Reports

Guides for Merlin Project

Reports - as of November 2020

Note for Merlin Project Express users

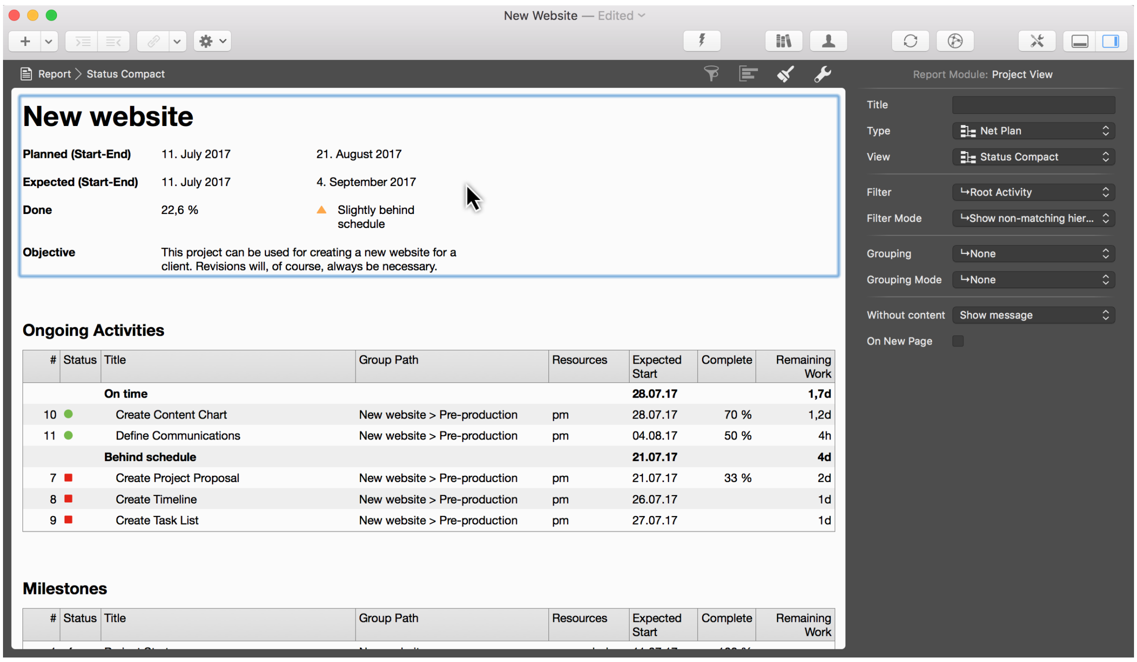
The following functions are only available in Merlin Project.

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.

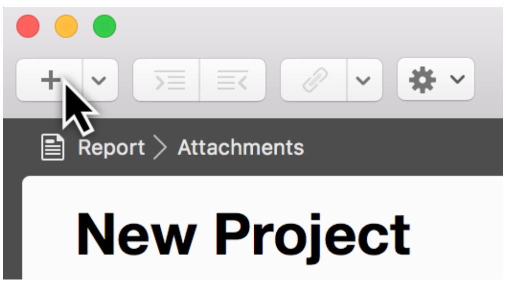
Existing **reports** can be used directly or adapted to your own needs.

