

ادارة مشاريع



جامعة
المنارة

How to Run Reports in Microsoft Project 2016

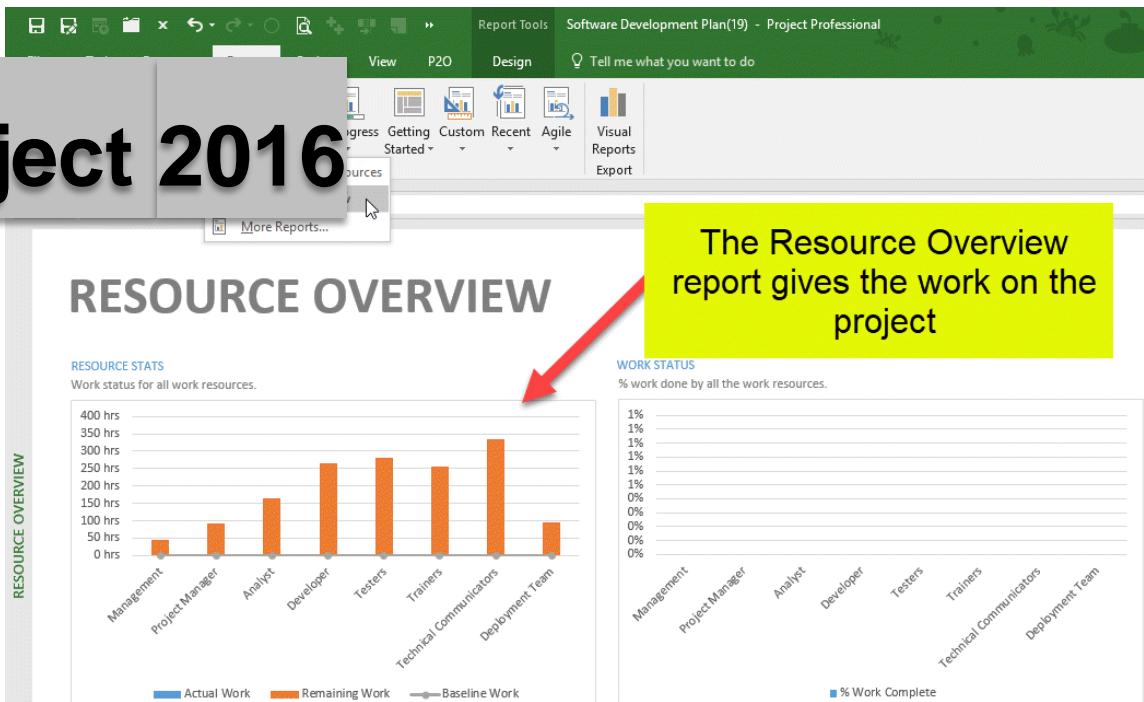
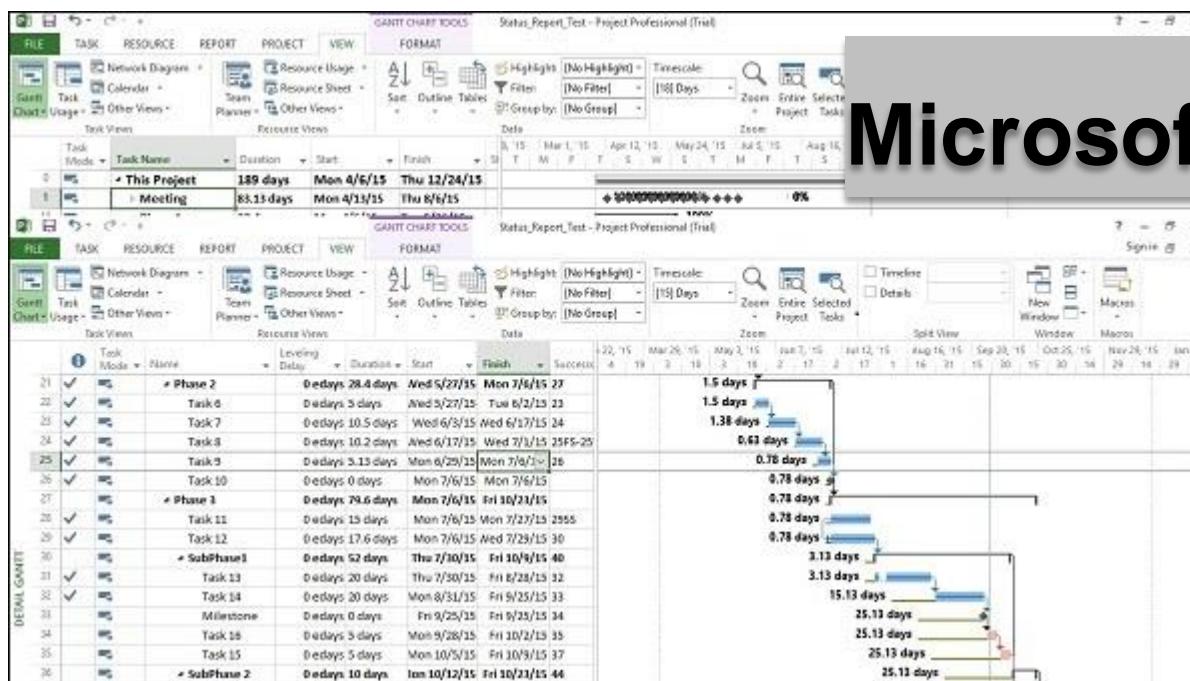
كيفية تشغيل التقارير في

