



# Creating Custom Dashboards in MS Project Pro 2016

Presented by Laura Crawford  
December 7, 2017

# Upcoming PPM Works Events

Date and Time	Webinar Topic
12/7/17 12 PM EST	Creating Custom Dashboards in Project Professional 2016
1/11/18 12 PM EST	Create Custom Tables and Views in Project Professional
1/25/18 12 PM EST	Best Practices for SharePoint Project Site Template Development

Please visit [www.ppmworks.com/events](http://www.ppmworks.com/events) to view our full event list!

Hope to see you there

# Laura Crawford



## Senior PPM Specialist

Laura has over 7 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.



# Why PPM Works

- **Gold Microsoft Certified Partner** exclusively focused on **Microsoft Project, SharePoint, and Office 365**
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Shire, Synopsys and many more...



- We believe in **partnering** with you, **exceeding expectations** to build **long lasting success**.
- Our team's experience runs deep with Microsoft.
  - Over **225 Project Server implementations** and Trained **thousands** of students
  - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
  - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference



# Why Clients Choose PPM Works

**Our Philosophy:** We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1<sup>st</sup>
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.

Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all

Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.

Sr. Project Manager Consultant, Large Legal Firm

# Learning Objectives

In this informative session we will show you the new robust reporting capabilities in Project Pro 2016.

At the end of today's session you will be able to:

- Edit existing reports
- Create custom dashboards and reports
- Leverage the Organizer to share reports with your team
- Get started right away in creating new reports that will help your whole organization

# Agenda

**Introduction**

**Overview of New Reports**

**Editing Existing Reports**

**Creating a New Report**

**Creating a New Dashboard**

**Leveraging the Organizer**

**Question and Answer**

# Session Goals

## Improve Custom Reporting

Tips and Tricks for both New or Mature Organizations

## Equip You to Get Started Today

Quick Reference on Steps to Get Started

## Make the Most of Your Time

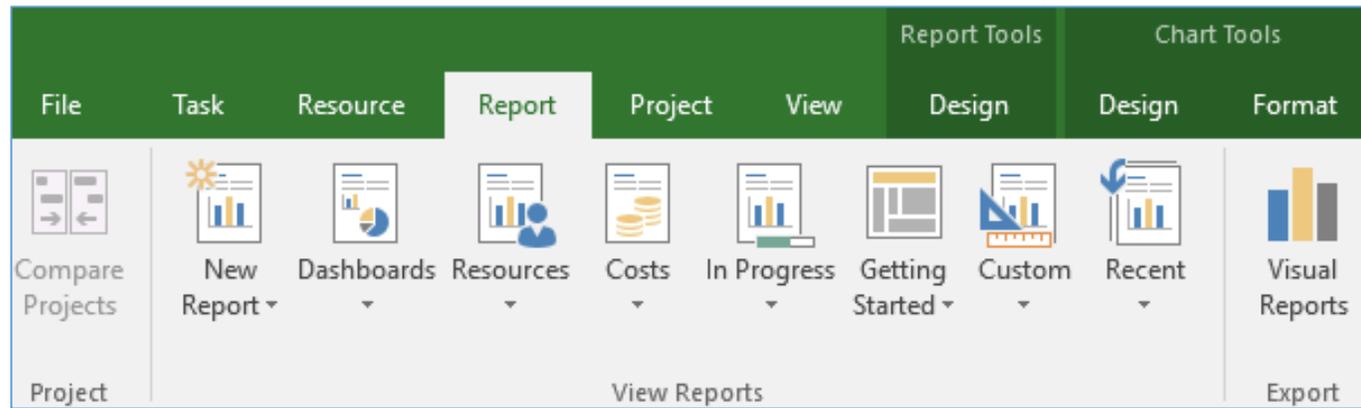
Fast-pace, Condensed Content with Time for Question and Answer



