

Objectives

- Create a custom table
- Create a custom view
- Create a custom report

MS Project has many predefined tables, views and reports that are designed to meet your project management needs. We have already used many of these in previous lessons. But sometimes these predefined items do not serve the information requirements of your project. Therefore, MS Project gives you the ability to create your own tables, views and reports.

Creating A Custom Table

Tables are columns and rows of schedule information. They are very similar to a spreadsheet in Excel, but are really the same as a table in an Access database. (In other words, think of your project as an Access database, with each table in the project as holding and displaying information). MS Project comes with 16 predefined task tables and 10 predefined resources tables. While we have used filters and sorting to reorganize these predefined tables, we have the capability to design our own table from scratch, edit an existing table, or create a new table based upon an existing table.

For this lesson, begin by

1. Open your file, **MyLab8_XXX.mpp**, from the previous lab 9. Since we will not be changing any crucial data, do not rename this file. We will be using it for this lesson.
2. Under **File - Properties**, check the **author's name** and the **manager's name** to reflect your name.
3. **Check the name** of the main summary task (task #1) to ensure it reflects **your name**.
4. Finally, before continuing, under **Project** menu, select **Project Information**.
5. **Change the current date to October 29, 2007. (Important: You must do this every time you open this file!)**
6. Make sure you are in the Gantt chart View.
7. On the **View** menu, point to **Table**, and then select **More Tables**.
8. In the Tables dialog box, select **Summary**, and then click **Copy**.

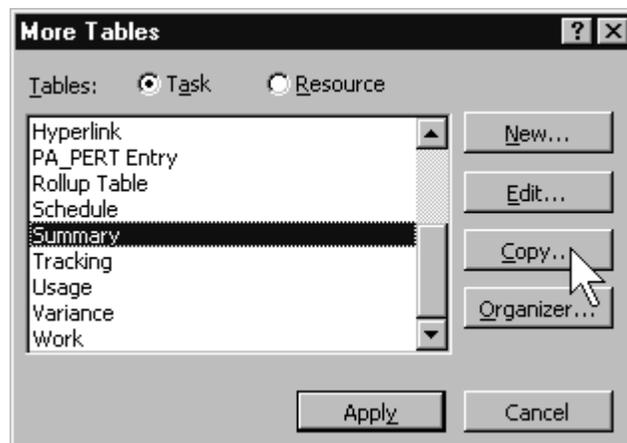


Figure 1

9. A copy of the Summary table is displayed in the table definition dialog box. It lists all the fields that make up this table.

