

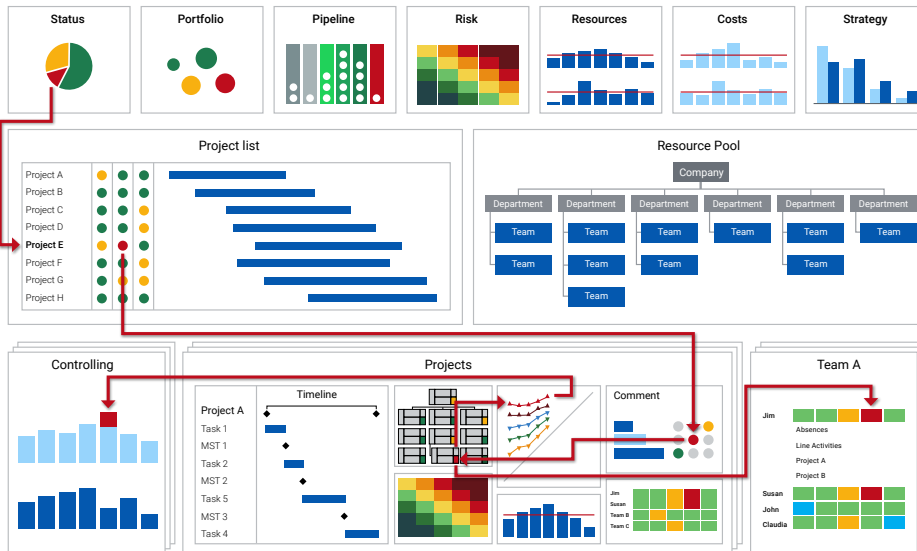
# Microsoft Project Reports Automation

Reports for Informed Decisions in the Project Environment at the Push of a Button

## Extract Vital Project Management Information for Reports from Large Amounts of Data

The reporting process is the backbone of project control. It systematizes regular communication within projects. Automated project reports provide a repeatable format for populating reports with data at the push of a button. They enable the efficient support of the entire project life cycle and optimal control of projects. Standardized reports lay the foundations that provide an overview of the evolution of the reporting data.

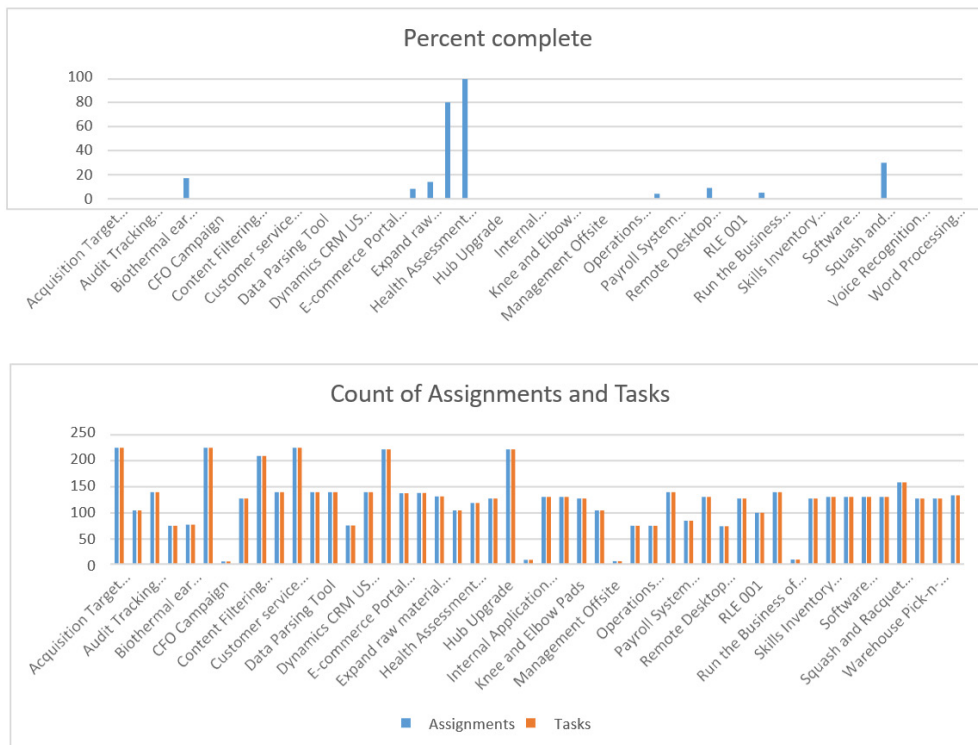
It is important to ensure the reporting is in line with the processes and the organization of the individual company: different roles, such as project team, project managers, resource providers or heads of department, portfolio decision-makers or management, also require different reports. Microsoft based technology provides several important tools for the project environment.



