Reports - as of September 2018

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Note for Merlin Project Express users

The following functions are only available in Merlin Project.

**Reports** provide you with a better overview of project content and information, and are perfect for forwarding to project participants.

The **Report** view in Merlin Project includes several preinstalled reports.

Existing **reports** can be used directly or adapted to your own needs.

Each **report** uses **modules** which compile the **content** from the various project **views** to produce the **report**.

![Report view in Merlin Project](image)

<table>
<thead>
<tr>
<th>#</th>
<th>Status</th>
<th>Title</th>
<th>Group/Path</th>
<th>Resources</th>
<th>Expected Start</th>
<th>Complete</th>
<th>Remaining Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>On time</td>
<td>Create Content Chart</td>
<td>New website &gt; Pre-production</td>
<td>pm</td>
<td>28/07/17</td>
<td>70 %</td>
<td>1.24h</td>
</tr>
<tr>
<td>11</td>
<td>Behind schedule</td>
<td>Define Communications</td>
<td>New website &gt; Pre-production</td>
<td>pm</td>
<td>04/08/17</td>
<td>60 %</td>
<td>4h</td>
</tr>
<tr>
<td>7</td>
<td>On time</td>
<td>Create Project Proposal</td>
<td>New website &gt; Pre-production</td>
<td>pm</td>
<td>27/07/17</td>
<td>50 %</td>
<td>2d</td>
</tr>
<tr>
<td>8</td>
<td>On time</td>
<td>Create Timeline</td>
<td>New website &gt; Pre-production</td>
<td>pm</td>
<td>26/07/17</td>
<td>50 %</td>
<td>1d</td>
</tr>
<tr>
<td>9</td>
<td>On time</td>
<td>Create Task List</td>
<td>New website &gt; Pre-production</td>
<td>pm</td>
<td>27/07/17</td>
<td>50 %</td>
<td>1d</td>
</tr>
</tbody>
</table>

**Report modules**

The **modules** can be clicked in the report using the mouse and modified in the **Inspector**.

![Report modules](image)

Click the plus icon to create new **modules**.
The following module types can be used in a report:

- Bar Chart
- Budget Cost Chart
- Project View
- Text
- Time Phase Chart
- Time Phase List

The Project View module is used most frequently. Project view columns and Gantt chart options can be modified and managed directly in the module.

Use the Filter and Filter Mode options in the Inspector to filter the display of information in the module.

Use the Grouping and Grouping Mode options in the Inspector to group the display of information in the module.

The Inspector offers different options depending on the type of report module selected.

The Budget Cost Chart provides budget columns for the chart, making it handy for creating reports with cost information.
The **Time Phase List**, however, requires **values** for **sampling duration** and the **fields**.

Click the **plus** icon to create a new **field**. In the **Type** column, set the **chart** display type. If you tick the **cumulated** checkbox you can display **cumulated field values** in the chart.
Creating custom report views

You can create a custom report view as follows:

Click a report view and select the Edit option.

Name the new report view and click Activate.

Now continue by building the newly created report view with modules. Click the plus icon to add new modules.
Examples

Inserting and removing columns in the »Status« report view

To **activate** and **deactivate** columns in the **Project View** report module, you first need to configure the actual **project view instance**.

Under **Report → Status** several project views are displayed in the modules. In the Inspector, the **views** for the module* can be selected using the **Type** and **View** drop-down menus. In the example shown, the **Slightly Behind Schedule** module is selected. It uses the **Work Breakdown → Status Compact** view. This view is controlled by the **filters**.

In this way, individual **modules** can be integrated with the **filter** option for **activities** that are, for example, **on** or **behind schedule**.

To **insert** another **column** in the module, first switch to the view that the **module** accesses (in this example **Work Breakdown > Status Compact**).

Insert the desired **column** by **clicking** the **arrow** in any column and then selecting the option **New Column**.
You can customize the format of the column either in the original project view or in the report module. If you want to apply the change to all report modules with this view, change the format in the original project view.

To remove the column use the delete key or click Hide in the column header.

The steps listed above produce the following column combination in the Status Compact view:
When you return to the **Report > Status** view, the changed columns from the **view** appear in the **report modules**.
Changing the sampling duration in the »Earned Value« report view

Switch to the report view Report > Earned Value.

Click the module with the Earned Value chart.

Enter the desired Sampling duration in the Time Phase Chart Inspector, for example 1 eday.

You can use days, weeks, quarters, and years. Alternatively, you can use edays, eweeks, equarters, and eyears.

The accuracy of the chart increases because the values are calculated per consecutive day.
If you select a long **sampling duration**, the information is displayed **linearly** in the chart.
Displaying work costs per resource in a chart and table

In Merlin Project you can customize existing report views and save them as new views using custom report modules. In this example, switch to Report → Budget/Cost Overview.

Under the View menu item, click Reports > Edit.

Select the Budget/Cost Overview view, then click the plus icon to duplicate the view.

Name your custom report and click Activate.

Delete the Budget Cost Chart and insert the Bar Chart module.
Edit the **title** (e.g. *Work*). Activate the filter by clicking the **magnifying glass**. Configure the **filter setting** for **All Resources** except the **Default Resource**.

Add the **Project View** report module.

Set **Type** to **Resource** and **View** to **Costs**. Activate the **Filter** for **Real Resources**. Set the **Grouping** to **Role**.
The result shows you all resource costs filtered by real resources and grouped by role.

Sharing the report view with other local documents

Under the Display menu item, select Reports → Edit.

Select a desired report view.

Click the gear icon and then click Share with other local projects.