

Oracle
**Primavera P6 Professional
Reporting Guide**

Version 25
January 2025

Oracle Primavera P6 Professional Reporting Guide
Copyright © 2018, 2025, Oracle and/or its affiliates.
Primary Author: Oracle Corporation

Contents

About This Guide.....	7
Producing Reports and Graphics.....	9
Report Basics.....	9
Reporting features	9
Report Wizard	10
Create a new report with the Report Wizard	10
Modify a report with the Report Wizard	11
Report Editor	11
Preview a report	12
Print a report.....	13
Copy a report	14
Import a report	14
Export a report.....	15
Delete a report	15
Format numbers in reports.....	15
Create default headers, footers, and custom labels for reports (P6 EPPM Only).....	16
Working with Report Groups.....	16
Create a report group.....	16
Edit a report group	16
Add a report to a report group.....	17
Remove a report from a report group	17
Delete report groups	17
Working with Report Batches	18
Create a report batch.....	18
Add a report to a report batch	18
Remove a report from a report batch	19
Delete a report batch	19
Print a report batch	19
Run a report batch from the command line	21
Using the Report Editor to Modify Reports	25
Report Editor window.....	25
Basic Procedures	29
Copy and paste cells.....	29
Cut and paste cells	29
Add a report title	30
Define default text styles for reports	30
Define a report header and footer	30
Define page setup options for a report	32
Change report margins.....	32

Add a background image to a report	32
Remove a background image from a report	33
Add comments to reports.....	33
Add comments when running a report	33
Indicate hierarchy levels in reports.....	34
Specify a timeperiod for a report	34
Advanced Procedures	35
Working with Data Sources.....	35
Data sources in reports	35
Add a data source to a report	36
Add an embedded data source to a report	36
Copy a data source	36
Cut and paste a data source	37
Define layout options for a data source	37
Sort report records.....	37
Change the sort order of report records.....	38
Filter a data source.....	38
Delete a data source filter	38
Delete a data source from a report	39
Delete a data source that contains embedded data sources.....	39
Working with Rows	40
Add a row to a report	40
Copy a row	40
Cut and paste a row.....	40
Filter a report row.....	40
Delete a row filter.....	40
Delete a row from a report	41
Working with Text Cells.....	41
Text cell types.....	41
Add a field data or field title cell to a report	41
Show time distributions in a report.....	42
Add a variable cell to a report	42
Add a custom text cell to a report	42
Format text in a text cell	42
Specify text cell width and alignment in a row	43
Change text cell color	43
Add a border to a text cell	43
Remove borders from a text cell.....	44
Add HTML links to a text cell	44
Disable HTML links in a text cell	44
Filter a text cell.....	45
Delete a text cell filter.....	45
Delete a text cell from a report	45
Working with Line Cells	45
Add a line cell to a report.....	45
Specify line cell width and position in a row.....	45

Delete a line cell from a report.....	46
Working with Image Cells	46
Add an image cell to a report	46
Specify image cell width and position in a row	46
Add HTML links to an image cell.....	47
Disable HTML links in image cells	47
Define HTML print settings for an image cell	48
Delete an image cell from a report	48
Producing Graphics	48
Print features.....	48
Print a layout or window data	48
Change page setup options.....	49
Select a specific printer to print a layout.....	51

About This Guide

Scope

This guide contains information about reports in P6 Professional including the sample reports provided, the publication services which provide data for reporting and table auditing.

Audience

Administrators and anyone who creates reports in P6 Professional should read this guide.

Producing Reports and Graphics

In This Section

Report Basics.....	9
Working with Report Groups	16
Working with Report Batches	18
Using the Report Editor to Modify Reports.....	25
Producing Graphics.....	48

Report Basics

Reporting features

In addition to providing a large library of standard project management reports, two reporting tools are available to access and report information stored in the database: the Report Wizard and the Report Editor.

Report Wizard

You can use the Report Wizard to easily create a wide variety of customized reports. The wizard steps you through the process of creating new reports, enabling you to select the category of information and specific data fields to include. You can group, sort, and filter project information and include time-distributed data for units and costs. When you create a report with the Report Wizard, you can later use the wizard or the Report Editor to modify the report, if necessary.