Microsoft Project 2016

How to Run Reports in Microsoft Project 2016

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Microsoft Project 2016



أهمية التقارير

Reports make it easier to communicate about your project. They make it easier to show the boss exactly how great you are doing. What's more, they show how costs are accumulating, what tasks are in progress, and which ones still need to start. They show progress and give you a picture of each element of the project and the project as a whole.

تجعل التقارير من السهل التواصل في مشروعك. بالإضافة لذلك، فهي توضح كيف تراكم التكاليف، والمهام الجارية، والمهام التي لم تبدأ بعد. إنها تظهر التقدم وتعطيك صورة لكل عنصر من عناصر المشروع والمشروع ككل.

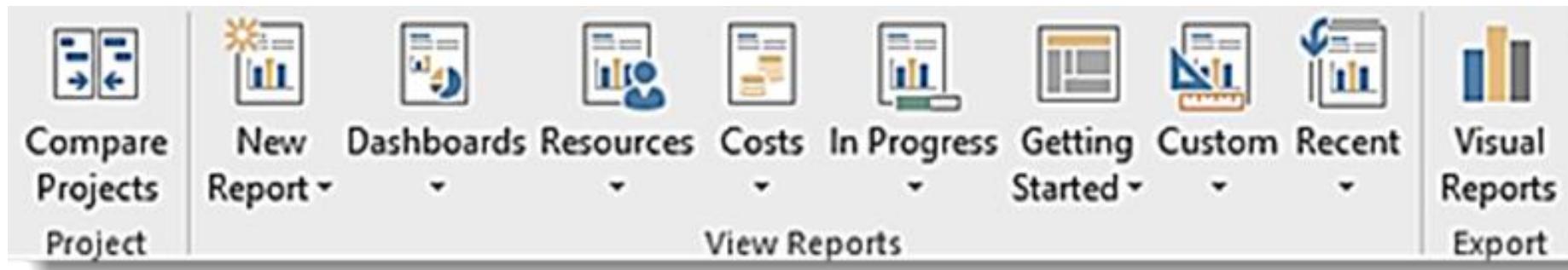
التقارير المعيارية About Standard Reports

Standard reports are predesigned reports that Project offers you. They offer a lot of choices regarding the information you can add, so at the same time that we say they're predesigned, they're also customizable.

You can choose the format for standard reports, such as a table, chart, or comparison report. Some let you choose the orientation (landscape or portrait). In addition, you can also customize standard reports by changing their name, the periods they cover, the table of information, and the filters. You can also add themes, formatting, images, and shapes to standard reports.

التقارير المعيارية هي تقارير مصممة مسبقاً يقدمها لك Project. إنها توفر الكثير من الخيارات فيما يتعلق بالمعلومات التي يمكنك إضافتها، لذلك في نفس الوقت الذي نقول فيه إنها مصممة مسبقاً، فهي أيضاً قابلة للتخصيص.