Integrated reporting for up-to-date project management-based decisions

### Out-of-the-Box Reports in Project Online

Out of the box, the cloud version of Microsoft Project Server – Project Online – provides only two reports in Excel: all projects and all resources. Both project and resource reports cannot be filtered or sorted. Equally, both lack of the evolution-over-time perspective. This makes working with them ineffective. Both reports are not very meaningful and would not be sufficient for most companies. This is why Microsoft provides additional reports based on Power BI.



Out-of-the-box reports in Project Online: Example of a project report



## TPG Power BI ReportPack: Wide Range of PM Reports

TPG The Project Group has the ability to complement the customer’s existing Project Online / Project Server environment. Removing limitations and enabling the additional reports is made possible with the TPG Power BI ReportPack. The additions include:

- ▶ Enterprise fields with lists of values for projects and resources
- ▶ Assigning projects to a program and a portfolio
- ▶ Functional enhancement with a SharePoint list for project requests with dedicated report

Note for existing customers: Customers who have TPG QuickStart – the turnkey solution for Project Online and Project Server introduction – can acquire the TPG ReportPack with an upgrade package.



### YOUR BENEFITS

#### Greatly enhanced reports for Project Online & Project Server provide:

- ▶ Time-savings thanks to automated report creation at the push of a button
- ▶ A comprehensive and reliable reporting process
- ▶ An optimum overview due to filters and options that enable the drill-down from an overview to the details
- ▶ Option to filter as necessary, both at field level and by clicking on the visualizations within the reports
- ▶ Shorter reporting cycles through automatic report refreshes
- ▶ Well-founded decision-making information based on data that is current and derived from diverse systems
- ▶ Improved response time when project developments require a timely response

## TPG Power BI ReportPack “Professional” and “Enterprise”

There are two versions of the TPG Power BI ReportPack: “Professional” and “Enterprise”. The two versions differ in terms of scope and data presented.

- ▶ **TPG Power BI ReportPack Professional:** 22 reports using all data from projects, programs and resources as well as the standard contents “Risks” and “Problems” from the Project website in SharePoint
- ▶ **TPG Power BI ReportPack Enterprise:** this version contains 25 additional reports. It draws on additional data from the Project websites, for instance for the below reports respectively available at project and portfolio level\*:

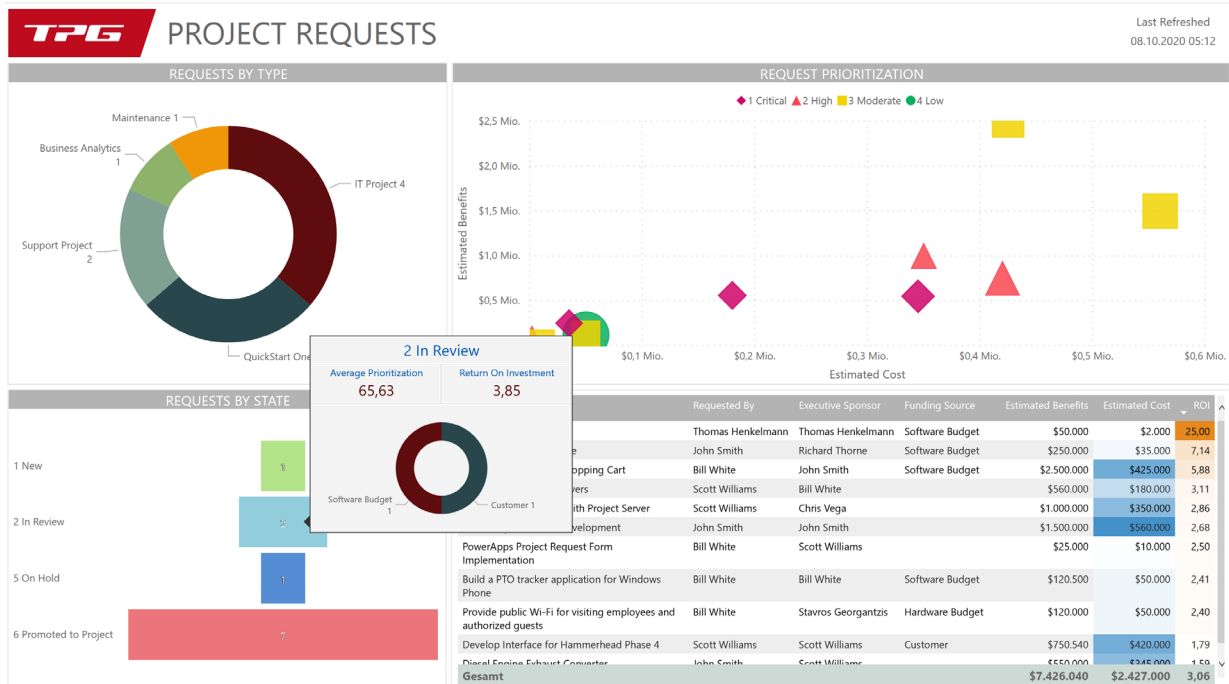
- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Prioritization and Status of project requests</li> <li>• Status reports (past and present)</li> <li>• Stakeholder analysis</li> <li>• Project benefits</li> <li>• Project goals</li> <li>• Requirements</li> </ul> | <ul style="list-style-type: none"> <li>• Project life cycle report</li> <li>• Lessons learned</li> <li>• Change requests</li> <li>• Action items</li> <li>• Decisions</li> <li>• Financials</li> </ul> |
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## Exporting Power BI Reports to PowerPoint and PDF

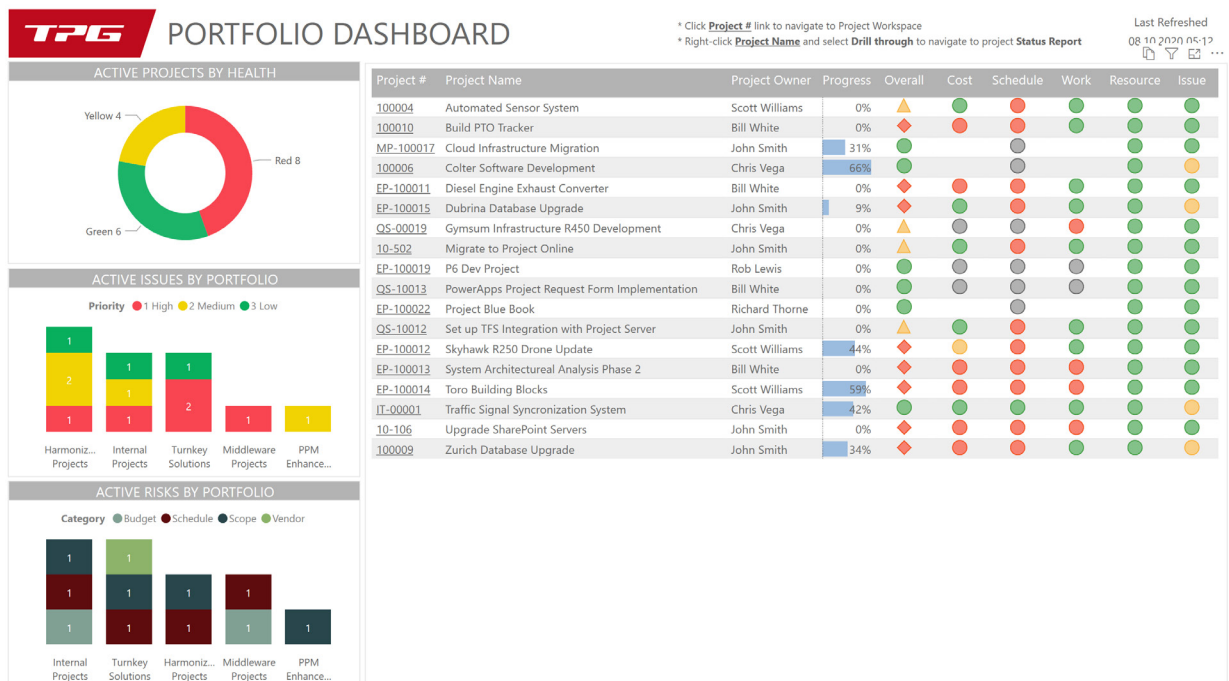
All reports of the TPG Power BI ReportPacks Professional and Enterprise are easy to export to PowerPoint or PDF at the push of a button. This feature makes it possible to easily share these reports in these formats.