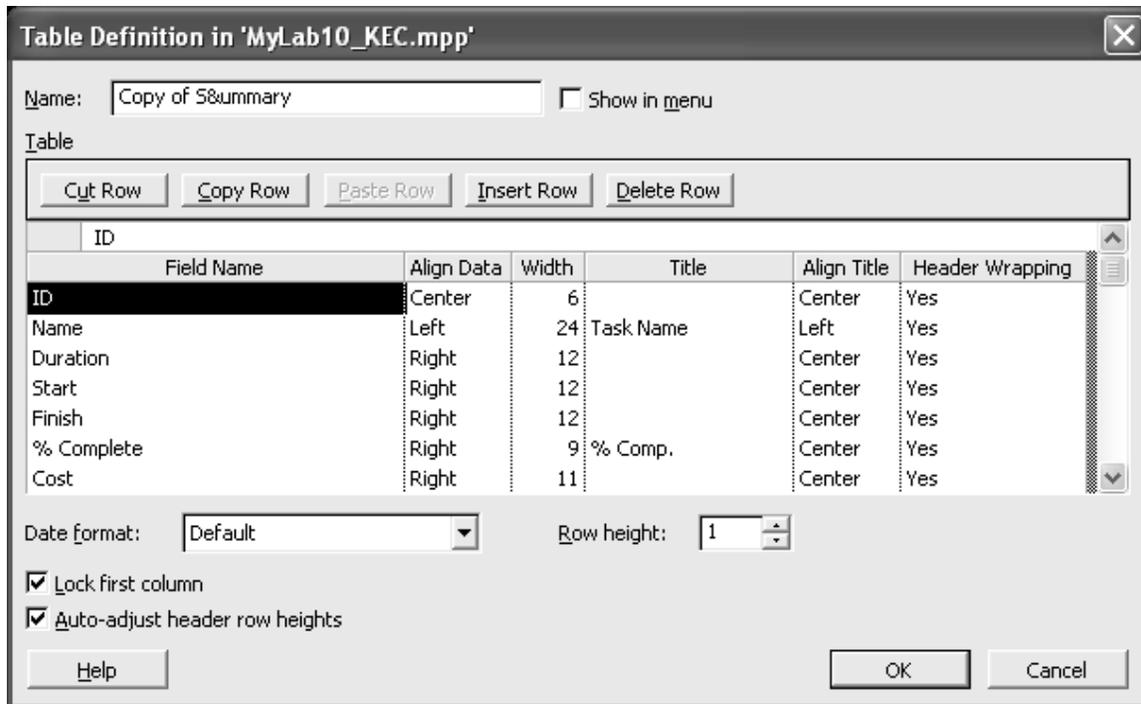


Figure 2

10. Let's say we are creating a summary table to provide to upper management, but we want to delete any non-essential information to them and yet add more essential information.
11. In the Name box, type **Management Summary**.
12. Our management is not interested in duration, finish or work information. We need to **delete** these fields/rows.
13. In the Field Name column, select (click) **Duration**. Click on **Delete Row** button at the top.
14. In the Field Name column, select **Finish**. Click on **Delete Row** Button.
15. In the Field Name column, select **Work**. Click on **Delete Row** Button. (Figure 3).

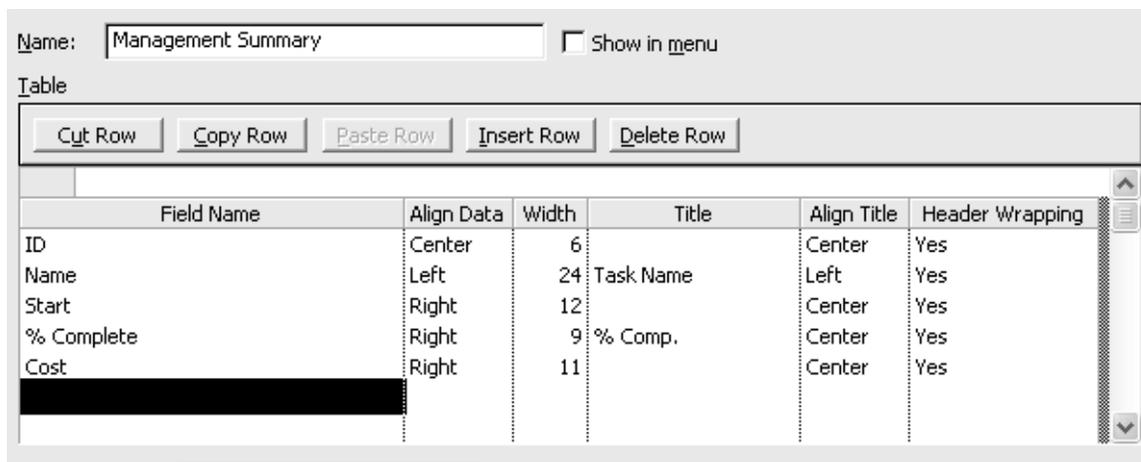


Figure 3

16. While management is interested in the current fields, it is also interested in remaining duration and in resource groups.
17. In the **Field Name** column, click (select) **Start**.
18. Click **Insert Row**.
19. Click the down arrow and select **Remaining Duration**, and then press **Tab**. The new column, Remaining Duration, is entered. Criteria for Align Data, Width, and Align Title are added by default. We will not be changing these, but it gives you an indication you can also give format instructions when you create a table.
20. Click in the **Title** field and type **Rem. Dur.** Press **Enter**.
21. Click in the **blank field** name below **Cost** and click the down arrow.
22. Click **Resource Group** and then press Tab.
23. In the **Align Data** column, click the down arrow and select **Left**.
24. In the **Width** column, enter **15** and then press Tab.

Name: Show in menu

Table

Cut Row Copy Row Paste Row Insert Row Delete Row

Field Name	Align Data	Width	Title	Align Title	Header Wrapping
ID	Center	6		Center	Yes
Name	Left	24	Task Name	Left	Yes
Remaining Duration	Right	10	Rem. Dur.	Center	Yes
Start	Right	12		Center	Yes
% Complete	Right	9	% Comp.	Center	Yes
Cost	Right	11		Center	Yes
Resource Group	Left	15		Center	Yes

Figure 4

25. Once you have completed these changes, press **OK**.
26. The More Tables box now lists this new table.
27. From the **More Tables** box and with **Management Summary** selected, click **Apply**.
28. Now this table is displayed in your Gantt view.
29. Move the Gantt chart completely off the screen and **widen** columns of this table so that all information can be read. (Management hates to guess.)
30. **Print this table** with the appropriate header information. This will be **printout 1**.

