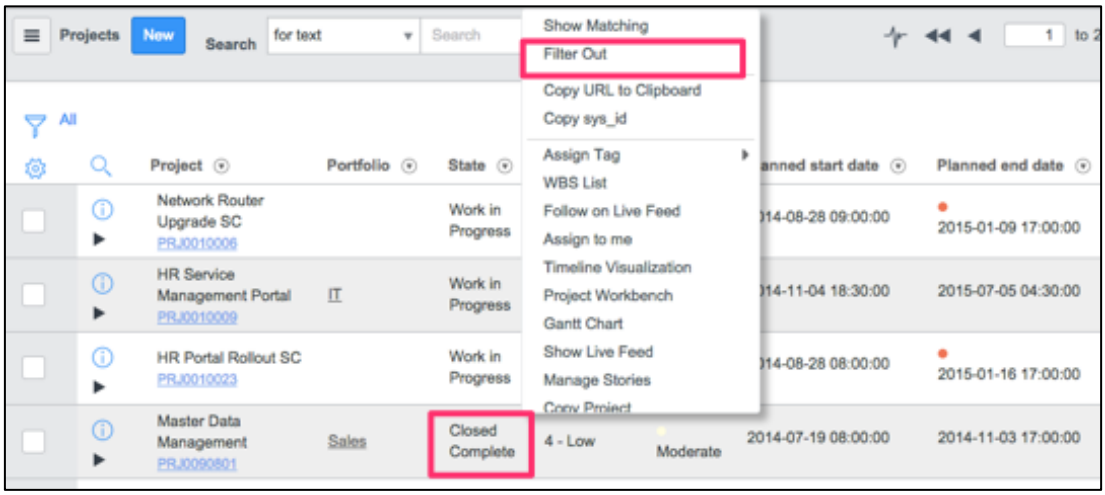
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Basic Reporting

1. Navigate to **Projects > All**.

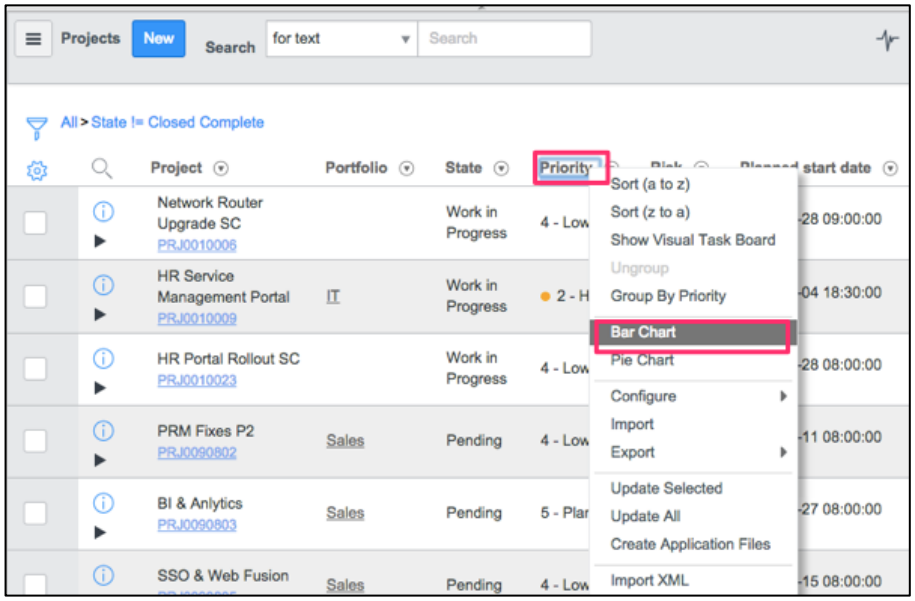


2. Right-click a Project with state of **Closed Complete** and select **Filter Out**.



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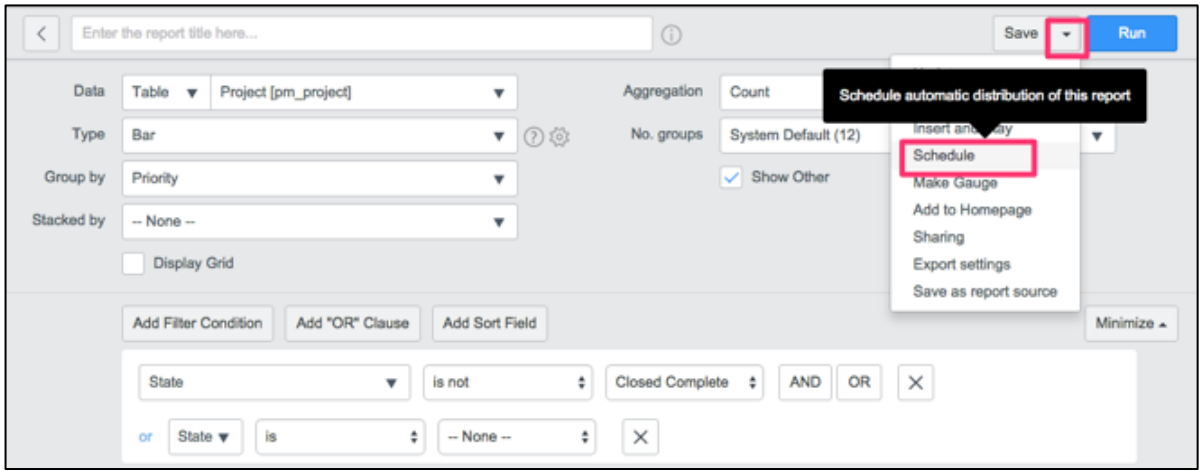
3. Right click the **Priority** column and select **Bar Chart**.



