

# Automate Your Status Reports with Project Online

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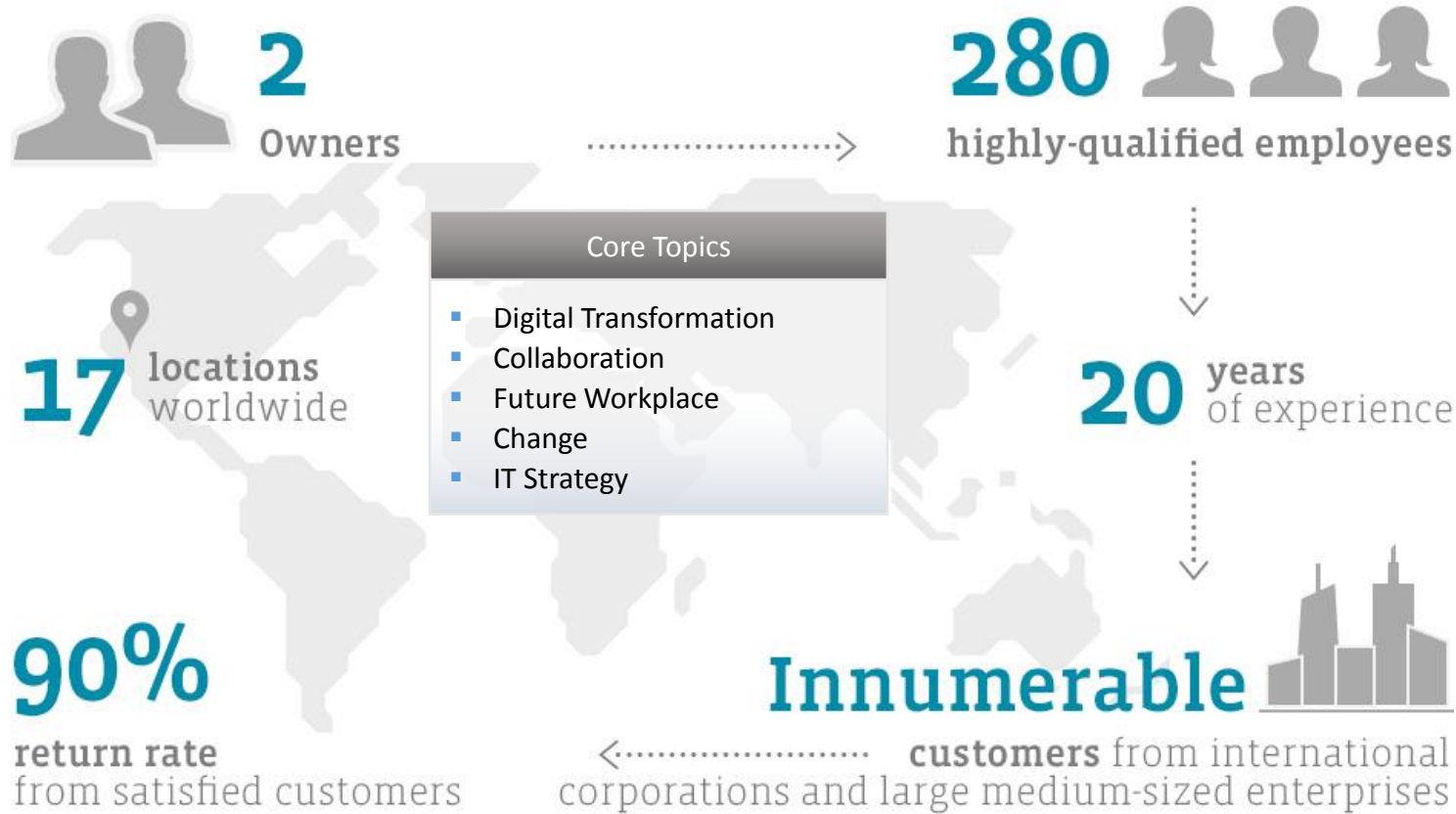


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# Roles in the status report process.

The monthly report process requires at certain amount of time from at least 3 roles.

## Project managers



Consolidate project status in a report

## Project management office (PMO)



Monitor status report creation and align them

## Steering committee & management



Control project status and derive decisions

# Main pain points.

Automation can reduce efforts and streamline reporting.



How can I reduce the amount of work to create the monthly Status Report?



How can I ensure a easy consolidation on portfolio level and align reports?

# Automate your status report.

Use standard means to improve the reporting experience for everyone.