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

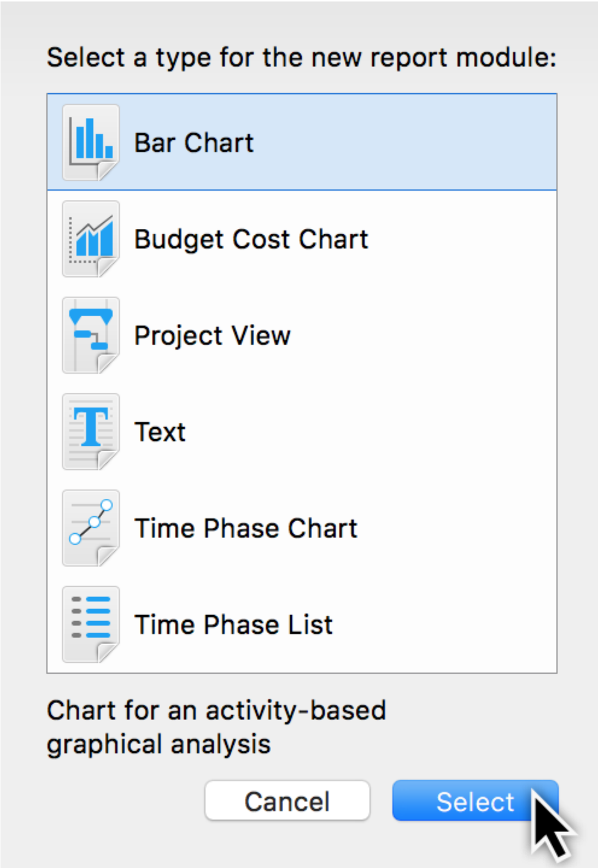


Report modules

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



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**

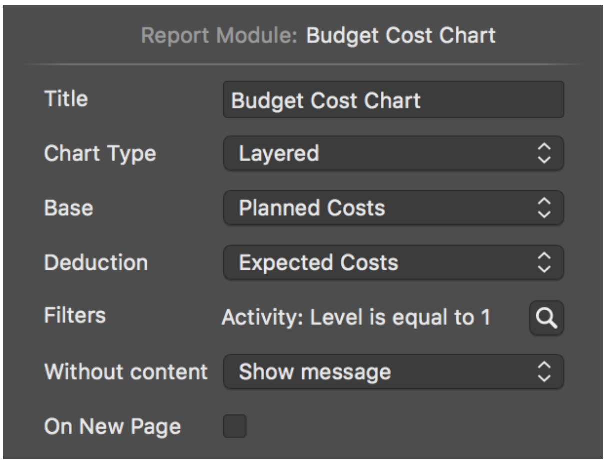
The **Project View module** is used most frequently. Project view columns and Gantt chart options can be modified and managed directly in the **module**.

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

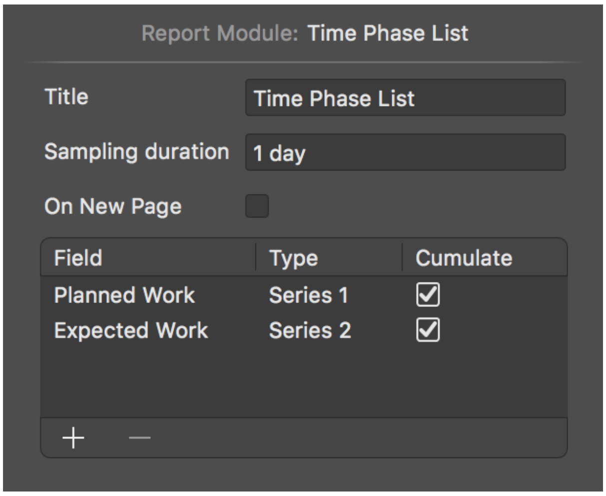
Use the **Grouping** and **Grouping Mode** options in the Inspector to group the display of **information** in the **module**.

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

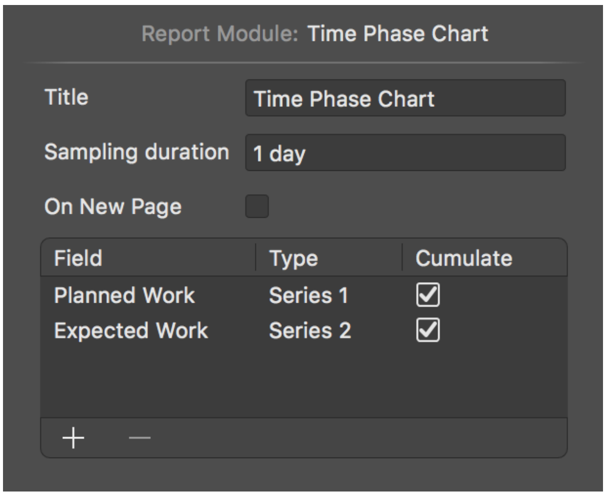
The **Budget Cost Chart** provides **budget columns** for the **chart**, making it handy for **creating** reports with **cost information**.



The **Time Phase List**, however, requires **values** for **sampling duration** and the **fields**.



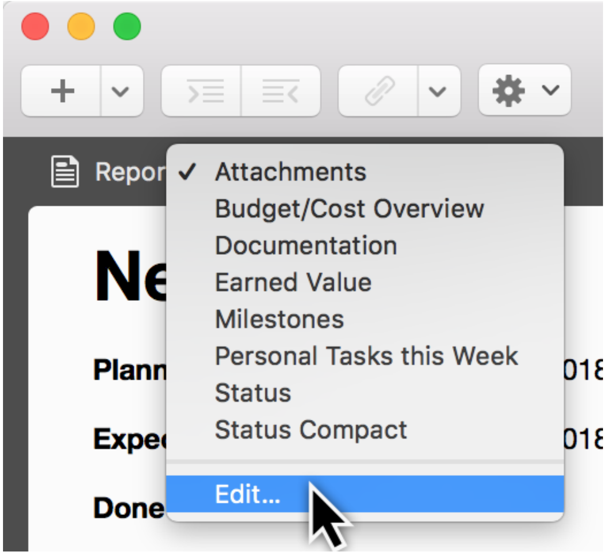
The same applies to the **Time Phase Chart**:



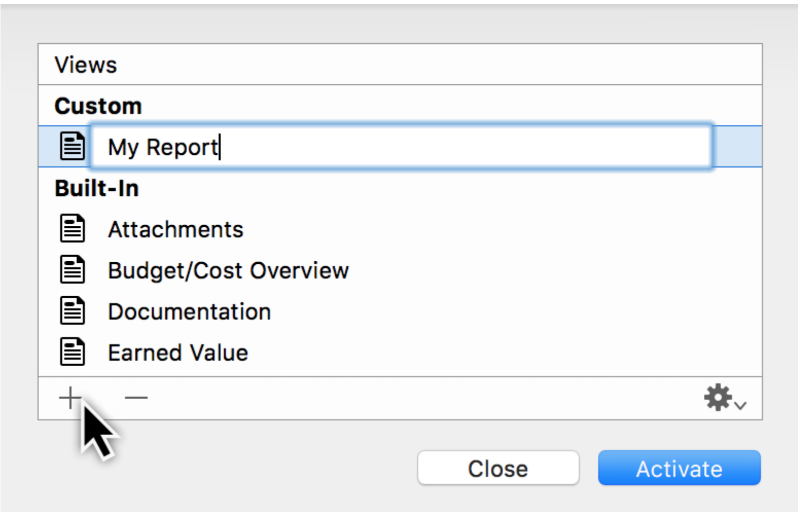
Click the **plus** icon to create a new **field**. In the **Type** column, set the **chart** display type. If you tick the **cumulated** checkbox you can display **cumulated** field **values** in the chart.