# Overview of New Reports in Project Pro 2016

# Project Pro Reports

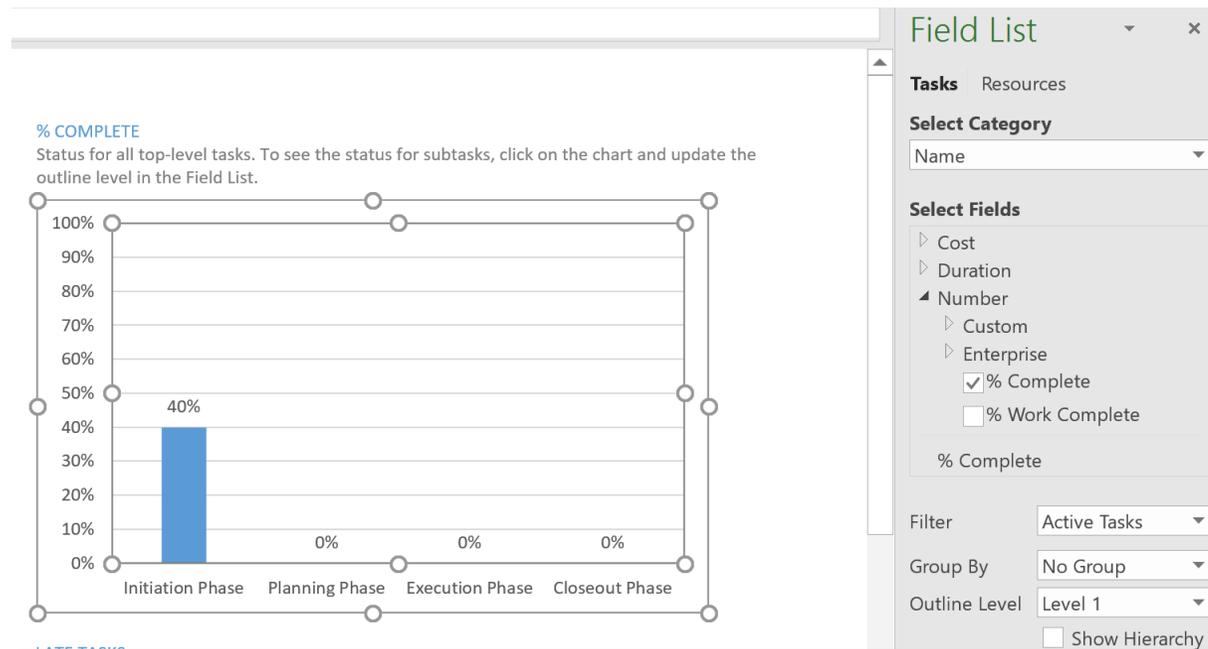
Within Project you can create and customize graphical reports using project data. As your project is updated the reports change to reflect your most recent changes.



# Editing Existing Reports

You can change the data that is displayed in any of the existing reports.

- Click the table or chart you wish to modify
- Use the Field List pane that appears to the right to select fields and filter information



# Editing Existing Reports

Note the 3 buttons that pop up when you click on a chart or table

- Chart Elements – add or remove chart elements such as title, legend, gridlines, and data labels
- Chart Styles – set the style and color scheme
- Chart Filters – edit what data points and names are visible



# Creating New Reports

Any of the charts you create from scratch are fully customizable. You can add and delete elements and change the data to meet your needs.

- Click **Report | New Report**
- Pick one of the 4 options and click **Select**
- Give your report a name

**Blank** – creates a blank canvas

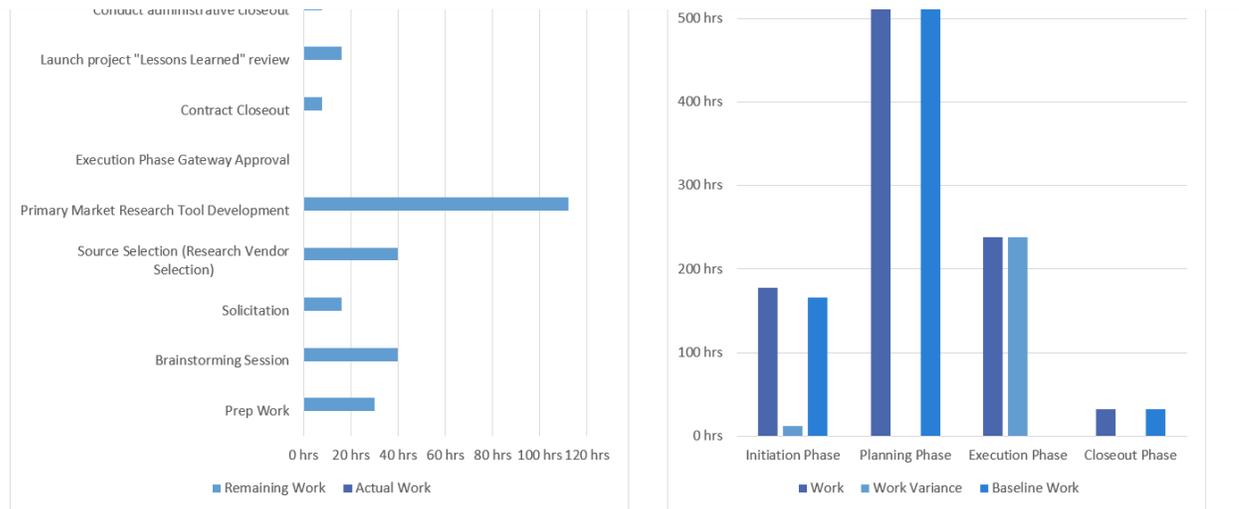
**Chart** – creates a chart comparing Actual Work, Remaining Work and Work by default