## TPG Power BI ReportPack Professional

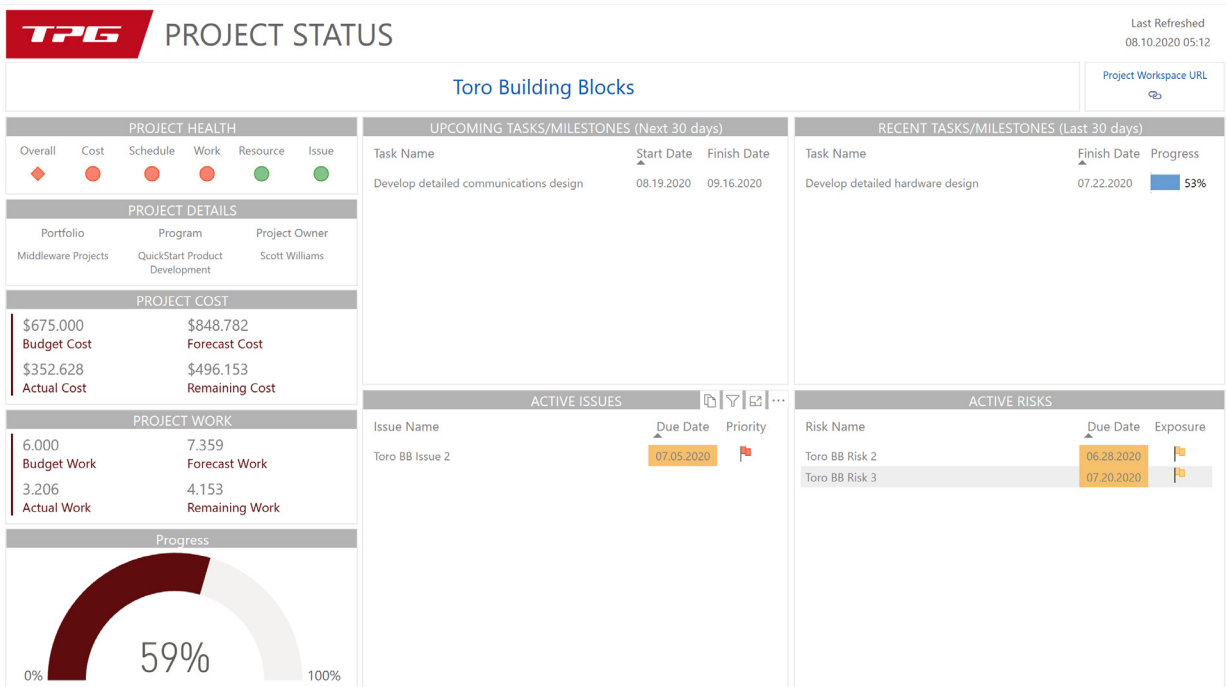
Find a few examples of the reports in the TPG Power BI ReportPack in the Professional version below.