يمكنك اختيار تنسيق التقارير المعيارية، مثل جدول أو مخطط أو تقرير مقارنة. يتيح لك البعض اختيار الاتجاه (أفقي أو عمودي). بالإضافة إلى ذلك، يمكنك أيضاً تخصيص التقارير المعيارية عن طريق تغيير أسمائها والفترات التي تغطيها وجدول المعلومات والمرشحات. يمكنك أيضاً إضافة سمات وتنسيقات وصور وأشكال إلى التقارير المعيارية.



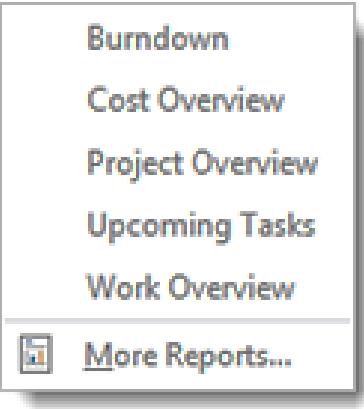
There are four standard report categories:

1. Dashboard
2. Resources
3. Costs
4. In progress

Each category contains several reports.

About Dashboard Reports

Pictured below is the different standard reports for the Resources Category



Dashboard reports are new to Project 2016. There are five dashboard reports:

- Burndown
- Cost Overview
- Project Overview
- Upcoming Tasks
- Work Overview

To run a dashboard report, click the Dashboard dropdown arrow (under the Report tab), then select which report you want.

We are going to choose Burndown.

This report is used to compare baseline work remaining to amount of work remaining and the number of tasks remaining compared with baseline tasks remaining. This helps you to see whether you are working at the pace you planned or if you are in danger of falling behind.

يتم استخدام هذا التقرير لمقارنة العمل المتبقي (Baseline work remaining) مع مقدار العمل المتبقي وعدد المهام المتبقية مقارنة بمهام الأساس المتبقية. يساعدك هذا في معرفة ما إذا كنت تعمل بالسرعة التي خططت لها أو إذا كنت في خطر التخلف عن الخطة.

Pictured below is the different standard reports for the Resources Category

File Task Resource Report Project View Help Report Tools

Project1 - Project Professional

Jamal Omran JO

Report Design

Compare Projects

New Dashboards Resources Costs In Progress Getting Started Custom Recent Recent Export

Start 1/11/22

Finish 1/11/22

Timeline

OVERALLOCATED RESOURCES

WORK STATUS

Work status for overallocated resources.

1 hrs
1 hrs
1 hrs
1 hrs
1 hrs
1 hrs
0 hrs
0 hrs
0 hrs
0 hrs

0 hrs 0 hrs

Actual Work Remaining Work

OVERALLOCATION

Surplus work assigned to overallocated resources. To resolve overallocations use [Team Planner View](#)

1 hrs
1 hrs
1 hrs
1 hrs
1 hrs
1 hrs
0 hrs
0 hrs
0 hrs
0 hrs

1/11/22

Overallocation

Ready New Tasks : Manually Scheduled

Type here to search

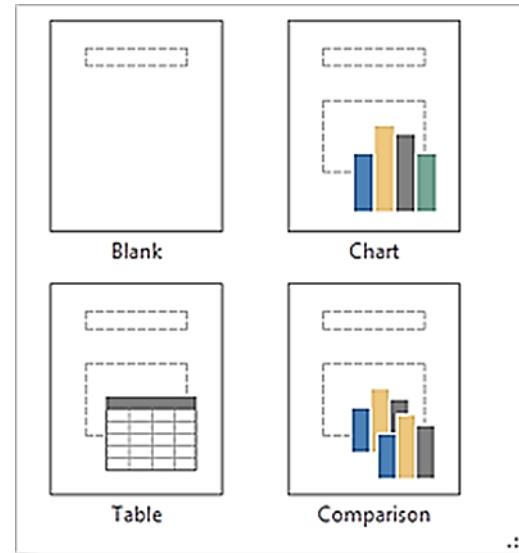
5:40 PM 1/11/2022 ENG

Creating a New Report

إنشاء تقرير جديد

If you can't find the standard report that covers what you need, you can also create a new report. To do this, go to click the New Report dropdown arrow under the Report tab. You will then see this dropdown menu:

إذا لم تتمكن من العثور على التقرير القياسي الذي يغطي ما تحتاج إليه ، يمكنك أيضًا إنشاء تقرير جديد.
للقيام بذلك ، انتقل إلى النقر فوق سهم القائمة المنسدلة "تقرير جديد" ضمن علامة التبويب "تقرير".
سترى بعد ذلك القائمة المنسدلة:



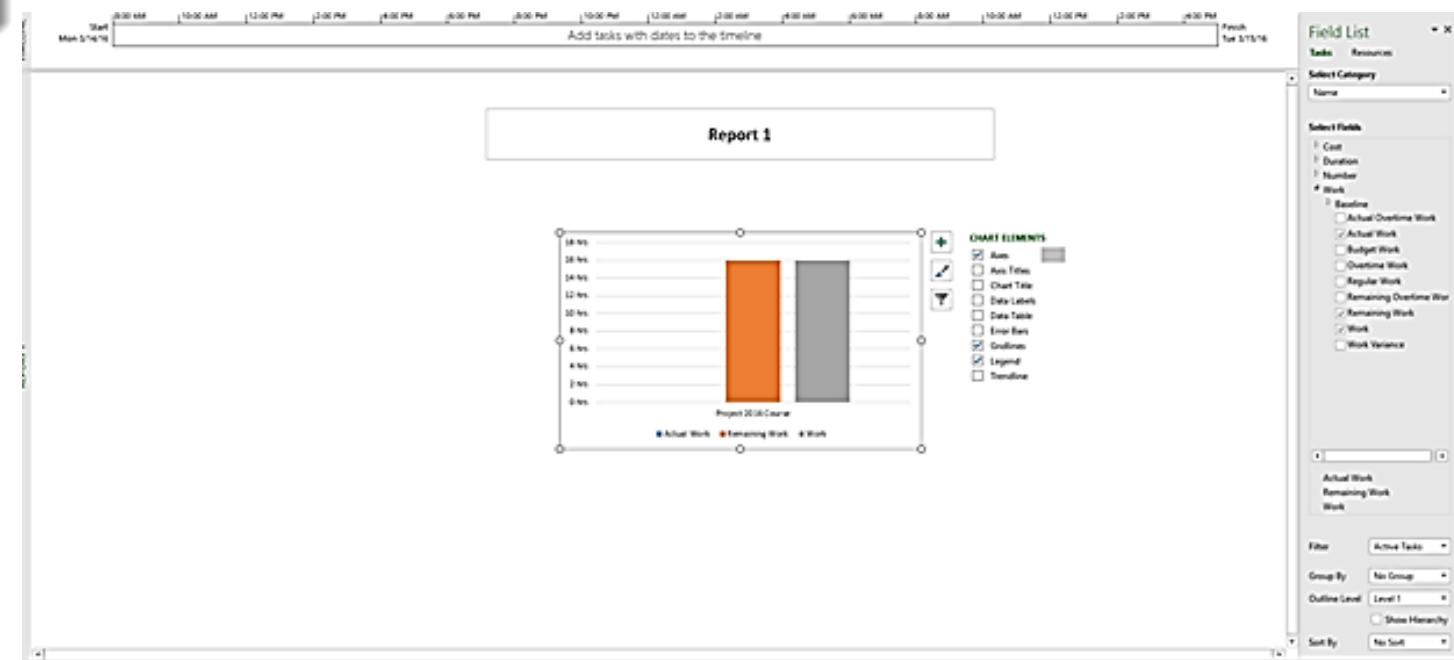
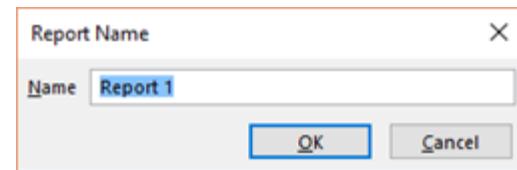
Creating a New Report

إنشاء تقرير جديد

Choose if you want a blank, chart, table, or comparison report.

We are going to choose chart.

Enter a name for the report, then click OK.