Creating custom report views

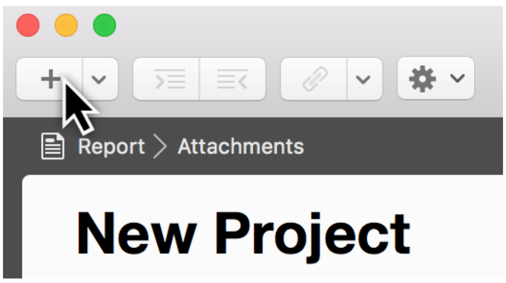
You can create a **custom report view** as follows:



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.

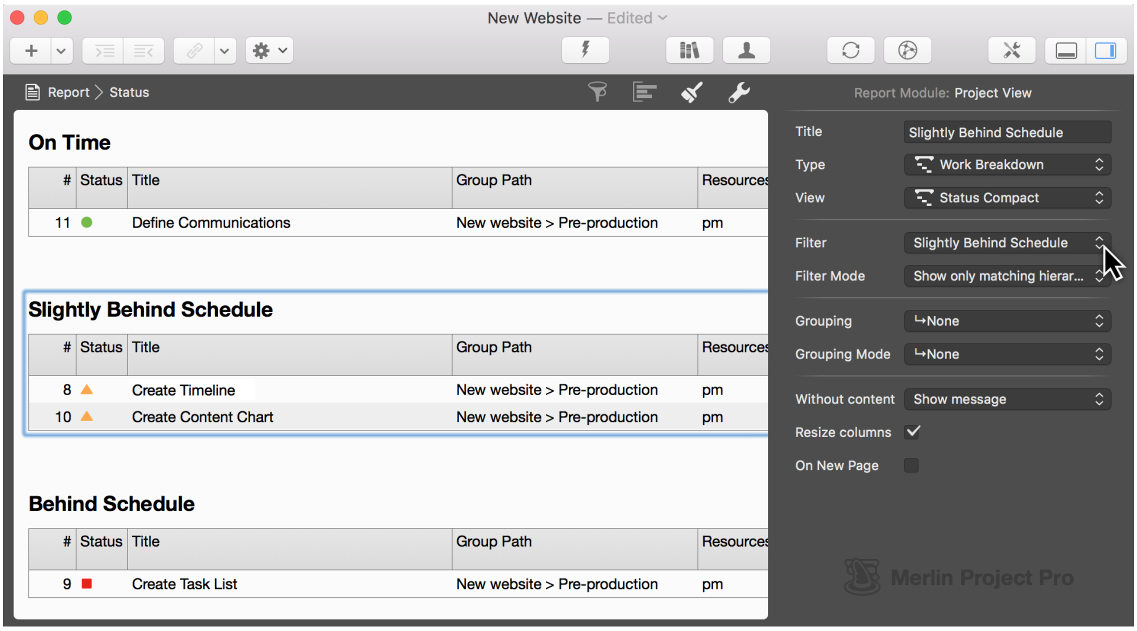
Examples

Inserting and removing columns in the »Status« report view

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

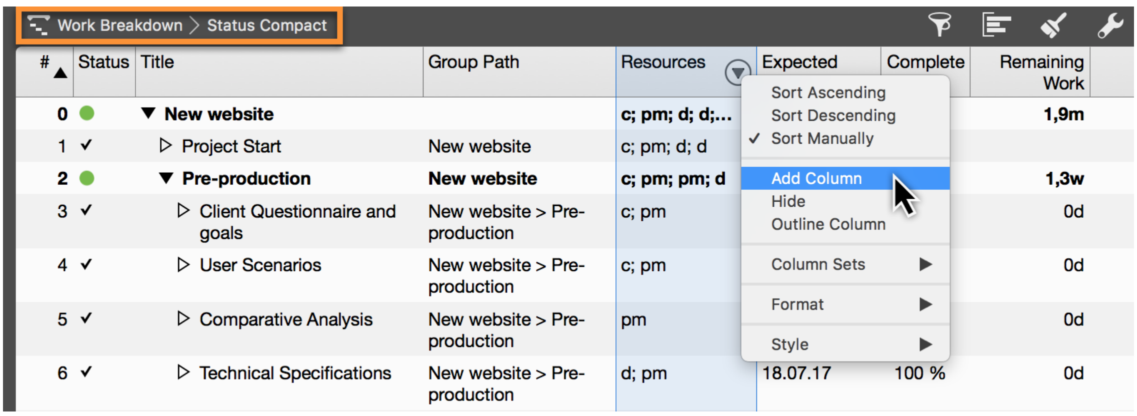
Under **Report → Status** several project views are displayed in the modules. In the Inspector, the **views** for the module can be selected using the ***Type*** and ***View*** drop-down menus. In the example shown, the ***Slightly Behind Schedule*** module is selected. It uses the **Work Breakdown →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