**Table** – use the Field List to select choose the fields (Name, Start, Finish, and % Complete appear by default)

**Comparison** – sets 2 charts side-by-side

# Creating New Reports

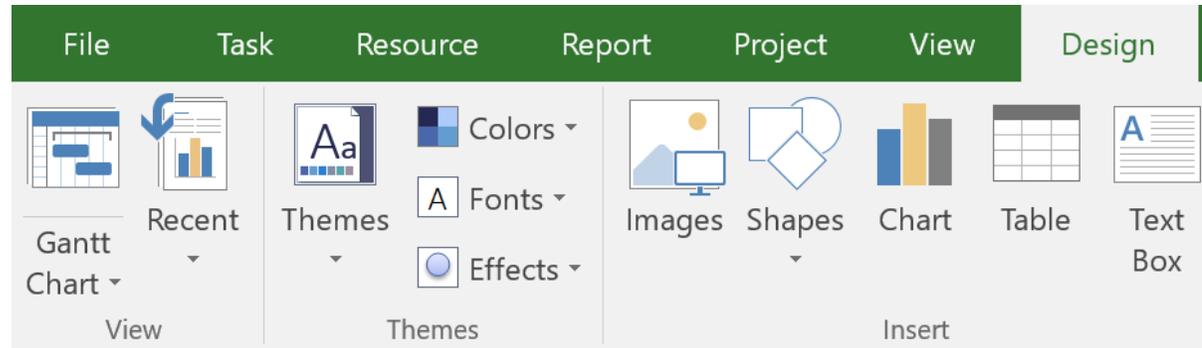
- Any of the charts are fully customizable
- Add and delete elements as needed
- Change the theme, font and effects



Name	% Complete	Start	Finish	Baseline Start	Baseline Finish
Project Management Workplan	7%	Tue 10/3/17	Fri 3/16/18	Tue 10/3/17	Fri 3/16/18

# Creating New Dashboards

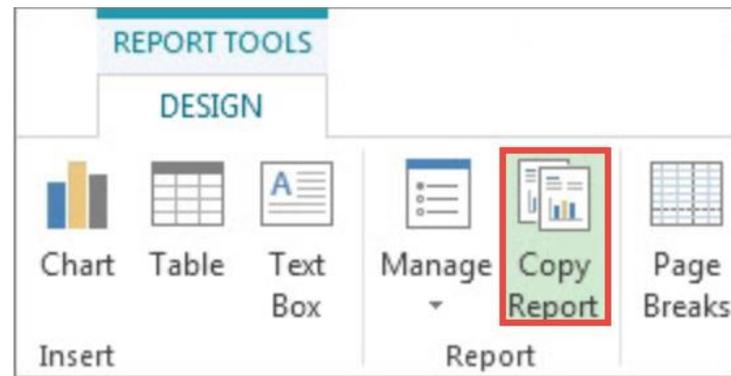
- Add additional charts and tables



# Copying Reports

Reports can easily be shared.