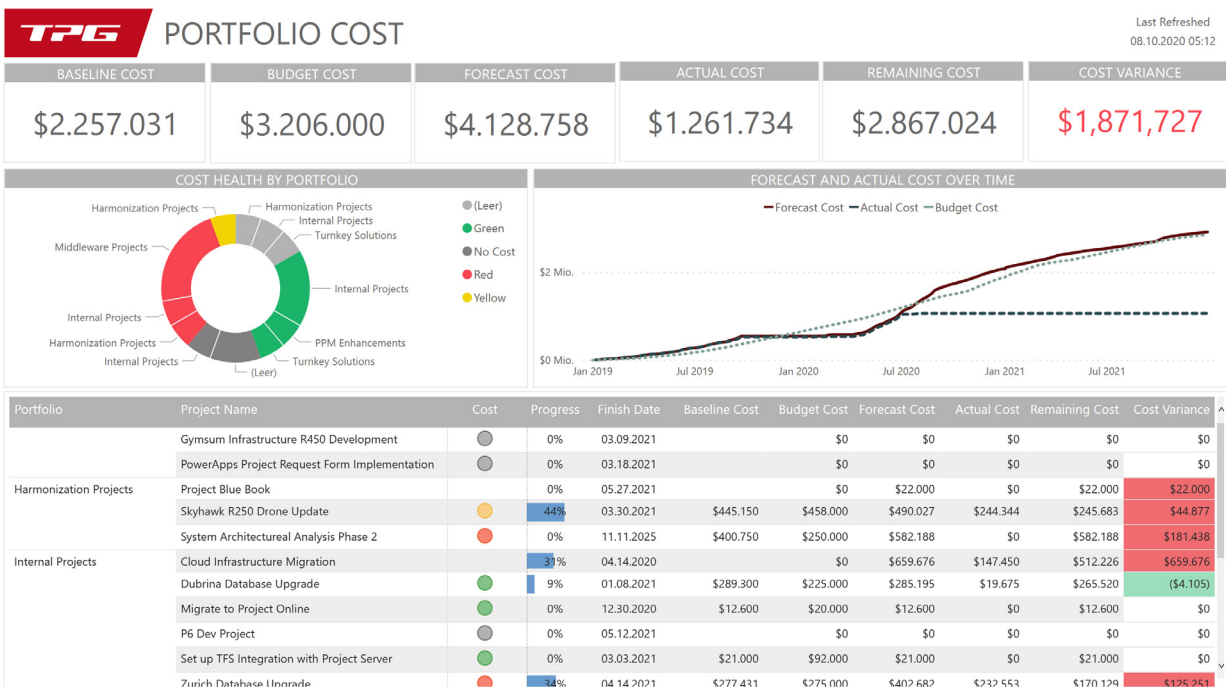
Project requests – Overview of project requests by prioritization, states and benefits



Portfolio dashboard – Project portfolio by project status with KPIs, active issues and risks



Project reports – Project status with KPIs, risks, active issues, project milestones