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

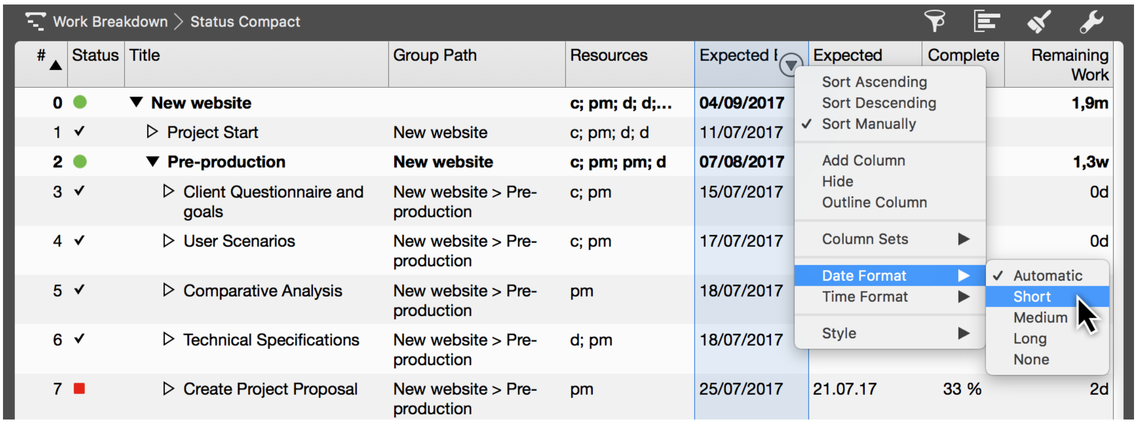


To **insert** another **column** in the module, first switch to the view that the **module** accesses (in this example **Work Breakdown > Status Compact**).

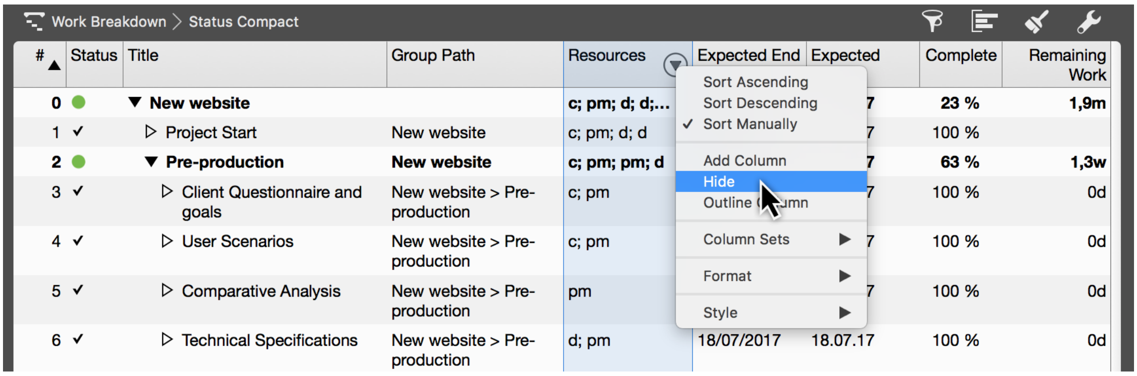
Insert the desired **column** by **clicking** the **arrow** in any column and then selecting the option **New Column**.



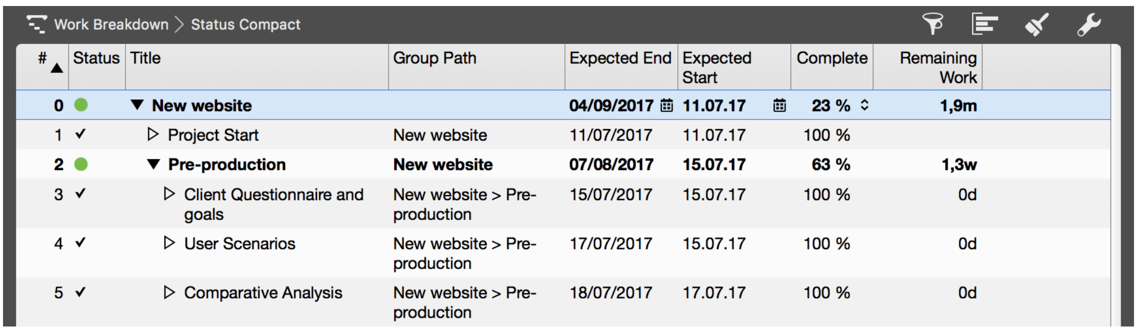
You can customize the **format** of the **column** either in the original **project view** or in the **report module**. If you want to apply the change **to all** report modules with this view, **change the format** in the original **project view**.