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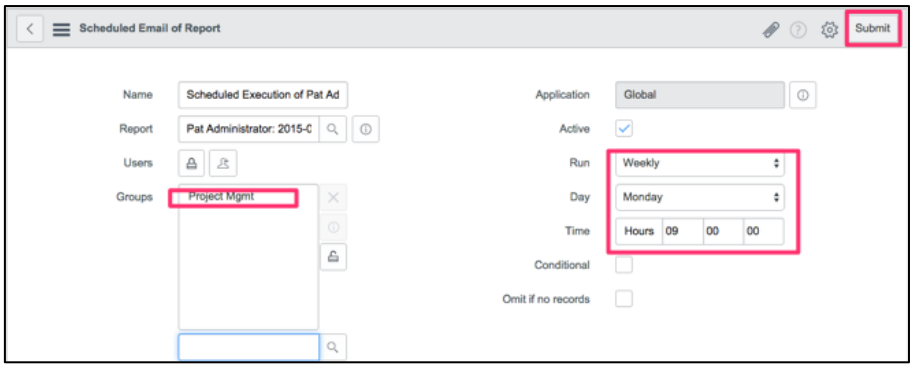
Schedule Report

1. Click the down arrow next to **Save** and select **Schedule**.



2. Enter the following information in the **Scheduled Email of Report** form:

   Groups: **Project Mgmt**
   Run: **Weekly**
   Day: **Monday**
   Time: **Hours 9:00:00**

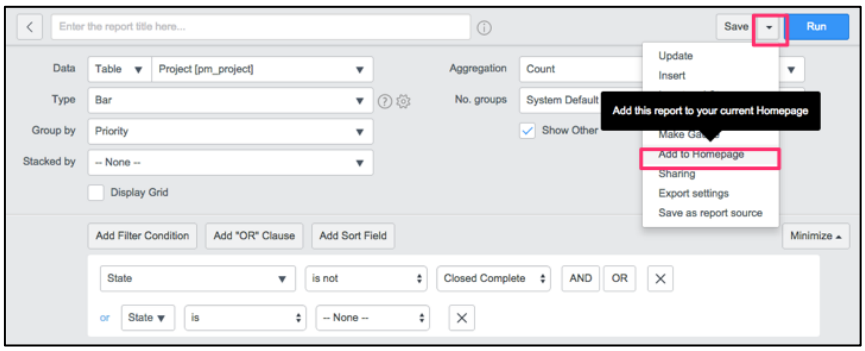


3. Click **Submit**.

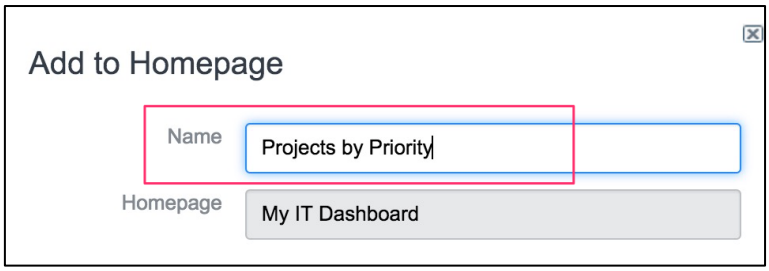
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Add to Homepage

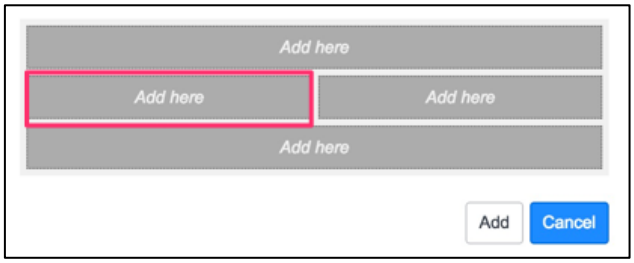
1. Click the down arrow and select **Add to Homepage**.