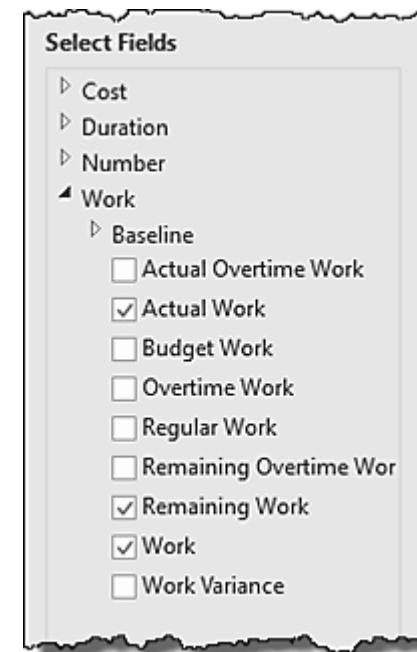
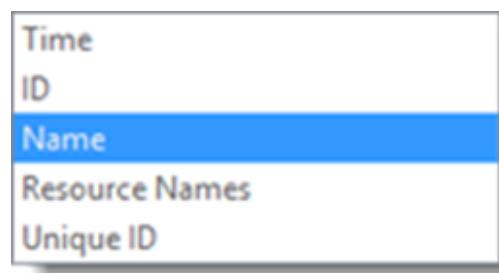
You will now see this split window:

Creating a New Report

إنشاء تقرير جديد

Your report is on the left. On the right is the Field List pane where you can choose fields for your report.

Go to the Select Category section in the Field List pane. Here you can choose Time, ID, Name, Resource Names, and Unique ID.



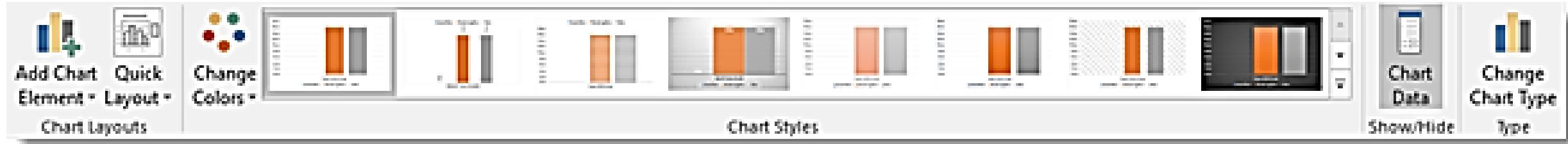
Next, go to the Select Fields category and chose the fields you want in your report by checking the boxes.

Customizing a Standard Report

We can also customize standard reports. There are three categories that you can edit or modify in a standard report. These three categories are:

- 1. Definition.** The definition includes the name of the report, the time period for the report, the table of information, any filters that you've applied, and whether or not you want your summary of tasks to appear.
- 2. Details.** You can also include details for tasks such as task notes and predecessors. Details for resource assignments, notes, and cost can also be included. What's more, you can show tools, add a border, or place gridlines between the details of the report.
- 3. Sort.** Project allows you to sort by three criteria in ascending or descending order.

Customizing a Standard Report



Once you create a report in Project 2016, a new tab will appear on the ribbon. This is the Report Tools Design tab.

Using the tools in this tab, you can customize your standard report by adding a theme, changing the font, adding effects, etc. You can also add images, shapes, and text box. What's more, you can add page breaks, adjust the margins, and set the orientation or paper size.

These are all tools common to all Microsoft Office products. We can be almost 99.9% sure that if you are using Project 2016, you have also used other Office products and are familiar with these tools.

That said, instead of covering how to use these tools, we are going to cover three important guidelines for customizing and formatting your reports.

Customizing a Standard Report

1. Unlike with a Word document, you can't add graphics wherever you want. They can only be added to the chart pane of Gantt Chart view, a task note, a resource note, or a header, footer or legend in reports.
2. Data in a chart can be formatted by double clicking on a chart section. When you do this, a Chart Tools Design tab appears and also a Format Plot area pane on the right side.
3. Move or resize any item in a report by clicking it, then moving it or resizing it.