- ▶ Reports created with the Report Wizard have the wizard icon: 

Report Editor

The Report Editor is a powerful tool that enables you to create reports that are highly customized. Although you can create customized reports with the Report Wizard, the Report Editor provides the capability to tailor a report more closely to your specific requirements. The Report Editor enables you to group, sort, filter, and roll up project information. You can display time distributions for units and costs and include graphics and HTML links in your reports. You can use the Report Editor to further customize reports you create with the Report Wizard. However, if you modify a wizard report in the Report Editor, when you reopen the report in the wizard, you lose all of the modifications made in the Report Editor.

- ▶ Reports created with the Report Editor have the report icon: 

Note that to create a new report with the Report Editor, you need to modify an existing report created with the Report Wizard.

Printing and saving reports

You can preview and print reports and you can save reports as text or HTML files. If you save a report to a file, you can import the data to a spreadsheet program, Email the report, publish the report on a Web site, and/or archive the report. You can also compile a report and create a WP & Docs record for the report. Creating a WP & Docs record for the report allows that report to be accessed from the WPs & Docs window. When P6 Professional is connected to a P6 EPPM database, reports can also be accessed from the Project Documents portlet and the Projects, Documents page in P6.

- ▶ To view a list of the standard reports, select Tools, Reports, Reports.

Creating default headers, footers, and custom labels (P6 EPPM database Only)

You can define three default sets of headers, footers, and custom labels for reports. These default settings apply to all projects and can be viewed by all users, but you must have Add/Edit/Delete Global Reports global privilege, as defined in P6, to edit these settings.

- ▶ To create default headers, footers, and custom labels, select Tools, Reports, Report Preferences.

Report Wizard

You can use the Report Wizard to create new reports and modify existing wizard reports.

The Report Wizard helps you easily create new customized reports by enabling you to

- ▶ Select the subject areas and specific fields you want to include
- ▶ Group, sort, and filter report data
- ▶ Choose to display report data based on actual to date or past period actual values
- ▶ Control report column sizes
- ▶ Add a report title
- ▶ Preview the report and modify it

When you create and save a report using the Report Wizard, you can later use the wizard or the Report Editor to modify it. However, if you modify a wizard report in the Report Editor, when you reopen the report in the wizard, you lose all of the modifications made in the Report Editor.

Tip

- ▶ If you want to modify a report, but think you might want to use the original report again, make a copy of it first.

Create a new report with the Report Wizard

- ▶ Choose Tools, Report Wizard. Follow the prompts on each dialog box in the wizard to create the report.

Notes

- ▶ When connected to a P6 Professional database: To create or edit global reports from the Report Wizard or Report Editor, you must have Edit Global Reports security privileges. To create or edit project reports from the Report Wizard or Report Editor, you must have Edit Project Reports security privileges. You do not require security privileges to view global or project reports.

When connected to a P6 EPPM database: To create or edit global reports from the Report Wizard or Report Editor, you must have the appropriate global privileges as defined in P6. To create or edit project reports from the Report Wizard or Report Editor, you must have the appropriate project security privileges as defined in P6. You do not require security privileges to view global or project reports.

- ▶ You can use the Report Editor to further customize reports you create using the wizard. However, if you modify a wizard report in the Report Editor, when you reopen the report in the wizard, you lose all of the modifications made in the Report Editor.

Modify a report with the Report Wizard

- 1) In the Reports window, select the report.
- 2) Click the Reports Wizard icon on the Reports toolbar.
- 3) On the first wizard screen, choose Modify Wizard Report, then click Next.
- 4) Follow the prompts on each dialog box in the wizard to modify the report.

Report Editor

The Report Editor enables you to create highly customized reports. You can use the Report Editor to modify reports that you create in the Report Wizard and to create new reports. If you modify a wizard report in the Report Editor, when you reopen the report in the wizard, you lose all of the modifications made in the Report Editor.

Use the Report Editor window to add, edit, and organize report components and to customize the look of a report by specifying font styles, and adding images, headers and footers, and comments. The main report components you can work with are data sources, rows, and cells. The Report Editor window includes a toolbar and right-click menus that enable you to easily add and customize report components.

Create a blank report

- 1) Select an existing report.

Copy and paste an existing report first if you do not want to modify the original report.

- 2) Right-click on the selected report and choose Modify.
- 3) Click Yes to confirm that you want to use the Report Editor.
- 4) Within the Report Editor, click the new report icon: 

- 5) Click Yes to confirm.