2. Enter into the Name field: **Projects by Priority**.



3. Select the left box labeled **Add Here**.

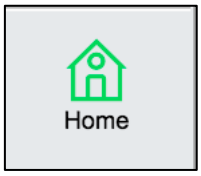


4. Click **Submit**.

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Lab Success Verification

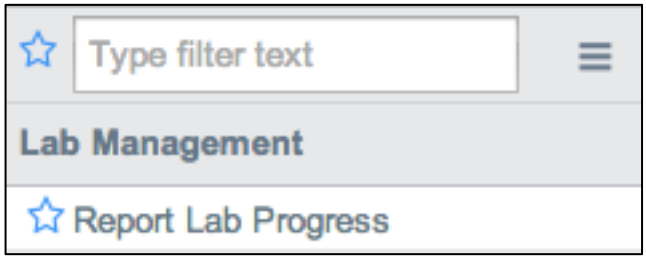
1. Click on the **Home** icon on the left side favorites bar.



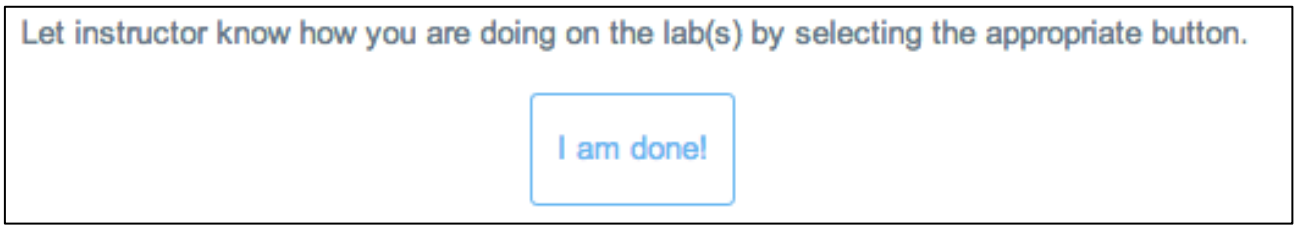
2. You should see all the new **Project by Priority** pie chart on the dashboard**.**

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am done!**



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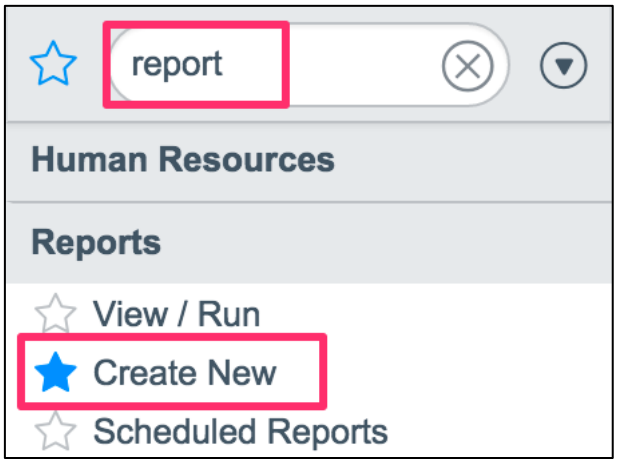
Lab Goal

This lab explains how to generate a report to compare actual project costs to estimated project costs based on time cards for the project tasks being worked. The data in this lab is based upon the demonstration you just saw.

Lab 2.0
Time Card Reporting

Create Time Card Report

1. Navigate to **Reports > Create New**.



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2. Enter the following information in the Report form:

   - Name: **Estimated vs Actual Project Costs**
   - Data: **Table | Project Task [pm_project_task]**
   - Type: **List**
   - Group by: **Covered in Step 3**
   - Columns: **Task; Assigned to; Estimated cost; Actual cost; Planned start date; Planned end date**

   Note: Select a column from the **Available** list by either double clicking the column name, or by selecting it and clicking the right button.



3. Set the **Group by** field with the following:

   - Open the dropdown menu, scroll to the bottom and select **Show Related fields**.
   - Open the dropdown menu again and select **Top project => Planned task fields**.
   - Open the dropdown menu once more and select **Short description**.

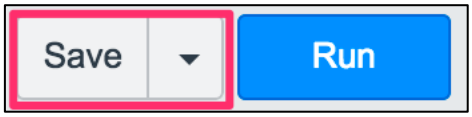
   Note: You have just done what is known as dot-walking to pull the project name of the project tasks we are reporting on.

4. Click **Add Filter Condition** and set the condition field to **Top project.Short description | contains| Sample Waterfall** field with the following:

   - Open the first dropdown menu, scroll to the bottom and select **Show Related fields**.
   - Open the dropdown menu again and select **Top project => Planned task fields**.
   - Open the dropdown menu once more and select **Short description**.