(Note: You can customize tables while in a task sheet, Gantt chart, or resource sheet view by deleting and inserting columns. However, it is not recommended. I also do not recommend editing a predefined table because, unless you remember how the original table was designed, returning to the default design has to be done using a global import. It is best to create customized tables by using the technique above or by creating a table from scratch).

Creating Custom Views

A view organizes schedule information for display and entry. There are 25+ predefined views in MS Project 2003, some of which we have been using (such as the Gantt chart view and the Resource sheet view). Do not confuse views with tables. While a table or tables may be part of a view, a view also combines a screen and a filter. In an earlier lab, we know that there are three types of views: charts or graphs, sheets (or tables with an applied filter), and forms (which usually focus on only one task or resource).

We will first create a view known as a single view:

1. You should still be in Gantt chart view with the Management Summary Table displayed.
2. From the **View** menu, click **More Views**.
3. Click **New**. The Define New View dialog box appears.

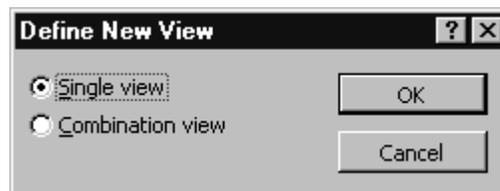


Figure 5

4. Be sure the **Single view** option is selected and click **OK**.
5. The **View Definition** dialog box appears.

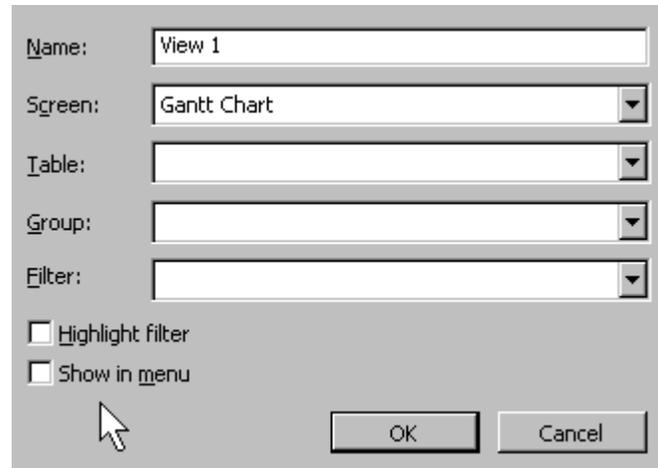


Figure 6

6. In the Name field, type **Management Task Sheet**.
7. Click the **Screen** down arrow, and select **Task Sheet**.
8. Click the **Table** down arrow and select **Management Summary**.
9. Click the **Group** down arrow and select **No Group**.
10. Click the **Filter** down arrow and select **Incomplete tasks**. (See figure 7)

Figure 7

11. Click **OK**. The “Management Task Sheet” should now be listed in the More Views dialog box.
12. Making sure the **Management Task Sheet is highlighted** in the **More Views dialog box**, press **Apply**.
13. What happened? Was there a task deleted from your view? **Which one?** (Also, why did the Gantt chart disappear?)
14. **Print this table (view)** with the appropriate header. This will be **printout 2**. (**Note:** There may be a slight problem centering the header...seems to be a bug when printing this view...try deleting the header information and start from scratch).
15. Save your file before continuing.

Now let’s create a **combination** view:

1. From the **View** menu, click **More Views** and then click **New**.
2. Select the **Combination View** option and click **OK**.
3. In the Name field, type **Management Review**.
4. Click the Top down arrow and then click **Tracking Gantt**. The Tracking Gantt view will then be displayed in the top pane.
5. Click the Bottom down arrow and select **Management Task Sheet**. The Management Task Sheet will then appear in the bottom pane. (Figure 8)

Figure 8

6. Click **OK** after verifying the data.
7. From the Views box, select **Management Review** and click **Apply**. Your screen should resemble Figure 9.