You can now start creating a new report with the Report Editor.

Preview a report

- 1) In the Reports window, select the report and click  on the Reports toolbar, or right-click on the report and choose Run, Report.
- 2) Choose Print Preview, then click OK.

To change the page setup options, such as paper size, margins, header, and footer, click . These setup options will not be saved. To change page setup options for a report permanently, use the Report Editor.

To set the default printer, paper size, and page orientation, click .

To magnify the display size, click .

To reduce the display size, click .

To display the first page of the report, click .

To display the previous page of a two-page horizontal spread, click .

To display the next page of a two-page horizontal spread, click .

To display the previous page of the report, click .

To display the next page of the report, click .

To display the last page of the report, click .

Tip

- ▶ You can copy or save the current page displayed in the Print Preview window. Right-click and choose Copy or Save As. Copy saves the page to the clipboard. Save As enables you to choose a file format and specify where you want to save the file.

Note: International characters that are not supported by the default font, Microsoft Sans Serif, or Times New Roman, may appear correctly.

Print a report

Use this task to preview and print reports and to save reports as text or HTML files. You can also use this task to compile and Email a report, and to compile a report and create a WP & Docs record for the report. Creating a WP & Docs record for the report allows that report to be accessed from the WPs & Docs window. When P6 Professional is connected to a P6 EPPM database, reports can also be accessed from the Project Documents portlet and the Projects, Documents page in P6.

When P6 Professional is connected to a P6 Professional database:

- 1) From the Reports window, select the report and click  on the Reports toolbar, or right-click on the report and choose Run, Report.
- 2) Proceed as follows:
 - a. To preview the report before printing it, choose Print Preview.
 - b. To print the report, choose Directly to Printer.
 - c. To generate the report and attach it to an Email, choose Email Attachment. If you select this option, go to substep f.
 - d. To save the report as an HTML file, choose HTML File. In the Output file field, click  and select a location to save the report file. If you choose Create WP & Docs record, below, select a network location or some other publicly accessible location. To open the report text file in your default HTML viewer when it is finished compiling, mark the View file when done checkbox.
 - e. To save the report as a delimited text format (.txt) file, choose ASCII Text File and select a Field Delimiter and Text Qualifier. In the Output File field, click  and select a location to save the report file. If you choose Create WP & Docs record, below, select a network location or some other publicly accessible location. To open the report text file in your default TXT viewer when it is finished compiling, mark the View file when done checkbox.
 - f. In the Notes field, you can type report comments. The comments you enter are printed and saved in the report. The next time you run a report, you can clear or edit the Notes field. If you choose Email Attachment, the content in this field is copied to the body of the Email.
 - g. Click OK. If you chose Email Attachment, clicking OK launches the default Email application and attaches the report to a new Email.

When P6 Professional is connected to a P6 EPPM database:

- 1) From the Reports window, select the report and click  on the Reports toolbar, or right-click on the report and choose Run, Report.
- 2) Proceed as follows:
 - a. To preview the report before printing it, choose Print Preview.
 - b. To print the report, choose Directly to Printer.
 - c. To generate the report and attach it to an Email, choose Email Attachment. If you select this option, go to substep g.

- d. To save the report as an HTML file, choose HTML File. In the Output file field, click  and select a location to save the report file. If you choose Create WP & Docs record, below, select a network location or some other publicly accessible location. To open the report text file in your default HTML viewer when it is finished compiling, mark the View file when done checkbox.
- e. To save the report as a delimited text format (.txt) file, choose ASCII Text File and select a Field Delimiter and Text Qualifier. In the Output File field, click  and select a location to save the report file. If you choose Create WP & Docs record, below, select a network location or some other publicly accessible location. To open the report text file in your default TXT viewer when it is finished compiling, mark the View file when done checkbox.
- f. To create a WP & Docs record for this report, choose Store report in Work Products and Documents for this project.
Note: To create a WP& Doc record for a report, only a single project can be open, and you must have the Add/Edit/Delete Project Work Products and Documents privilege for the open project.
- g. In the Notes field, you can type report comments. The comments you enter are printed and saved in the report. The next time you run a report, you can clear or edit the Notes field. If you choose Store report in Work Products and Documents for this project, the content in the Notes field is copied to the Description for the WP & Docs record. If you choose Email Attachment, the content in this field is copied to the body of the Email.
- h. Click OK. If you chose Store report in Work Products and Documents for this project, clicking OK generates the report and creates a WP & Docs record that has the same name as the Output file name. If you chose Email Attachment, clicking OK launches the default Email application and attaches the report to a new Email.