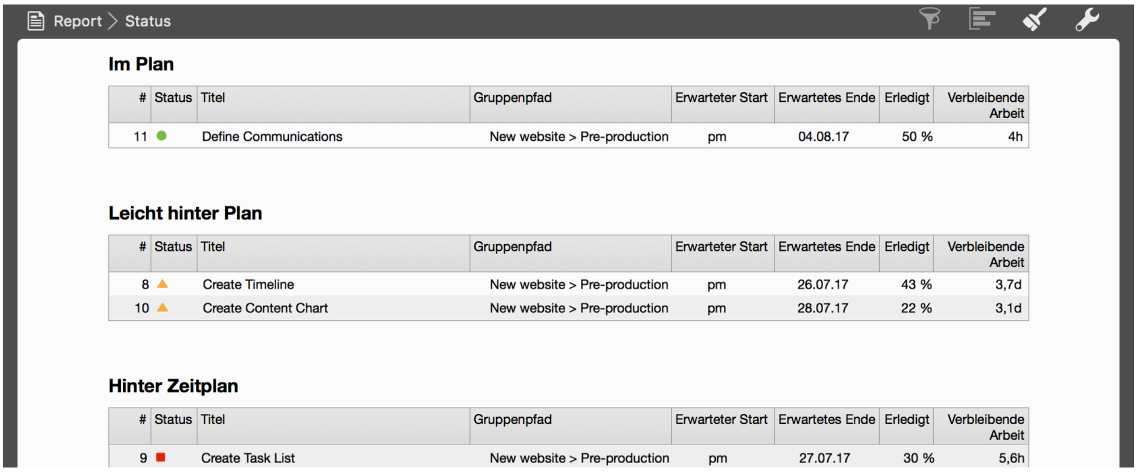
To **remove the column** use the **delete** key or click **Hide** in the **column header**.



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**.



Report > Status

Im Plan

#	Status	Titel	Gruppenpfad	Erwarteter Start	Erwartetes Ende	Erledigt	Verbleibende Arbeit
11		Define Communications	New website > Pre-production	pm	04.08.17	50 %	4h

Leicht hinter Plan

#	Status	Titel	Gruppenpfad	Erwarteter Start	Erwartetes Ende	Erledigt	Verbleibende Arbeit
8		Create Timeline	New website > Pre-production	pm	26.07.17	43 %	3,7d
10		Create Content Chart	New website > Pre-production	pm	28.07.17	22 %	3,1d

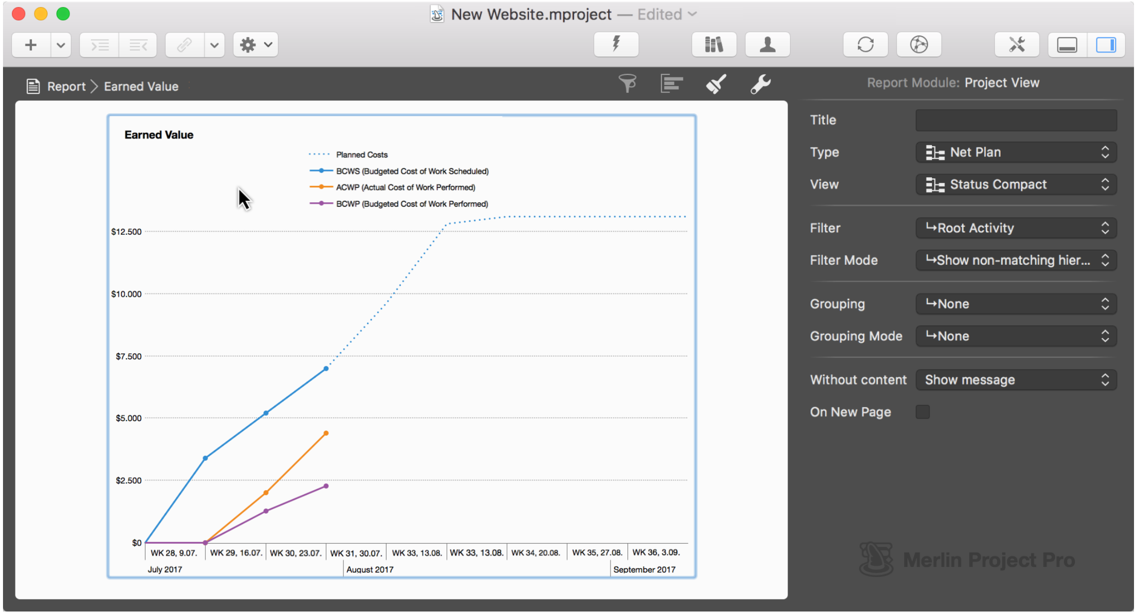
Hinter Zeitplan

#	Status	Titel	Gruppenpfad	Erwarteter Start	Erwartetes Ende	Erledigt	Verbleibende Arbeit
9		Create Task List	New website > Pre-production	pm	27.07.17	30 %	5,6h