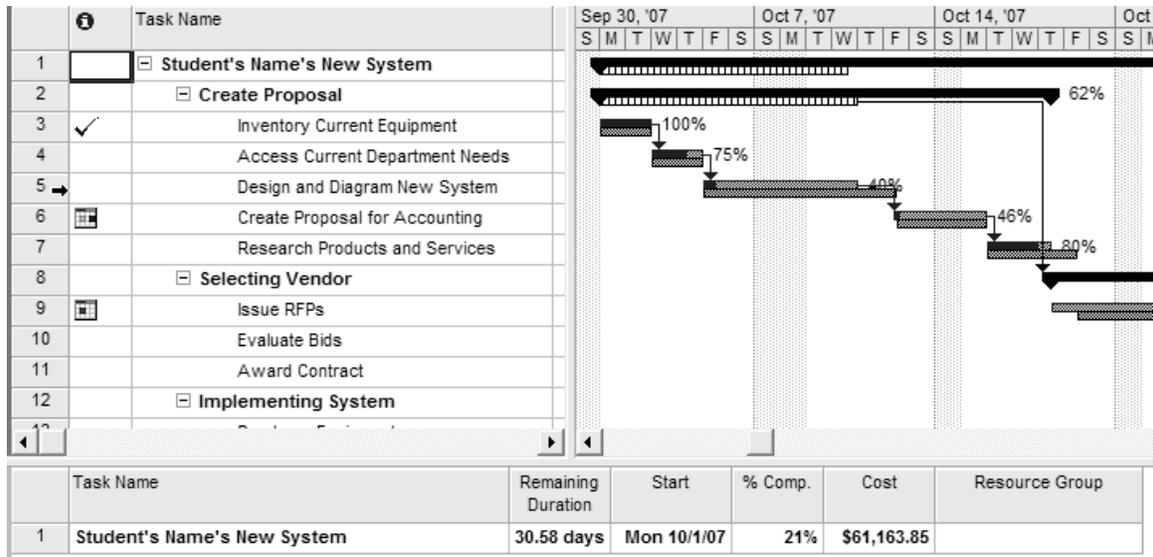


Figure 9

8. Notice there are two “panes”: the tracking Gantt at the top and the Management Task Sheet on the bottom.
9. While printing a combination view is best done using a report, you may want to find the answer to this question: **How could you find out what two views make up a combination view?**
10. Save your file.

Creating Custom Reports

Reports are used to print project information in a variety of formats or to provide information that is not displayed in a predefined table or view (such as project manager’s name or project statistics). MS Project provides 22 predefined reports in five report groups (Overview, Current Activities, Costs, Assignments, and Workload).

Reports can be created from scratch, an existing report can be edited, or a new report can be based on a report filter within certain parameters. (We have already used many of these and have changed some of these reports using different filtering criteria, such as days rather than weeks for the Task Usage report). However, it is strongly recommended that if you need to edit a predefined report, it is best to create a new report from scratch or a new report based upon a predefined report.

First, let’s preview a predefined report:

1. From the View menu, select **Reports**.
2. Double-click the **Costs** box.
3. Double-click the **Cash Flow** box.
4. The **Cash Flow report** should now be displayed in **Print Preview**.
5. Click the Cash Flow report to **zoom in**.
6. The Cash Flow report details task costs on a weekly basis. (Figure 10)

	9/30/07	10/7/07	10/14/07
Student's Name's New System			
Create Proposal			
Inventory Current Equipment	\$1,440.00		
Access Current Department Needs	\$1,658.46		
Design and Diagram New System	\$1,104.81	\$1,641.35	
Create Proposal for Accounting		\$2,400.00	\$2,400.00
Research Products and Services			\$2,400.00
Selecting Vendor			
Issue RFPs			\$8,800.00
Evaluate Bids			
Award Contract			
Implementing System			
Purchase Equipment			
Install Wiring			
Install Hardware			
Install Software			
Test System			
Project Meeting			
Total	\$4,353.27	\$4,191.35	\$13,750.00

Figure 10

- Click **Close** to exit Print Preview.
- With the Reports dialog box **still open**, double-click the **Custom** box.