Note

- ▶ When you print the report as an HTML file or ASCII Text File, page breaks are not shown.

Copy a report

- 1) In the Reports window, select the report you want to copy.
- 2) Choose Edit, Copy.
- 3) If you want to copy the report to a specific report group, click the Display Options bar and select Group and Sort By, Report Group. Select the report group to which you want to add the copy.
- 4) Click Paste.
- 5) To rename the report copy, click in the Report Name column, then type a new name.

Import a report

You can only import reports in Report Definition Files (. ERP) format.

- 1) Choose Tools, Reports, Reports.

- 2) To import a report to a specific group, select the report group. To overwrite an existing report, select the appropriate report.
- 3) Click  on the Reports toolbar, or right-click on the selected report or report group, then choose Import.
- 4) If you did not select a report group, choose whether you want to create a new report or overwrite the selected report.
- 5) Locate and select the . ERP report file you want to import.
- 6) Click Open.

Notes

- ▶ If you import a report that was created by the Report Wizard, it will be imported as a standard (non-wizard) report and cannot be modified using the Report Wizard.

Export a report

- 1) Choose Tools, Reports, Reports.
- 2) Select the report, then click  on the Reports toolbar, or right-click on the report and choose Export.
- 3) Select the drive and folder in which you want to save the report's export file.
- 4) In the File Name field, type a name for the export output file, without a file extension.
- 5) In the Save As Type field, select Report Definition Files (*. ERP), if not already selected.
- 6) Click Save.

Note

- ▶ You can only export reports in Report Definition Files (. ERP) format.

Delete a report

- ▶ From the Reports window, select the report. Choose Edit, Delete, then click Yes.

Note

- ▶ When connected to a P6 Professional database: To delete a global report, you must have Edit Global Reports privileges. To delete a project report, you must have Edit Project Reports privileges.

When connected to a P6 EPPM database: To delete a global or project report, you need the appropriate global or project privileges as defined in P6.

Format numbers in reports

You can format numbers in reports using the Report Wizard. When prompted on the Report Generated screen of the Report Wizard, select the Format Numbers option to:

- ▶ Show labels for all duration and unit fields
- ▶ Show the currency symbol for currencies/costs
- ▶ Show averaging labels and divide-by factors for time-based resource and cost data.

Notes

- ▶ The Format Numbers option is selected by default.
- ▶ If you intend to save this report in CSV format for spreadsheet analysis in another application, make sure the Format Numbers option is not selected.

Create default headers, footers, and custom labels for reports (P6 EPPM Only)

You can define three default sets of headers, footers, and custom labels for reports.

These defaults apply to all projects and can be viewed by all users, but you must have Add/Edit/Delete Global Reports global privilege, as defined in P6, to edit them.

- 1) Choose Tools, Reports, Report Preferences.
- 2) On the Report Preferences dialog box:
 - a. Click the first, second, or third set option, as applicable.
 - b. Type the default header for a report in the Header Label field.
 - c. Type the default footer for a report in the Footer Label field.
 - d. Type the default custom label for a report in the Custom Label field.
 - e. Repeat this step for the second or third set, as applicable.
 - f. Click Close.

Working with Report Groups

Create a report group

When connected to a P6 Professional database: To create a report group, you must have Edit Global Reports privileges.

When connected to a P6 EPPM database: To create a report group, you must have the appropriate global privilege as defined in P6.

- 1) Choose Tools, Reports, Report Groups.
- 2) Click Add, then type the name of the new report group.

To change the position of the new report group in the report group structure, click the appropriate arrow buttons.

Edit a report group

- 1) Choose Tools, Reports, Report Groups.

2) Select the report group you want to change.

To change the report group's name, double click the report group, then type a new name.

To change the report group's position in the report group hierarchy, click the appropriate arrow button.

To copy the report group to another position in the report group hierarchy, click Copy, select the report group to which you want to add the copy, then click Paste.