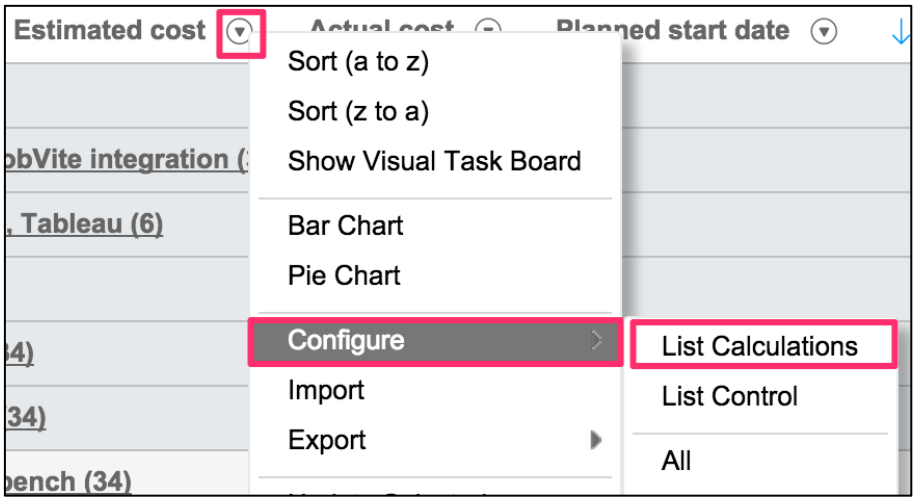
5. Click **Save** in the top right corner to save the report.



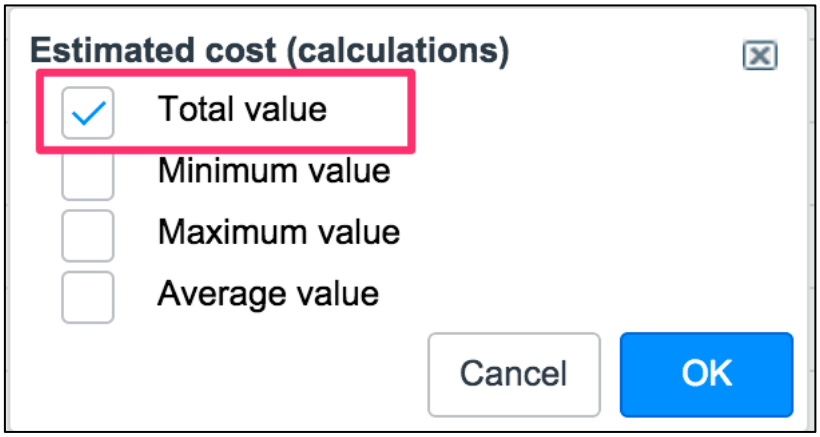
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Sum Estimated and Actual Cost Fields

1. In the bottom of the report window, click the down arrow by **Estimated cost** and go to **Configure -> List Calculations** in the dropdown window.

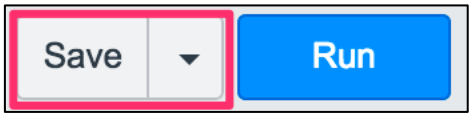


2. Check the **Total value** option in the **Estimated cost (calculations)** pop-up and click **OK**.



3. Repeat the above step for the **Actual cost** column.

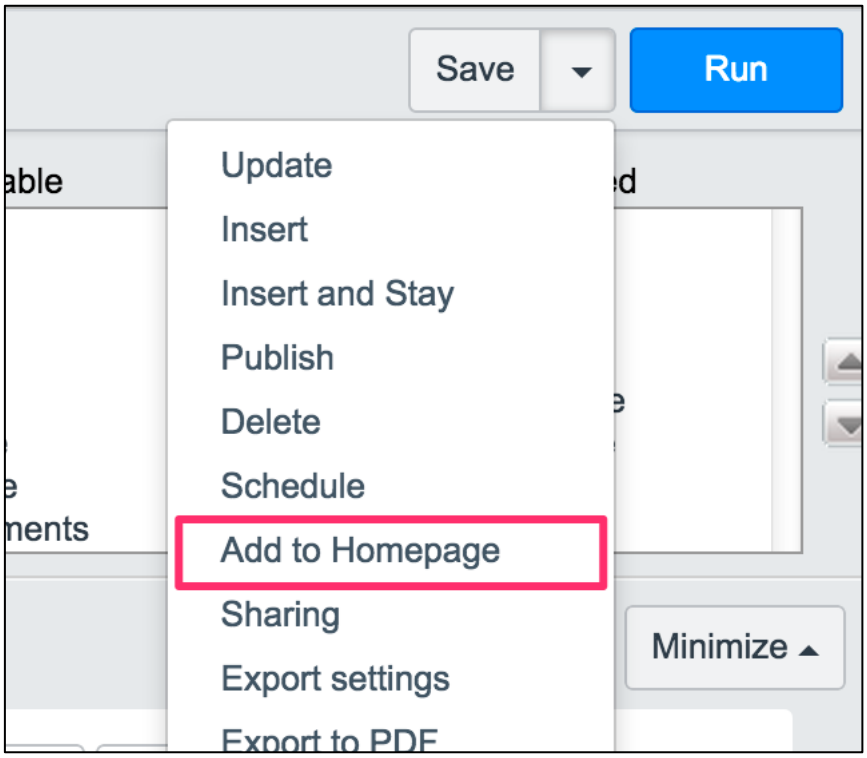
4. Click **Save** in the top-right corner to save the report.