Task Name	% Complete	2015	4/27/2015	5/4/2015	5/11/2015	5/18/2015
		W T F S	S M T W T F S	S M T W T F S	S M T W T F S	S M T W T F S
<b>Initiate</b>	<b>100%</b>					
Clarify project scope	100%					
Define Project Manager	100%					
Sign project contract	100%					
Gate 0: Project Kick-off	100%					
<b>Plan</b>	<b>65%</b>					
<b>Analyse</b>	<b>100%</b>					
Prepare project start and execute kick off	100%					
Deliverable: Kick off workshop	100%					
Analyse system landscape and plan system	100%					
Deliverable: Compact Infrastructure Design	100%					
<b>Design</b>	<b>39%</b>					
Prepare and execute design workshop	100%					
Create functional design incl. customer sp	25%					
Deliverable: Compact Functional Design	0%					
Approve functional design (customer)	0%					
Gate 1: Design Approval	0%					
<b>Build</b>	<b>0%</b>					
<b>Implement</b>	<b>0%</b>					
Setup system including documentation	0%					

Quantitative data from project schedule

Office 365 | Projects

Project Web App

## Project Status

Project Online Setup

Project Details CS

Schedule

Project Status

CS Status Reporting

Project Site

Projects

Workflow Approvals

Approvals

Tasks

Resources

**Status:** Checked-in **Last Modified:** 6/11/2015 6:51

### Project Status Update

Project Status: Green

Project Site: Campaña & Schott Best Practice Suite: Manual field to be set by the project manager. Defines the project status (red/ yellow/ green).

Progress: We are advancing as expected by obtaining a trial tenant

Next Steps: Setup the feature evaluation roadmap

Decisions: When will we buy the licenses?

Qualitative data from project detail pages

### Project Status Report

9/24/2015

Project Online Setup

Project Description

The aim is to get Project Online functional for managing our projects

Kevin Turner	4/23/2015	7/20/2015	-66	23%	Green
Project Sponsor	Start	Finish	Remaining days	% duration complete	Overall status
DemoA-User	1408 h	366 h	1050 h	26%	Low
Project Manager	Baseline work	Actual work	Remaining work	% work complete	Risk rating

Progress

We are advancing as expected by obtaining a trial tenant

Next Steps

Setup the feature evaluation roadmap

Decisions

When will we buy the licenses?

0%	1%	-53%
Variance Finish	Variance Work	Variance Cost

Status Report embedded in the Project Detail Page

# Step 1.

Setup metadata and PDP.

## Create metadata fields

- Status indicators (calculated or manual)
- Comment fields

## Create new Project Detail Pages (PDP)

- List fields required for the report
- Display report

## Add PDP to projects

- Add the PDP to your Enterprise Project Types or workflow stages

# Step 2.

Create Excel report.

## Setup data source(s)

- Add Project Server Odata feeds as tables to your Excel
- (Optional) “Auto-refresh on opening”

## Create consolidation sheet

- Create a consolidation sheet to obtain input from various sources
- Add a pivot table and slicer for the UIDs and make it available as input parameter for Excel Services

## Design a beautiful report page

- Based on the consolidation sheet create a report sheet using the power of Excel

# Step 3.

## Embed report in PDP.

### Upload Excel Report

- Upload your Excel sheet to Project Online
- Set properties for Excel Online

### Add web parts

- Add an Excel web part
- Add an URL Filter web part

### Configure web parts

- Map Excel web part to Excel report
- Map URL filter to “projuid” GET variable and connect it to the externally available slicer in the Excel web part



## Step 4.

Establish reporting process.

### Determine and communicate process

- Update intervals of report information
- Inform and train users
- Manual historization required?

### Control and follow-up

- Use the “Last published” information to keep track of “stale” data
- Ensure reports are read and acted upon by management

# CS Status Reporting.

A quick overview.

## At a glance



**Project trend analysis**  
High data quality



**Status reports without having to manually build presentations**



**Automatically aggregated data**  
Easily created from definable data sources



**Easy created reporting**  
Create standardized reports with one click



**Standardized project and management reports**  
Clear, intuitive, efficient



**Solid basis for decisions**  
Historicized reports and milestone trend analysis



# Summary.

## Status reporting can be set up out-of-the-box

- Excel as out-of-the-box reporting tool
- Use the data that is already in your Project Online instance

## Support the reporting process

- Ensure data quality
- Act on reports

## Historization and other data sources need an add-in

- CS Status Reporting can help you to fill the gaps

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**Thank you.**

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