To cut and paste the report group to a different position in the report group hierarchy, click Cut, select the report group to which you want to add the cut report group, then click Paste.

Note

- ▶ The maximum number of report group levels is unlimited. You can create any number of report groups in each level.

Add a report to a report group

- 1) Choose Tools, Reports, Reports.
- 2) Click the Display Options bar and select Group and Sort By, Report Group.
- 3) Select the report you want to add to a report group, then in the Report Group field, click .
- 4) Double-click the group to which you want to add the report.

Remove a report from a report group

- 1) Choose Tools, Reports, Reports.
- 2) Click the Display Options bar and select Group and Sort By, Report Group.
- 3) Select the report you want to remove, then, in the Report Group field, click .
- 4) To remove the report from the group without assigning it to a different group, click Clear. The report is moved to the No Report Group section.

To move the report to a different group, select the new group, then click Select.

Tip

- ▶ You can also use the cut, copy, and paste commands on the Edit menu or Edit toolbar to move reports among report groups.

Delete report groups

When connected to a P6 Professional database: To delete report groups, you must have Edit Global Reports privileges.

When connected to a P6 EPPM database: To delete report groups, you must have the appropriate global privileges as defined in P6.

- 1) Choose Tools, Reports, Report Groups.

- 2) Select the report group you want to delete.
- 3) Click Delete, then click Yes.

Note

- ▶ Deleting a report group that contains reports will merge those reports into the parent report group. A top-level report group that contains reports cannot be deleted until all reports have been removed from that report group and all its subgroups.

Working with Report Batches

Create a report batch

- 1) Choose Tools, Reports, Batch Reports.
- 2) Choose the type of report batch to create.

Choose Global for a report batch that is not project-specific.

Choose Project for a report batch for the open project. This option is not available if no projects are open.

- 3) Click Add, then type the name of the new report batch.

If multiple projects are open, select the project for which you want to create a batch report.

Add a report to a report batch

- 1) Choose Tools, Reports, Batch Reports.
- 2) Choose the type of batch to which you want to add a report.

Choose Global to add a report to a global report batch. You can add only global reports to a global report batch.

Choose Project to add a report to a project-report batch. You can add only project reports to a project report batch. This option is not available if no projects are open.

- 3) In the Batch Report section, select the batch report to which you want to add the report.
- 4) In the Reports section, click Assign.
- 5) Select one or more reports that you want to add to the report batch, click Assign, then click Close.
- 6) In the Reports section, click the arrows to change the position of the reports in the batch. Reports will be processed in the listed sequence when you run the report batch.

Remove a report from a report batch

When connected to a P6 Professional database: To remove a report from a report batch, you must have Edit Global Reports privileges, for global report batches, and Edit Project Reports privileges, for project report batches.

When connected to a P6 EPPM database: To remove a report from a report batch, you must have the appropriate global privileges for global report batches, as defined in P6, and the appropriate project privileges for project report batches, as defined in P6.

- 1) Choose Tools, Reports, Batch Reports.
- 2) In the Reports section, select the report you want to remove from the report batch, click Remove, then click Yes.

Delete a report batch

When connected to a P6 Professional database: To delete a report batch, you must have Edit Global Reports privileges, for global report batches, and Edit Project Reports privileges, for project report batches.

When connected to a P6 EPPM database: To delete a report batch, you must have the appropriate global privileges for global report batches, as defined in P6, and the appropriate project privileges for project report batches, as defined in P6.

- 1) Choose Tools, Reports, Batch Reports.
- 2) Choose the type of report batch to delete.

Choose Global for a report batch that is not project-specific.

Choose Project for a report batch from the open project

- 3) Select the report batch you want to delete, click Delete, then click Yes.

Note

- ▶ Reports assigned to a batch report are not deleted when their batch report is deleted. Those reports are simply no longer associated with a batch report.

Print a report batch

Use this task to print and to save report batches as text or HTML files. You can also use this task to compile and Email a report batch, and to compile a report batch and create a WP & Docs record for the report batch. Creating a WP & Docs record for the report batch allows that report to be accessed from the WPs & Docs window. When P6 Professional is connected to a P6 EPPM database, reports can also be accessed from the Project Documents portlet and the Projects, Documents page in P6.

When P6 Professional is connected to a P6 Professional database:

- 1) Choose Tools, Reports, Reports.