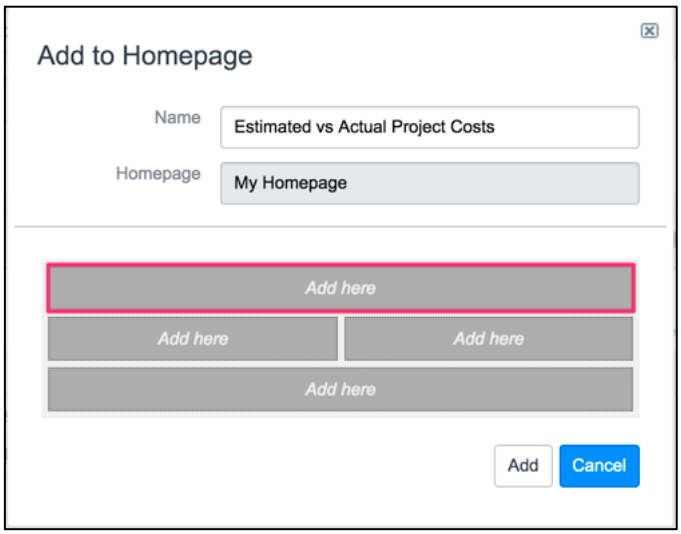
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Add Report to Homepage

1. Click the dropdown arrow to the right of the **Save** button and select **Add to Homepage**



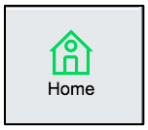
2. In the **Add to Homepage** pop-up, select the top section and click **Add here**.



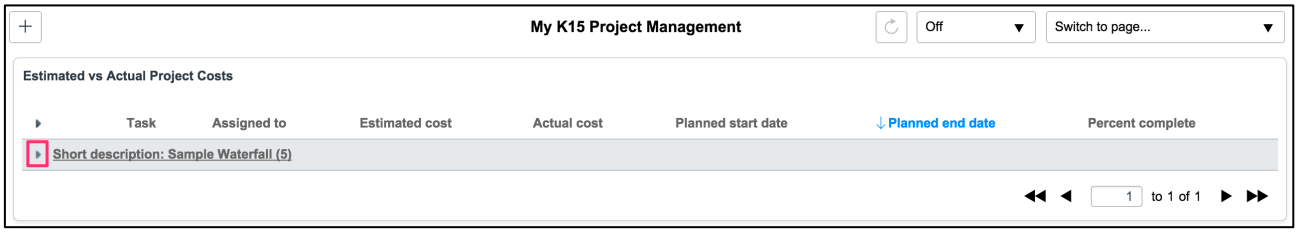
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Lab Success Verification

1. Click the **Home** icon on the left side favorites bar.



2. Click the arrow to expand the **Sample Waterfall** project in the **Estimated vs Actual Project Costs** report, which was just added to the top of the homepage.



3. You should see all the **Estimated Costs** and **Actual Costs** for each task in the **Sample Waterfall** project along with a sum of all estimated and actual costs at the bottom of the respective columns.

Task	Assigned to	Estimated cost	Actual cost
Short description: Sample Waterfall (5)			
Auto created task 1 PRJTASK0012669		$3,200.00	$4,350.00
Auto created task 2 PRJTASK0012670		$9,600.00	$8,735.00
Auto created task 3 PRJTASK0012671		$400.00	$654.00
Auto created task 4 PRJTASK0012672		$400.00	$200.00
Auto created task 5 PRJTASK0012673		$400.00	$408.00
New rows			
Insert a new row...			
		Total $14,000.00	Total $14,347.00

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.

2. Click **I am done!**

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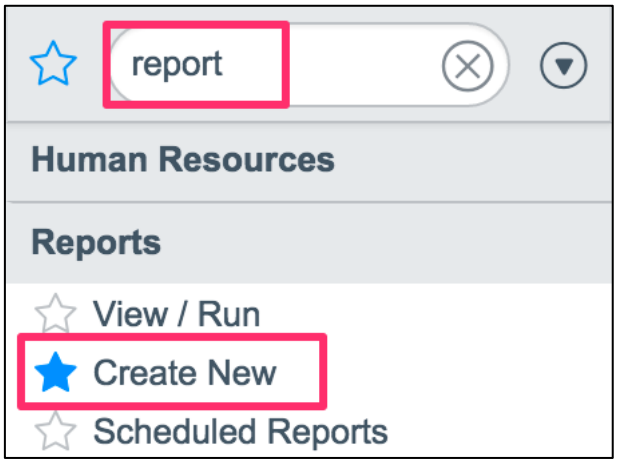
Lab Goal

This lab explains how to generate a report to compare current project timelines to original project baselines. The data in this lab is based upon the demonstration you just saw.

