

Initial situation

At regular intervals, the project management must report on the status of a project. The current project information on deadlines, work, costs, risks, etc. must be compiled, mostly from various systems (e.g. Microsoft Project, Microsoft Excel, SAP ERP, etc.). The subsequent manual conversion to a Microsoft Word or Powerpoint report template takes time and nerves and bears the risk of conversion errors.

The standard version of Microsoft Project Server offers a wide range of views and evaluations on the project information, but lacks an integrated status report with the project manager's evaluation of the project progress.

“Progress of deadlines and budget automatically summarised. That must be possible.”

R&D manager for the manufacturing and process industry

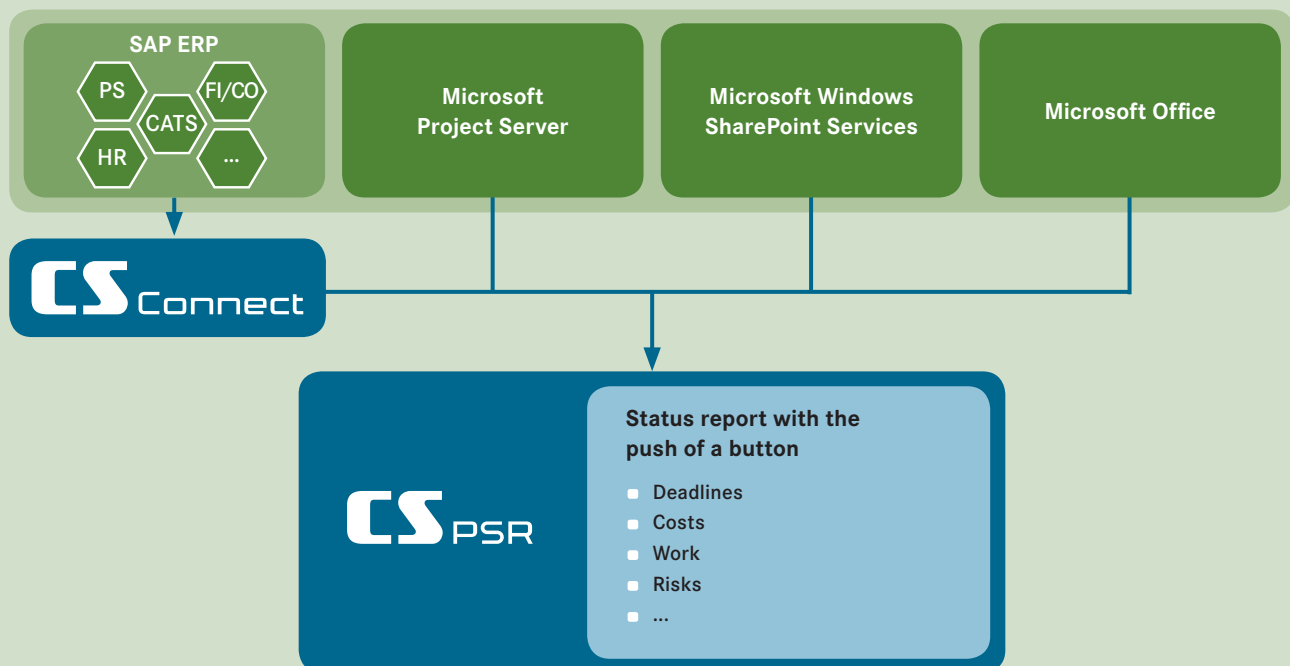
Solution

The standard product “CS Project Status Reporting” (CS PSR) supports the project manager in summarising all current project information to create a detailed project report. The data are automatically read from the source systems. The project manager completes these with the “soft facts”, e.g. traffic light status, changes and decision proposals.

Thanks to the automated historicising of the individual project status reports, each project has trend progressions for degree of completion, work, costs, etc., as well as standard instruments such as milestone trend analysis. Printouts, as a PDF file, are possible at any time.

To support management decisions, there is a summarisation to create a compact management report. Thus, a steering committee can specifically focus on critical projects, make timely decisions and resolve prioritisation conflicts within the project portfolio.

Automated Project Status Reporting





Technology

The module CS PSR is an extension for Microsoft Project Server to support project reporting. CS PSR can be directly integrated in Microsoft Project Web Access, operated via CS Project Portal or integrated in a SharePoint Server portal. Mask and reports developed on the basis of standard Microsoft technologies (.NET-Framework, SQL Server Reporting Services) can be flexibly adjusted to the customised report requirements.

When a status report is created, current project information is taken from the Project Server via the Project Server Interface (PSI) and the reporting database (deadlines, work, costs, etc.) and stored in a special database. It can be completed with data from other systems such as SharePoint Server or (if CS Connect is used) SAP ERP. In addition, the information can be later manually added to or edited. CS PSR uses the role and rights system of MS Project Server.

Benefits

CS PSR can be used to automate the process of monthly status reporting. Thus, project managers gain more time for the actual project control and communication as a team.

Further benefits for companies who use CS PSR:

- Time and cost savings by the automatic summarisation of current project information in the status report
- Improvement of the data quality by the avoidance of duplicate entries/ change in medium
- More transparency thanks to the central storage of all status reports with sorting and filter options
- High acceptance among users thanks to a simple user interface

“What was previously a time-consuming, manual reporting process is now completely unnecessary.”

Manager for development controlling, multinational high-tech company

Status and Management Report