- 2) Click  on the Reports toolbar, or right-click anywhere in the Reports window and choose Run, Batch.
- 3) Select the report batch you want to run, then click OK.
- 4) Proceed as follows:
 - a. To print the report, choose Directly to Printer.
 - b. To compile the report batch and attach it to an Email, choose Email Attachment. If you select this option, go to substep e.
 - c. To save the report batch as an HTML file, choose HTML File. In the Output File field, click  and select a location to save the report batch's filename and location.
 - d. To save the report batch as a delimited text format (.txt) file, choose ASCII Text Files and select a Field Delimiter and Text Qualifier. In the Output File field, click  and select a location to save the report batch's filename and location. Use the ASCII Text Files option to import the report batch to a spreadsheet application.
 - e. In the User's Notes field, you can type report comments corresponding to the report batch. If you choose Email Attachment, the content in this field is copied to the body of the Email.
 - f. Click OK. If you chose Email Attachment, clicking OK launches the default Email application and attaches the report batch to a new Email.

Tip

- ▶ You can set up a job service to run a batch report at a specified time.

When P6 Professional is connected to a P6 EPPM database:

- 1) Choose Tools, Reports, Reports.
- 2) Click  on the Reports toolbar, or right-click anywhere in the Reports window and choose Run, Batch.
- 3) Select the report batch you want to run, then click OK.
- 4) Proceed as follows:
 - a. To print the report, choose Directly to Printer.
 - b. To compile the report batch and attach it to an Email, choose Email Attachment. If you select this option, go to substep f.
 - c. To save the report batch as an HTML file, choose HTML File. In the Output File field, click  and select a location to save the report batch's filename and location. If you choose Store report in Work Products and Documents for this project, below, select a network location or some other publicly accessible location.
 - d. To save the report batch as a delimited text format (.txt) file, choose ASCII Text Files and select a Field Delimiter and Text Qualifier. In the Output File field, click  and select a location to save the report batch's filename and location. If you choose Store report in Work Products and Documents for this project, below, select a network location or some other publicly accessible location. Use the ASCII Text Files option to import the report batch to a spreadsheet application.
 - e. To create a WP & Docs record for this report batch, choose Store report in Work Products and Documents for this project.

Note: To create a WP& Doc record for a report, only a single project can be open, and you must have the Add/Edit/Delete Project Work Products and Documents privilege for the open project.

- f. In the User's Notes field, you can type report comments corresponding to the report batch. If you choose Store report in Work Products and Documents for this project, the content in the User's Notes field is copied to the Description for the WP & Docs record. If you choose Email Attachment, the content in this field is copied to the body of the Email.
- g. Click OK. If you chose Store report in Work Products and Documents for this project, clicking OK compiles the report batch and creates a WP & Docs record that has the same name as the Output File name. If you chose Email Attachment, clicking OK launches the default Email application and attaches the report batch to a new Email.

Tip

- ▶ To run reports unattended at a specified time, see "Run a report batch from the command line."

Note

- ▶ When you print the report as an HTML file or ASCII Text File, page breaks are not shown.

Run a report batch from the command line

You can use the Windows command line interface to run batch reports as a service.

To use the Windows command line interface to run batch reports as a service, do the following:

- 1) Using a text editor, or any program that can save text files, create an actions.config file that specifies the batch report you want to run.

You can specify more than one import action in a single file, by including multiple <action> nodes.

The following is a sample actions.config file that drives the run of one batch report. All tags must appear in the file; however, you can leave some tags empty, as noted below. Values in bold are literal values you must enter as shown. The other values are samples that will vary with your configuration.

When connected to a P6 EPPM database:

```
<actions>
  <action>
    <type>batchrpt</type>
    <BatchReportName>Project Weekly Reports</BatchReportName>
    <Projects>
      <ProjectID>Highway Project</ProjectID>
    </Projects>
    <outputtype>html</outputtype>
    <outputFile>C:\batchoutput.htm</outputFile>
```

```
<outputFieldDelimiter>,</outputFieldDelimiter>
<outputTextQualifier>"</outputTextQualifier>
<StoreReport>Y</StoreReport>;
</action>
</actions>
```