Changing the sampling duration in the »Earned Value« report view

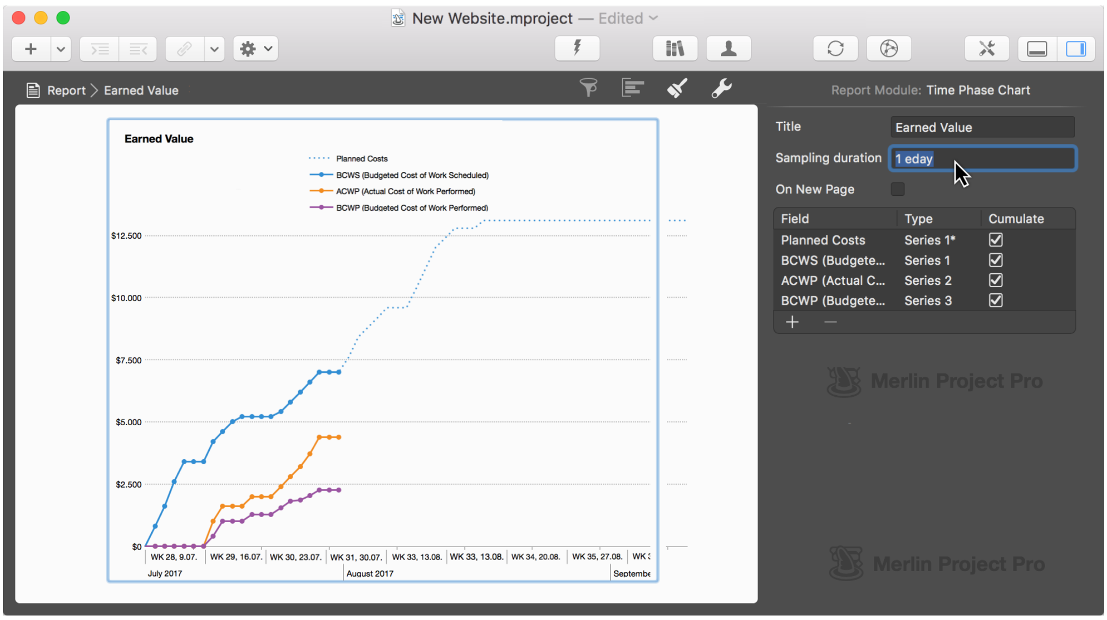
Switch to the report view **Report > Earned Value**.

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**.

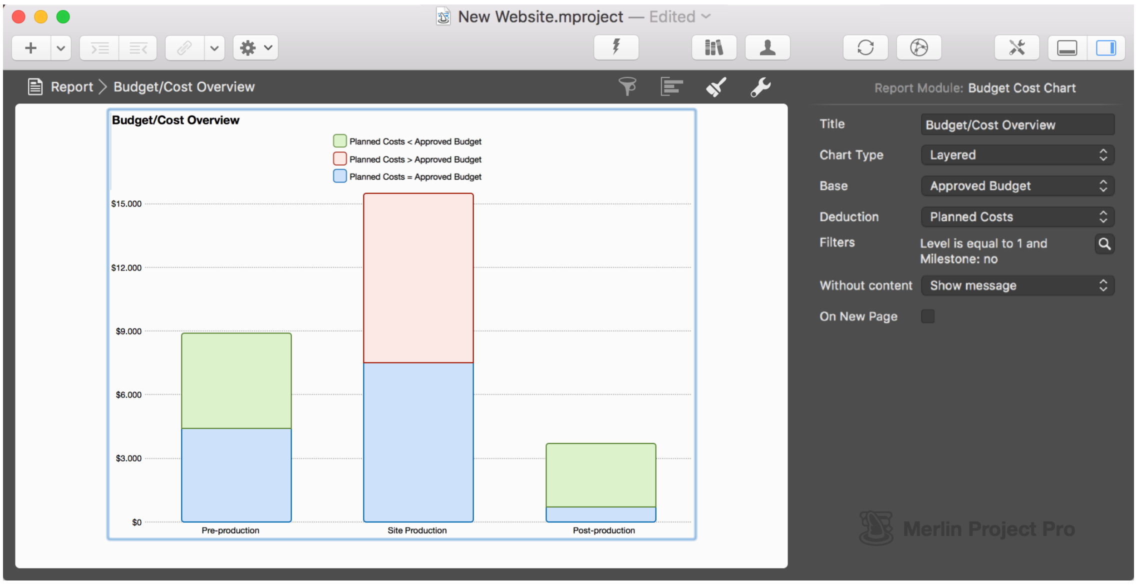


The **accuracy** of the chart increases because the values are calculated per consecutive day.

If you select a long **sampling duration**, the information is displayed **linearly** in the chart.