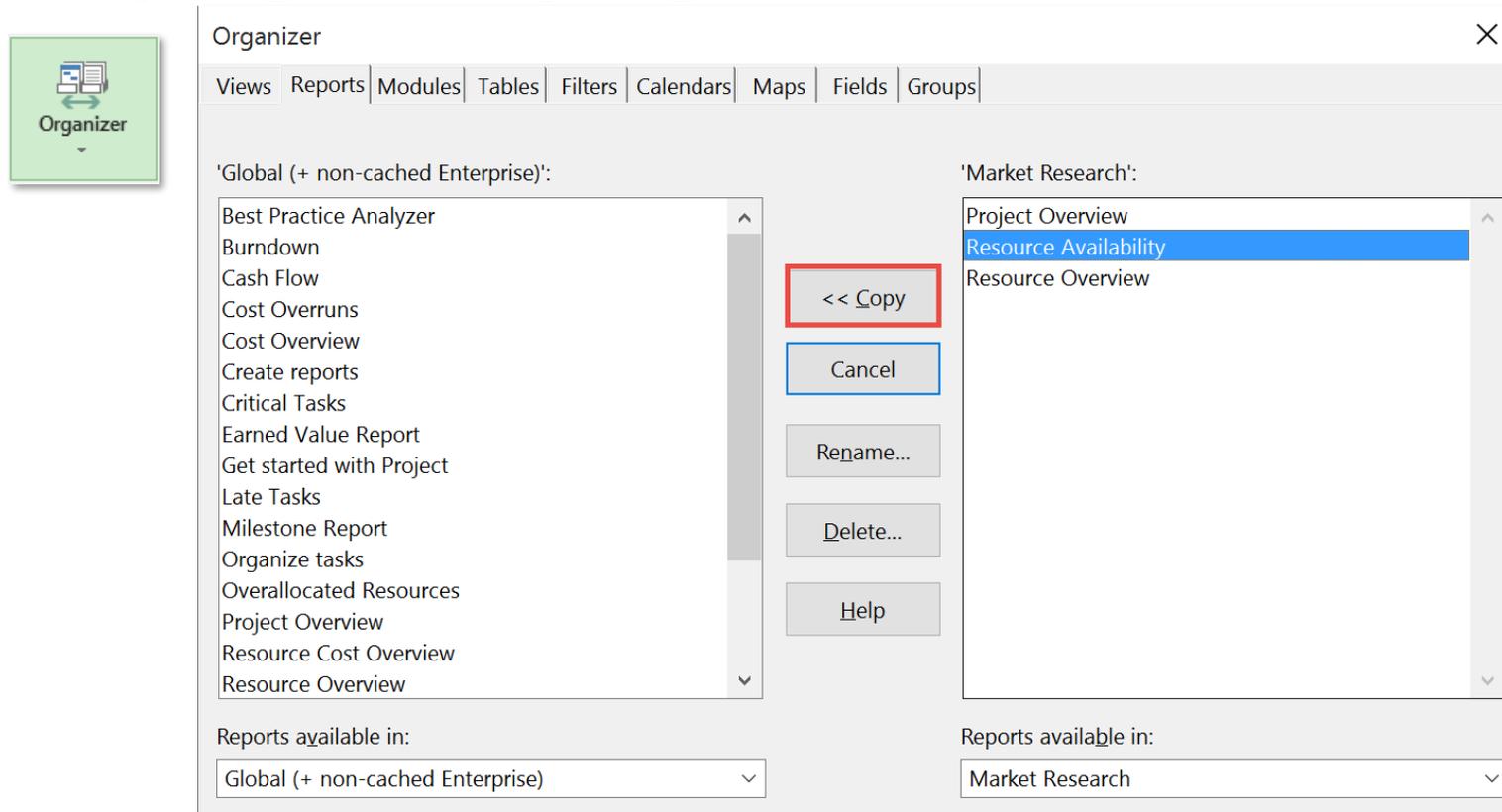
- Click anywhere on the report
- Click **Report Tools | Design | Copy Report**
- Paste the report to any application that supports graphics



# Leveraging the Organizer

The Organizer can be used to copy reports from project to project.

- **File | Info | Organizer | Organizer**



# Question and Answer



# Call to Action

**1. Get started today and contact us** at  
[info@ppmworks.com](mailto:info@ppmworks.com)

Link in: Laura Crawford Senior PPM Specialist with PPM Works  
[www.linkedin.com/company/ppm-works-inc/](https://www.linkedin.com/company/ppm-works-inc/)

**2. Register for a Tips and Tricks or Immersion Session**

[info@ppmworks.com](mailto:info@ppmworks.com)

**3. Register your PDUs**

# PDU's for this Webinar

PPM Works is a PMI® Registered Education Provider (R.E.P.). We offer PDU's for this presentation. To claim your PDU please email **info@ppmworks.com** with your PMI number and reference this presentation.

# Contact Us

**We'd Love to Hear From You, Get In Touch With Us!**

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