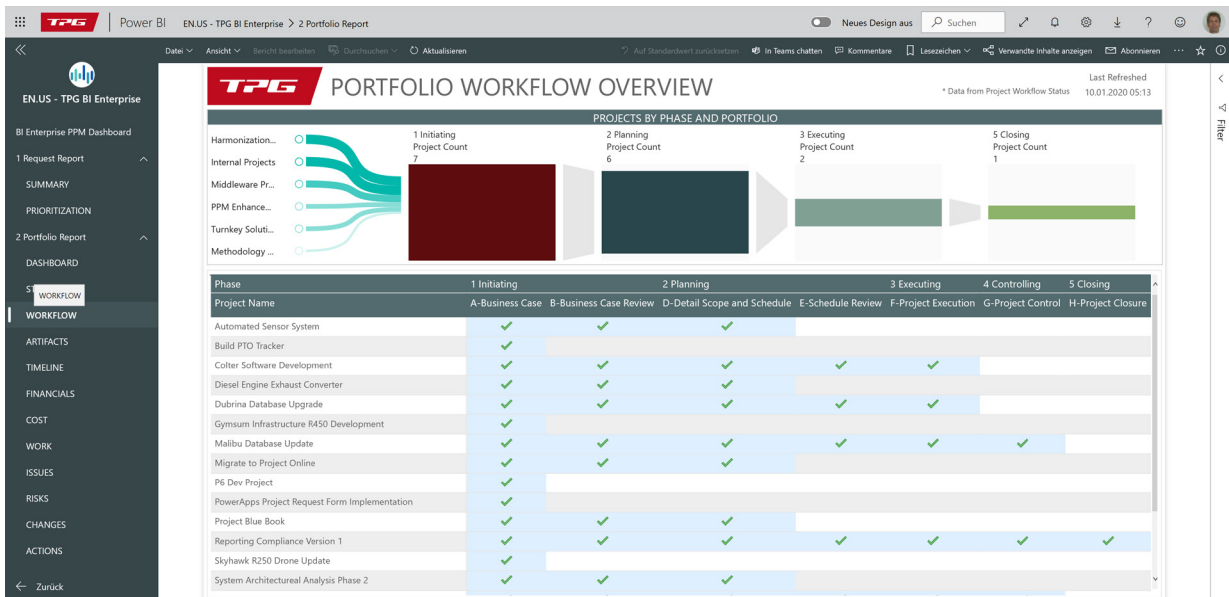
Portfolio cost – Cumulative cost at portfolio level by programs

Please find further examples of the TPG Power BI ReportPack Professional here:  
[www.theprojectgroup.com/reportpack](http://www.theprojectgroup.com/reportpack)