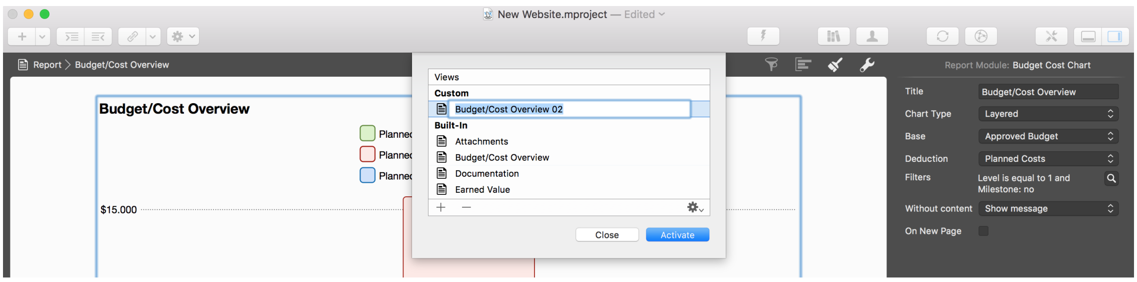
Displaying work costs per resource in a chart and table

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**.



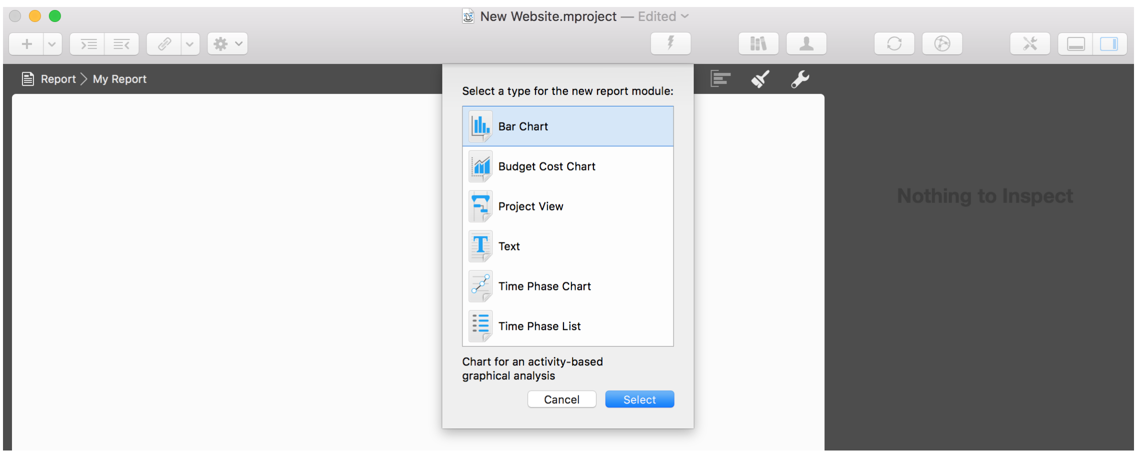
Under the **View** menu item, click **Reports > Edit**.

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

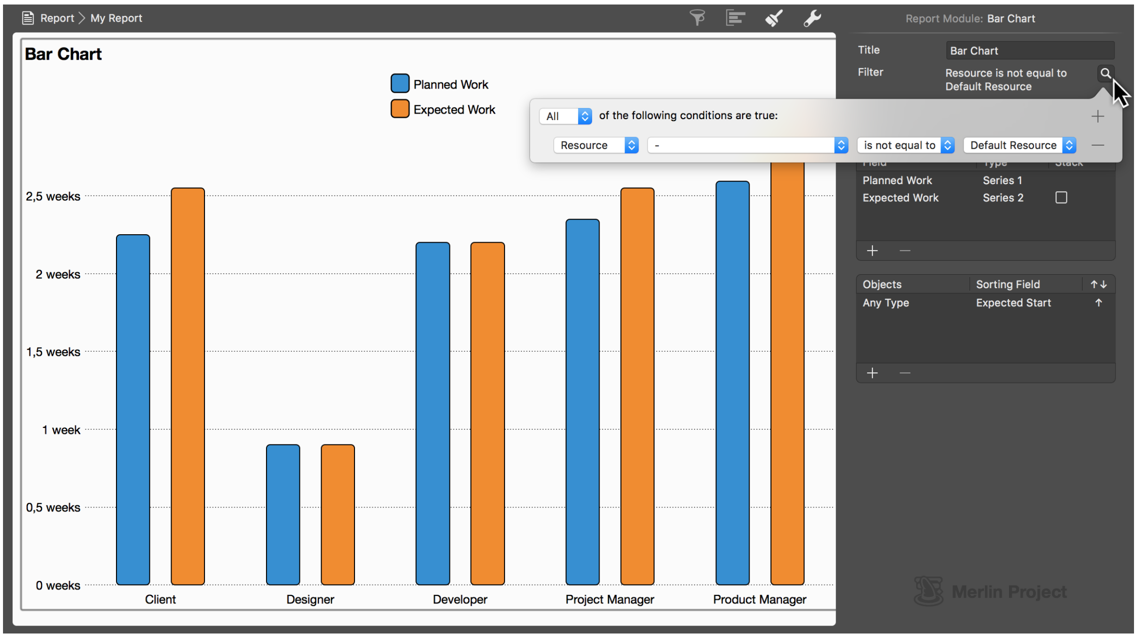


Name your custom report and click **Activate**.

Delete the **Budget Cost Chart** and insert the **Bar Chart** module.