Lab 3.0
Baseline Reporting

Create Baseline Report

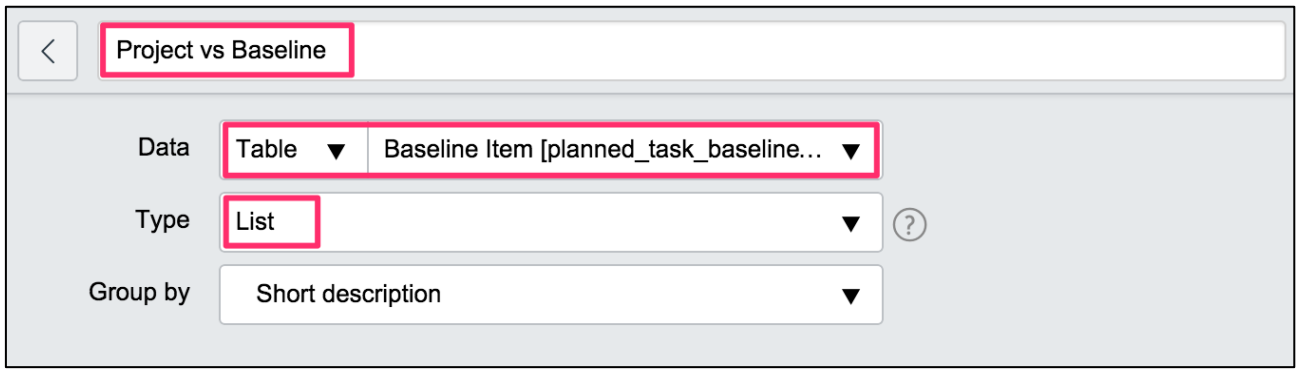
1. Navigate to **Reports > Create New**.



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2. Enter the following information in the Report form:

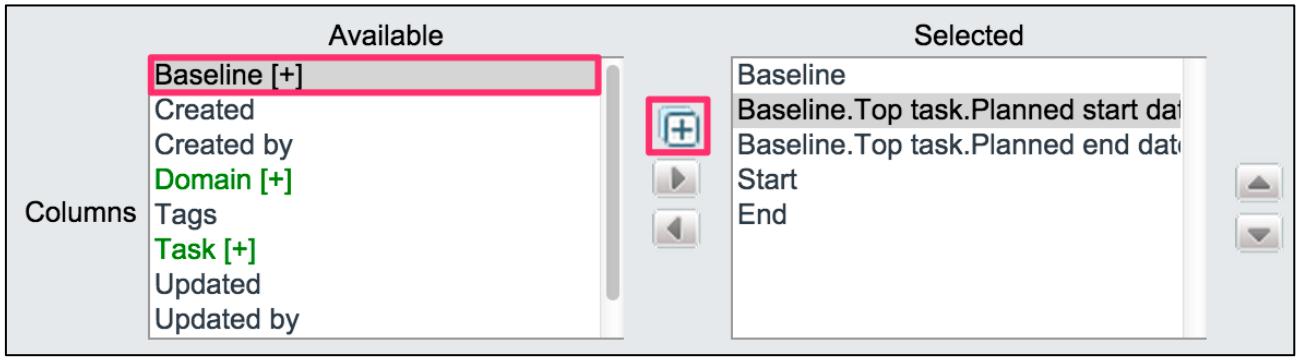
   - Name: **Project vs Baseline**
   - Data: **Table | Baseline Item [planned_task_baseline_item]**
   - Type: **List**
   - Group by: **Covered in Step 3**



   - Columns: **Baseline; Baseline.Top task.Planned start date; Baseline.Top task.Planned end date; Start; End**

     - **Important:** Click once on a field from the Available columns, and click the plus (**+**) button to see related fields in that table (i.e., to get the **Baseline.Top task.Planned start date**, click **Baseline [+] -> Top task [+] -> Planned start date**).

   Note: Select a column from the Available list by either double clicking the column name, or by selecting it and clicking the right button.



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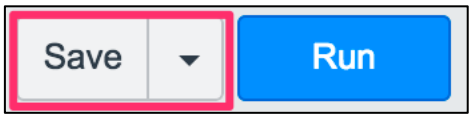
3. Set the **Group by** field with the following:
   - Open the dropdown menu and select **Task => Planned task fields.**
   - Open the dropdown menu again and select **Top task => Planned task fields.**
   - Open the dropdown menu once more and select **Short description.**

   Note: You have just done what is known as "dot-walking" to pull the project name of the project tasks we are reporting on.