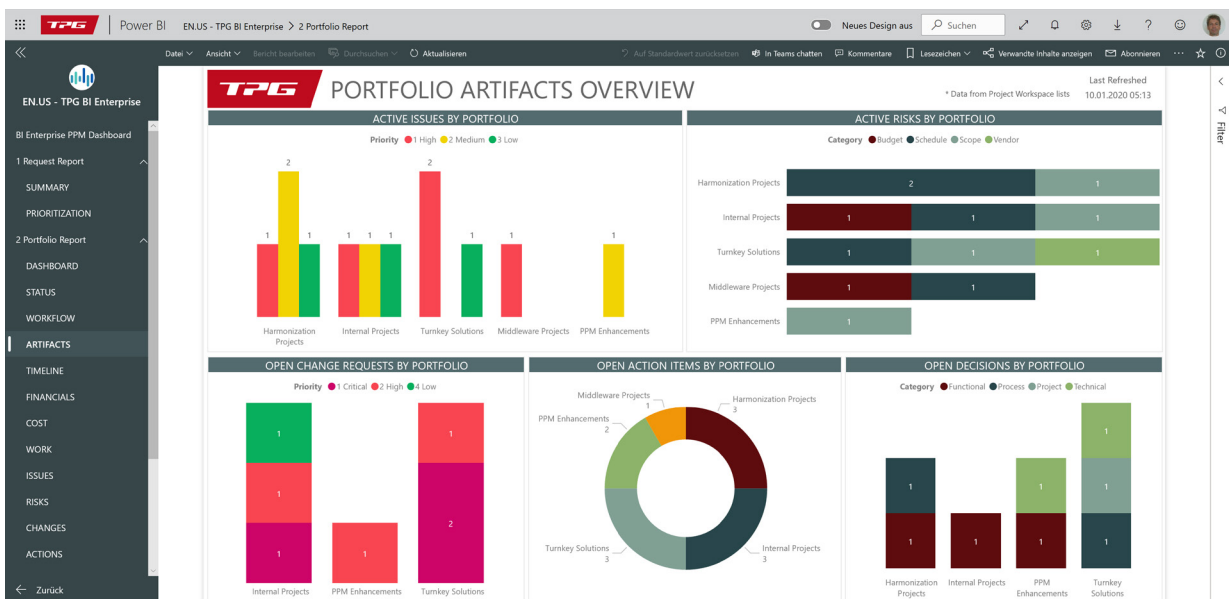
## TPG Power BI ReportPack Enterprise

As mentioned above, the TPG ReportPack in the Enterprise version comprises many additional reports. To enable the read-out of the report data, the customer receives a runtime version of the integration middle-ware TPG PSLink (on premise or in the cloud). TPG PSLink is equipped to access the necessary data in Share-Point and edit them for the TPG Power BI Enterprise ReportPack.

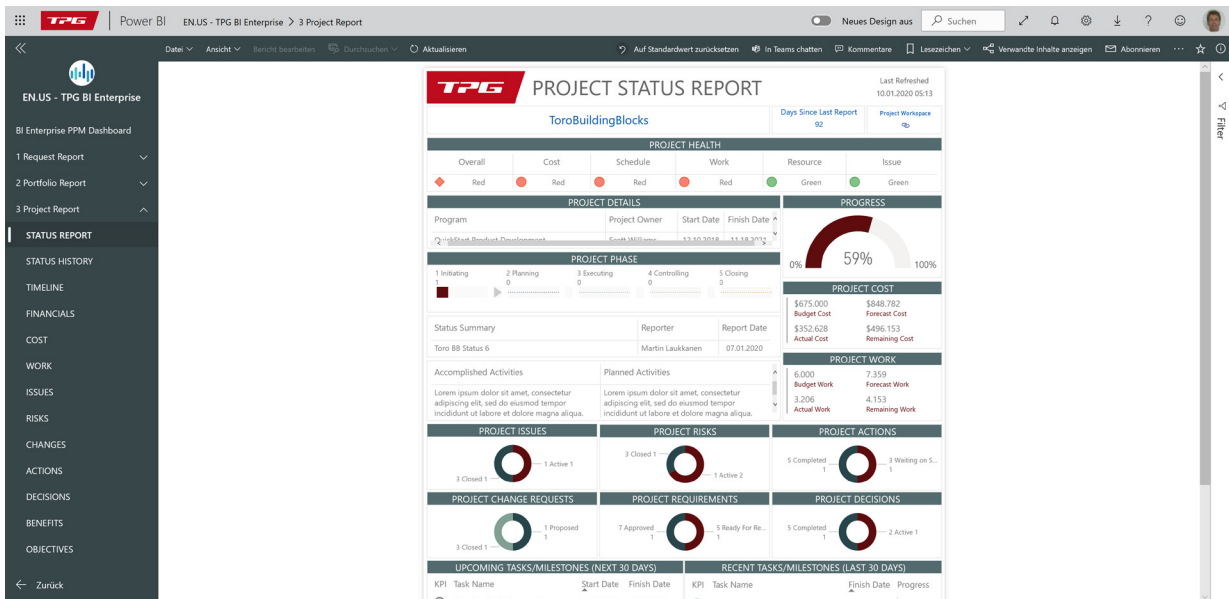
**Note:** It is possible to extend the TPG PSLink license for the subsequent integration of further data sources from other systems. Find a **few examples** of the **TPG Power BI ReportPack in the Enterprise version** below.