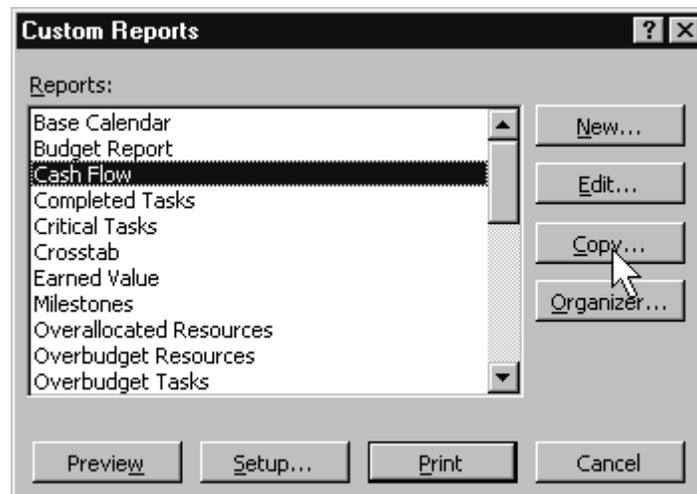


Figure 11

- From the Custom Reports dialog box, select **Cash Flow** and then click **Copy**. (Figure 11)
- The **Crosstab Report** dialog box now opens and the **Definition** tab is selected. (Figure 12)

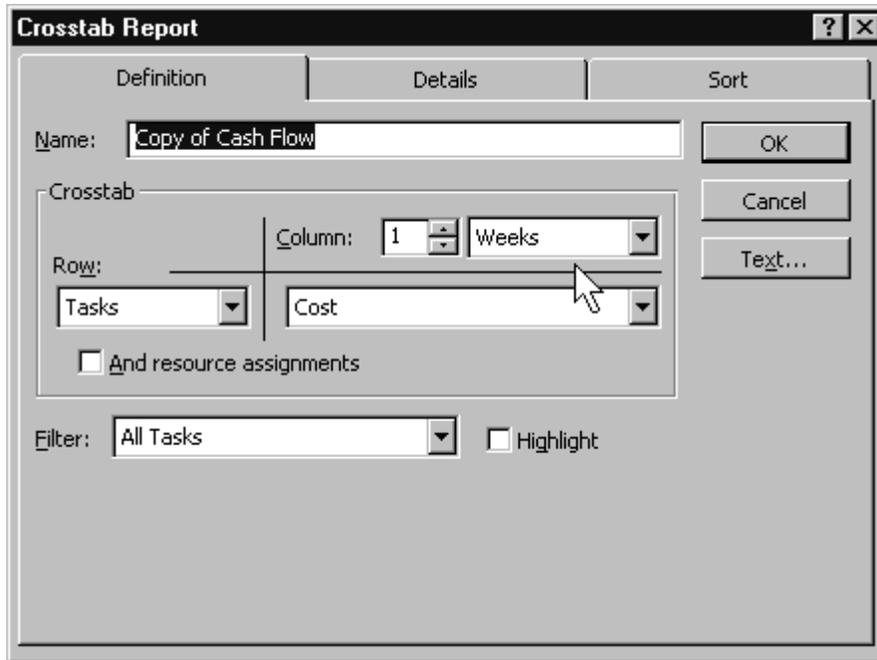


Figure 12

11. In the Name field, select the text and then type **Daily Cash Flow**.
12. Click the **second Column down arrow** and change Weeks to **Days**.
13. Click the **Details Tab**.
14. In the Show area, **uncheck** the Summary tasks check box.
15. **Check** the **Show Zero Values** check box.
16. Click the **Sort Tab**.
17. Click the **Sort By** down arrow and select **Cost**.
18. Click the **Descending** option.
19. Click **OK**. The Reports box appears again.
20. In the **Custom Reports** box, **select your Daily Cash Flow report** and then click **Preview**.

	Mon Oct 1	Tue Oct 2	Wed Oct 3
Issue RFPs	\$0.00	\$0.00	\$0.00
Evaluate Bids	\$0.00	\$0.00	\$0.00
Award Contract	\$0.00	\$0.00	\$0.00
Create Proposal for Accounting	\$0.00	\$0.00	\$0.00
Design and Diagram New System	\$0.00	\$0.00	\$0.00
Research Products and Services	\$0.00	\$0.00	\$0.00
Access Current Department Needs	\$0.00	\$100.96	\$997.50
Inventory Current Equipment	\$720.00	\$720.00	\$0.00
Install Wiring	\$0.00	\$0.00	\$0.00
Purchase Equipment	\$0.00	\$0.00	\$0.00
Install Software	\$0.00	\$0.00	\$0.00
Test System	\$0.00	\$0.00	\$0.00
Install Hardware	\$0.00	\$0.00	\$0.00
Total	\$720.00	\$820.96	\$997.50

Figure 13

21. Does your report look similar to the one in Figure 13? If not, go back and recreate this report.
22. **Print** this report (Daily Cash Flow). Be sure to include the appropriate header. This will be **printout 3**.