Creating Visual Reports

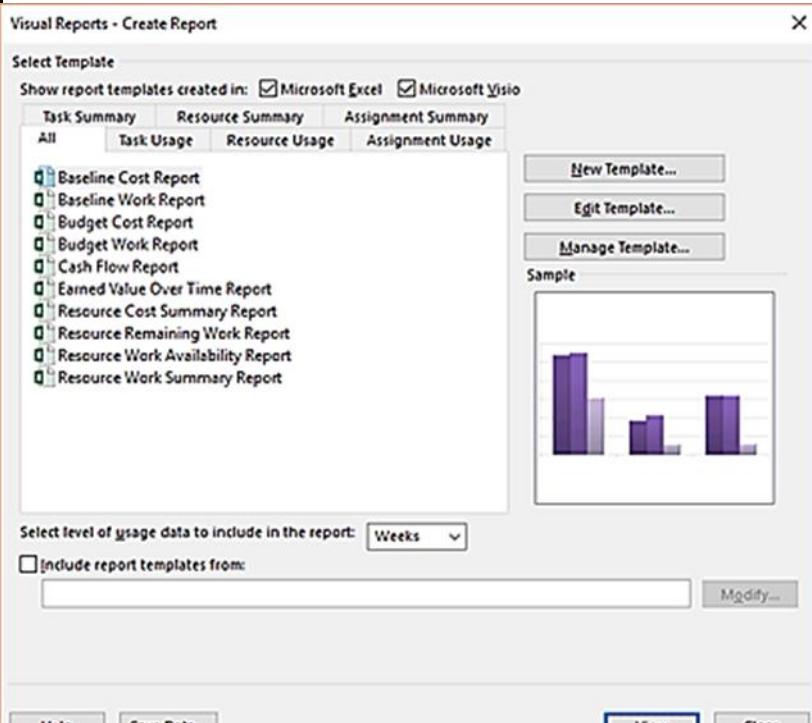
Visual reports are a lot like Pivot tables in Excel. They allow you to view data from different perspectives beyond the standard report capabilities. These perspectives are very useful for data analysis.

Project offers you six categories of Visual reports. Some of these are based on time phased data, or data distributed over time, and some are not. These categories are:

- **Task Usage.** This is based on time phased data for tasks and shows you cash flow and earned value over time.
- **Resource Usage.** This is based on time phased resource data and shows you resource availability, costs, and work data.
- **Assignment Usage.** This is also time phased data that shows baseline versus actual costs and baseline versus actual work.
- **Task Summary, Resource Summary, and Assignment Summary.** These provide diagram views of work and cost data. They are not time phased.

Creating a Visual report is easy.

- To create and generate a Visual report, go to the Report tab, then click the Visual Reports button.
- The Visual reports dialogue box now appears, as shown in the next snapshot.



Select if you want the report template created in Excel or Visio, then select the report you want to view. Click the View button. Your report will then be generated in either Visio or Excel, depending on which one you chose.

Save or convert to PDF or XPS in Project desktop

To export or save as PDF, in your Project file, on the File menu, click Export or Save As. To see step-by-step instructions,

On the File tab, choose Save As.

To see the Save As dialog box in Project 2016, you have to choose a location and folder.

In the File Name box, enter a name for the file, if you haven't already.

In the Save as type list, select PDF Files (*.pdf) or XPS Files (*.xps), and then choose Save.

Save or convert to PDF or XPS in Project desktop

- **Portable Document Format (PDF)** preserves document formatting and enables file sharing. When the PDF format file is viewed online or printed, it retains the format that you intended. The PDF format is also useful for documents that will be reproduced using commercial printing methods. PDF is accepted as a valid format by many agencies and organizations, and viewers are available on a wider variety of platforms than XPS.
- **XML Paper Specification (XPS)** is an electronic file format that preserves document formatting and enables file sharing. The XPS format ensures that when the file is viewed online or printed, it retains exactly the format that you intended, and that data in the file cannot be easily changed.

Save as XPS

Sometimes you want to save files so they can't be changed, but you still want them to be easy to share and print. With Microsoft Office programs you can save files as XML Paper Specification (XPS) without needing additional software or add-ins.

XPS files are good to use when file that:

- Looks the same on most computers
- Has a small file size
- Complies with an industry format

Some examples of when to use XPS files include resumes, legal documents, newsletters, files intended to only be read and printed, documents intended for professional printing.

You can also save your file in PDF format to get the same results.