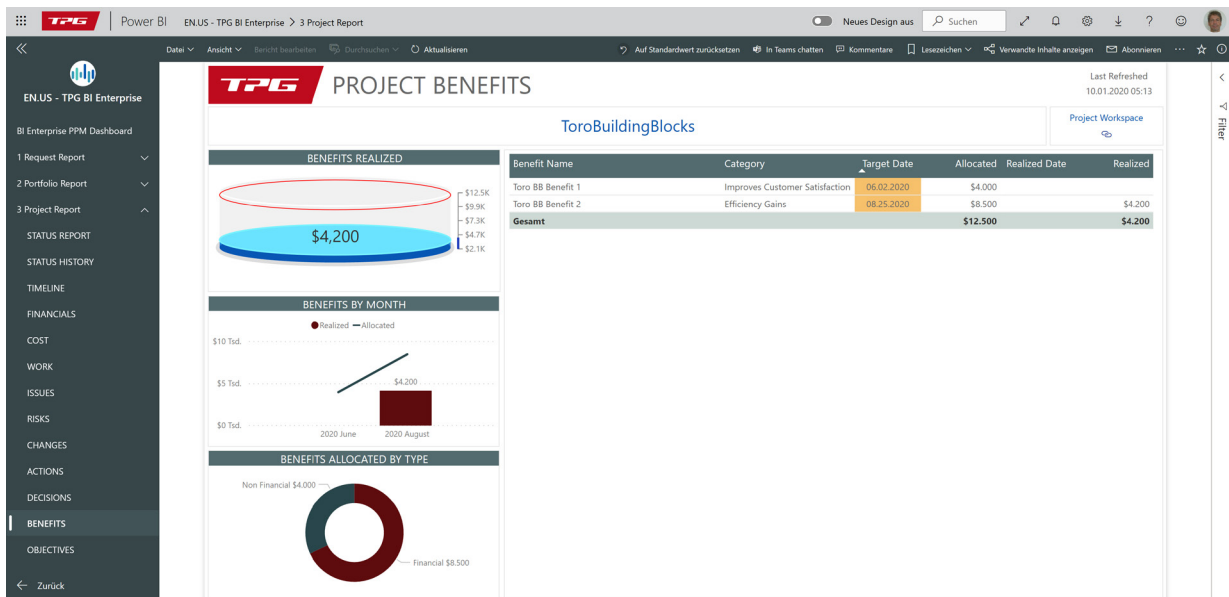
Portfolio pipeline – Projects by phase in the project life cycle



Portfolio CAIRD (Changes, Action Items, Risks, Issues, and Decisions) – Comprehensive overview of information on the project that is not included in the schedule



Extended project status report – Historical statuses information with all the CAIRD-related data



Project Benefits – Overview of project benefits

Please find more examples of the TPG Power BI ReportPack Enterprise here:  
[www.theprojectgroup.com/reportpack](http://www.theprojectgroup.com/reportpack)

## TPG Strengths in Business Intelligence and Reporting

TPG is a Microsoft Gold Certified Partner. For many years, we have contributed valuable expertise in reporting in general as well as with Microsoft Project Server / Project Online and Excel in particular. Our three main strengths are:

- ▶ **Data from project management and ERP systems in one report:** For years, TPG has been **integrating ERP systems (e.g. SAP)** with project management systems. Create integrated system reports at the click of a mouse. Data from both systems appear in one report and in the desired format (e.g. PowerPoint or PDF) for easy analysis and sharing.
- ▶ **Dynamic creation of PowerPoint presentation:** Create dynamic reports directly in your company PowerPoint template. The required data are automatically pulled from Microsoft Project Server / Project Online, the ERP system or other databases. This works even for interactive PowerPoint slides.
- ▶ **Analyzing historical trends:** By capturing reports in one system, you can easily compare historical and current data at the click of a mouse. Analyze trends for cost, schedule and resource utilization.

## Extensive Experience with Reports for Project Management

In most cases, customers already use their own reports. Often, they want to keep these as they are. TPG is usually tasked with integrating the information from the newly introduced project management tool, such as Microsoft Project Server / Project Online or Planisware, into the existing reports. We have extensive experience in consulting and technical implementation for this task.

Find more information here:

[www.theprojectgroup.com/reportpack](http://www.theprojectgroup.com/reportpack)

Or feel free to contact us anytime at:

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

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*“For our PMO staff, the more detailed possibilities of the new Microsoft Project Reports solution are an efficient tool – especially the analysis down to the task level”*

**Katharina Fiedler, PMO, Münchener Verein Versicherungsgruppe**