On Your Own

If you notice under the Current Activities group of reports there is no **Unfinished Tasks** reports. These would be those tasks that have not started and those that have started but not completed.

1. Create an **Unfinished Tasks report**, which will lists all tasks not finished or started. The information will include task name, task duration, start and finish dates, and resource assignment information.
2. **First: create a new filter** called **Unfinished Tasks** based upon a copy of the Unstarted Tasks filter.
3. Since we are combining the criteria for Unstarted Tasks filter with In Progress Task filter, you may want to see what they used for their criteria.
4. Then combine those **two** criteria in your Unfinished Task **filter**. (Need further help. Look at figure 14).

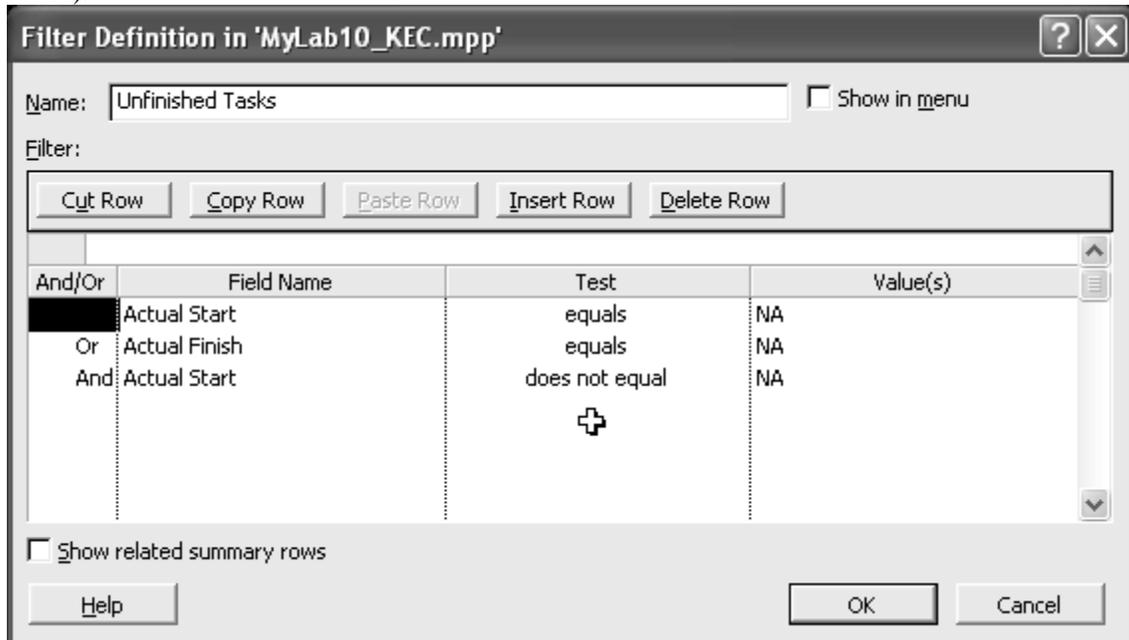


Figure 14

5. We are still not ready to create our custom report. Since we do not want the exact same information from the Entry table, we will need to specify only the task **name**, **duration**, **start**, **finish**, and **resource names** columns.
6. **Second: Create a new table**, called **Unfinished Tasks**, based upon the **Entry table**, but delete those fields you do not want based upon the last instruction above.
7. Now, you are ready to **create a Custom Report** called **Unfinished Tasks**. Can you take it from here? (This is a new **task report** – hint, hint). (Second hint: make sure the table used for this report is the Unfinished Tasks table using the Unfinished Tasks filter).
8. **Print out this report**, called Unfinished Tasks, with the proper header information. This is your **printout 4**.

This concludes your brief journey into MS Project. We have just covered the basics. There are many other features and hopefully these exercises have prepared you for future use of this software.

Review Questions

Name _____

Answer the following questions using complete sentences:

- 1) What is a table?

- 2) When you were creating the Management Summary table, what would happen if you selected the “Show In Menu” option? What would this do?

- 3) What is a view? How does it differ from a table?

- 4) How could you find out what two views make up an existing combination view?

- 5) What is a report?

Attach your four printouts, in print order, to the back of this sheet and submit by the lesson due date.