4. Click **Add Filter Condition** and set the condition field to **Task.Top task | is same | Task** with the following:
   - Open the dropdown menu, scroll to the bottom and select **Show Related Fields.**
   - Open the dropdown menu again and select **Task => Planned task fields.**
   - Open the dropdown menu once more and select **Top Task.**



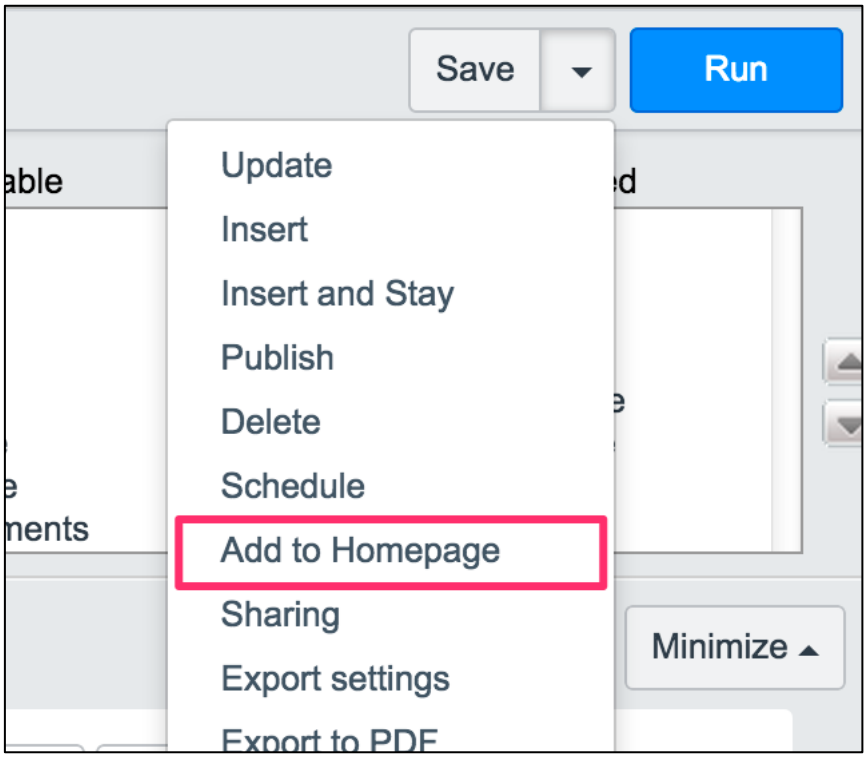
5. Click **Save** in the top- right corner to save the report.



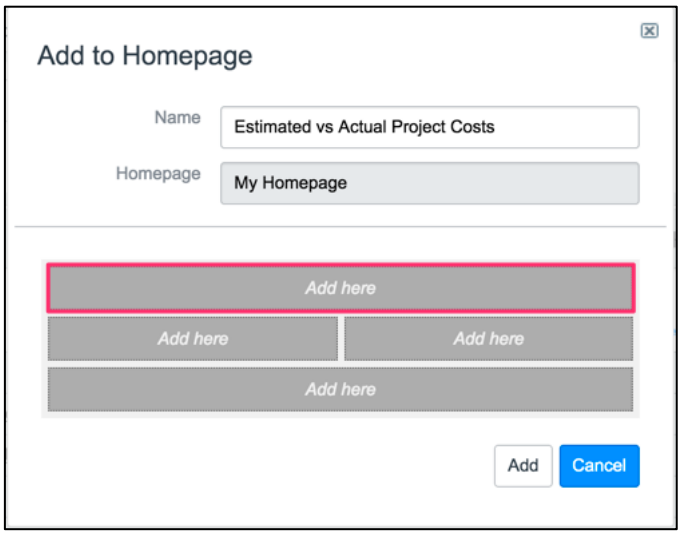
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Add Report to Homepage

1. Click the dropdown arrow to the right of the **Save** button and select **Add to Homepage**.



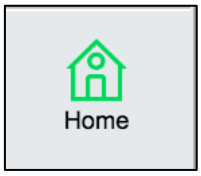
2. In the **Add to Homepage** pop-up, select the top section and click **Add here**.



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Lab Success Verification

1. Click on the **Home** icon on the left side favorites bar.



2. Click the arrow to expand the **Sample Waterfall** project in the **Project vs Baseline** report, which was just added to the top of the homepage. You should see three color coded baselines.