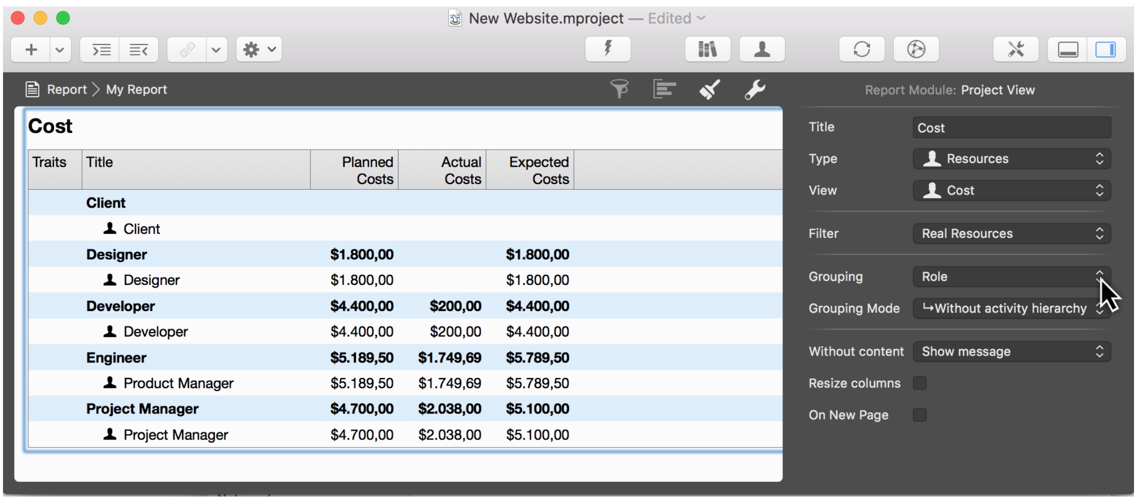


Edit the **title** (e.g. *Work*). Activate the filter by clicking the **magnifying glass**. Configure the **filter setting** for **All Resources** except the **Default Resource**.



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**.



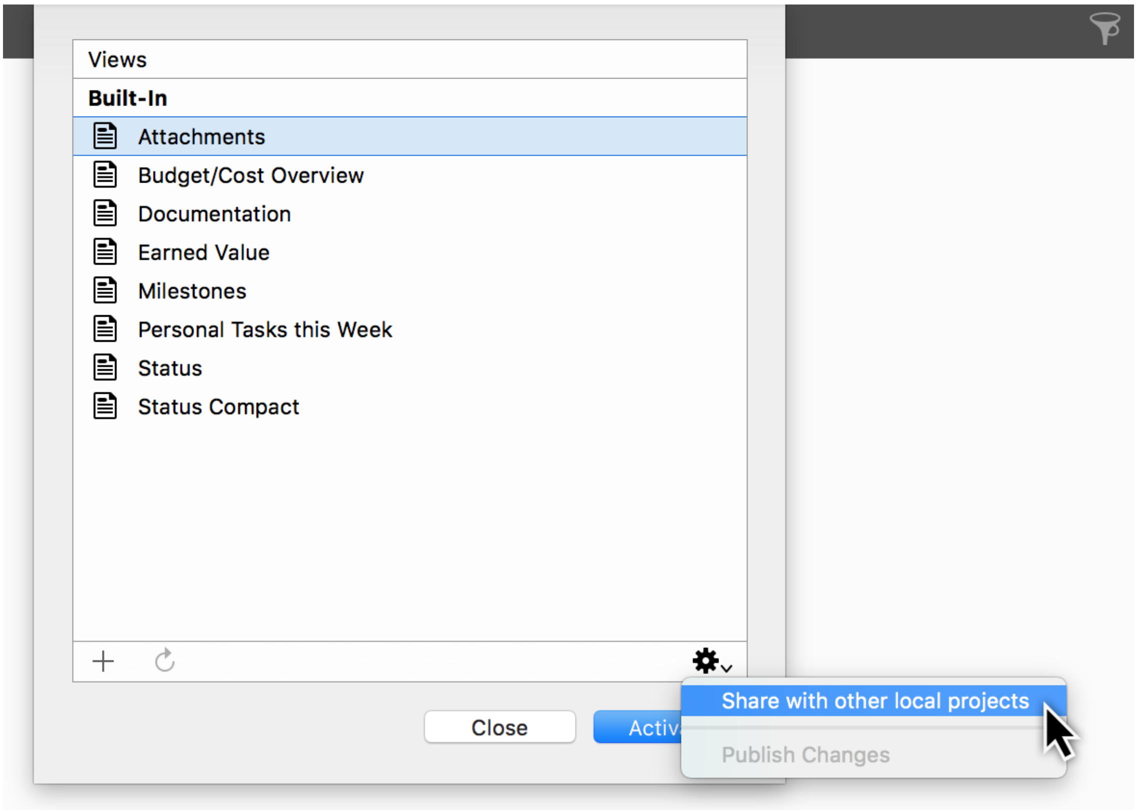
The **result** shows you all **resource costs** filtered by **real resources** and grouped by **role**.

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**.


Views
Built-In
Attachments
Budget/Cost Overview
Documentation
Earned Value
Milestones
Personal Tasks this Week
Status
Status Compact
Close
Share with other local projects
Publish Changes