Baseline	Planned start date	Planned end date	Start	End
Short description: Sample Waterfall (3)				
30 Day Baseline	2015-03-30 08:00:00	2015-05-04 08:00:00	2015-03-30 08:00:00	2015-05-04 08:00:00
7 Day Baseline	2015-03-30 08:00:00	2015-05-04 08:00:00	2015-03-30 08:00:00	2015-04-11 08:00:00
Initial Baseline	2015-03-30 08:00:00	2015-05-04 08:00:00	2015-03-30 08:00:00	2015-04-04 08:00:00

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.

2. Click **I am done!**

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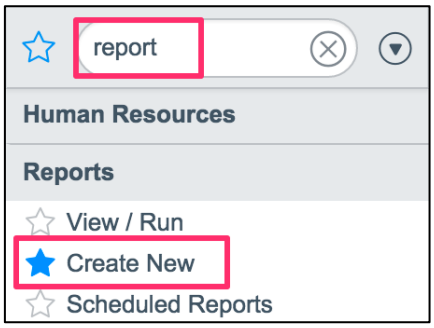
Lab Goal

This lab explains how to generate a report of all Projects associated with Portfolios. Reports can be displayed from the Portfolio view, which allows users to see visually all pending projects sorted by Portfolio.

Lab 4.0 Portfolio Reporting

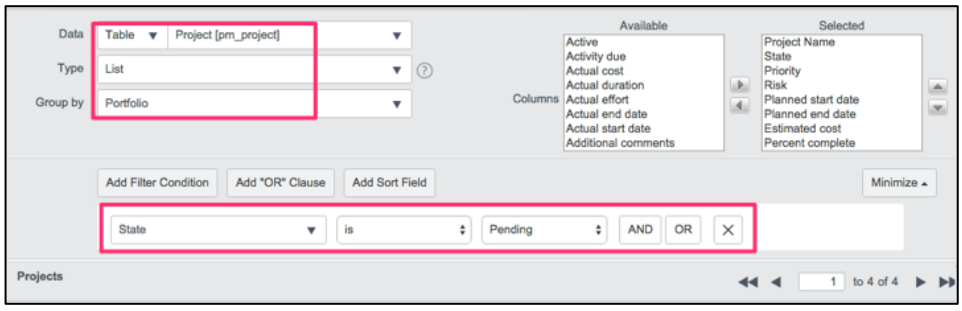
Portfolio Reporting

1. Navigate to **Reports > Create New**.



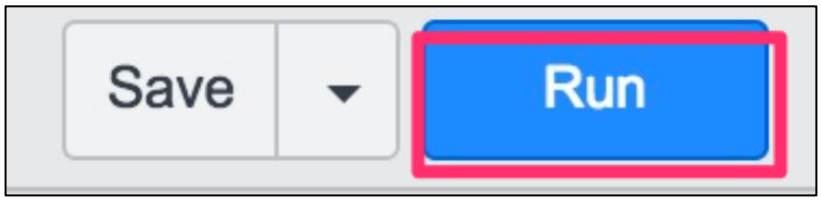
2. Enter the following information in the Report form:

- Name: **Pending Projects by Portfolio**
- Table: **Project**
- Type: **List**
- Group by: **Portfolio**
- Add filter Condition
  - **State: is: Pending**



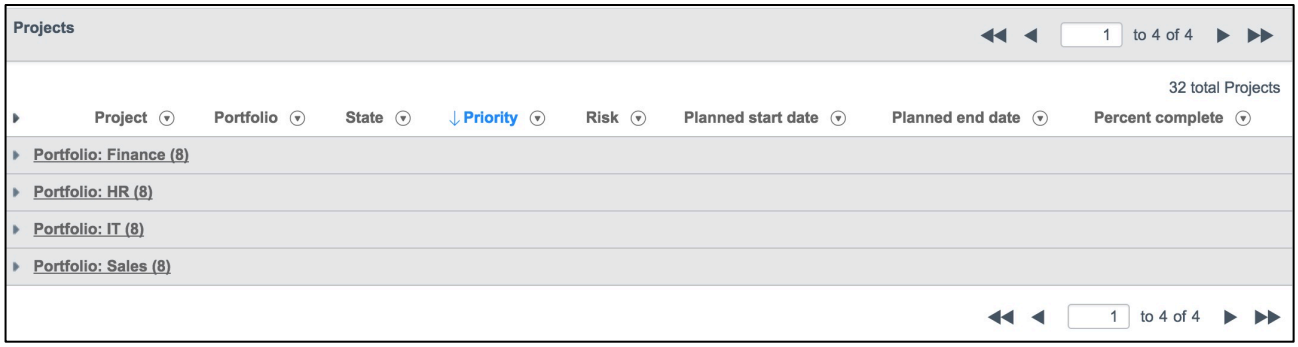
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3. Click **Run** in the top right corner to run the report.



Lab Success Verification

1. Final report should look like the example.



Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.

2. Click **I am done!**

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