When connected to a P6 Professional database:

```
<actions>
  <action>
    <type>batchrpt</type>
    <BatchReportName>Project Weekly Reports</BatchReportName>
    <Projects>
      <ProjectID>Highway Project</ProjectID>
    </Projects>
    <outputtype>html</outputtype>
    <outputFile>C:\batchoutput.htm</outputFile>
    <outputFieldDelimiter>,</outputFieldDelimiter>
    <outputTextQualifier>"</outputTextQualifier>
  </action>
</actions>
```

Tag	Description
<type>	Required. The type of action to take. This is case sensitive. Valid values: batchrpt
<BatchReportName>	Required. The name of the batch report that is configured in P6 Professional or P6 EPPM.
<ProjectID>	Optional. A project against which to run the report. Leave this tag pair empty to run a global report. Use a separate pair of tags for each Project, for example: <ProjectID>Highway Project</ProjectID> <ProjectID>RSCD</ProjectID> Valid values: Any existing project ID, empty. Do not use an EPS ID.
<outputtype>	Required. What type of output to use for the report. Valid values: html , text , or printer .
<outputFile>	Required. The path for the output file. For example:

Tag	Description
	<outputFile>C:\Temp\batchoutput.htm</outputFile>
<outputFieldDelimiter>	The character the report should use to separate fields. Required when <outputtype> is set to text. Optional when <outputtype> is set to html or printer. Valid values: comma (,), semicolon (;), vertical bar (), a tab character, or a space character.
<outputTextQualifier>	The character the report should use to enclose text strings. Required when <outputtype> is set to text. Optional when <outputtype> is set to html or printer. Valid values: quotation marks ("), apostrophe ('), or none.
<StoreReport>	Determines whether the report should be stored. Not case sensitive. Required when P6 Professional is connected to a P6 EPPM database. Optional when P6 Professional is not connected to a P6 EPPM database. Valid values: Y for yes, N for no. Defaults to no if the tag is not found or a value other than Y or y is set. A message "Warning: Store report to Work Products and Documents disabled." is logged if the value is set to Y or y and any of the following is true: ▶ The <Project ID> tag value is blank. ▶ Multiple <Project ID> tags are set. ▶ You do not have the privilege to Add/Edit/Delete WPs & Docs. ▶ The <outputtype> tag value is set to printer.

Note:

If you include non-English characters in the actions.config file, save the file as Unicode and use the XML encoding attribute to specify the language, prior to the <actions> tag. For example, to specify German or French encoding:

```
<?xml version="1.0" encoding="windows-1252"?>
```

If you are using a batch file, use the chcp command to specify the appropriate language encoding. See Microsoft.com for more Internationalization details.

- 1) Close P6 Professional if it is running.
- 2) On the Windows command line, in a batch file, or in code, issue a command in the following form from the folder where Primavera.CacheService.exe is located:

```
Primavera.CacheService.exe /username=<name> /password=<name> /alias=<name>  
/actionScript=<path> /pmlogfile=<path>
```

Parameter	Description
/username=<name>	Required. The username to log in to P6 Professional.
/password=<name>	Required. The password for the username.
/alias=<name>	Optional. The name of an existing destination database alias. If you do not specify an alias, the most recently accessed alias is used.
/actionScript=<path>	Required. The full path to the edited actions.xml file. Must include the file name.
/pmlogfile=<path>	Optional. The full path for creating the log file that contains processing results, up to and including the file name. If the logfile is not set, the default log file destination is PrimaveraCmdLineLog.txt in the Primavera.CacheService.exe application folder.

For example:

```
Primavera.CacheService.exe /username=ResnerW /password=59dJxJQx /alias=PMDB  
/actionScript=actions.config /pmlogfile=c:\ReportLog.txt
```

Note:The entire string must be entered on one line.

If any values include spaces, enclose the value in quotation marks ("").

If the batch report runs successfully, then an exit code of 0 is returned. If the batch report fails to run, any errors are logged to the log file and an exit code greater than 0 is returned.

Processing results are written to the log file, or you can echo them to the command line interface. These are the possible results:

Code	Description
0	Success.
1	Invalid alias.
2	Invalid username or password.
3	XML file not found.
4	Invalid action type (did not specify batchrpt).
9	Batch report action failure.
214783647	Unhandled exception, including invalid characters.

If the command does not include all the required parameters, P6 Professional opens.

Using the Report Editor to Modify Reports

Report Editor window

The title bar of the Report Editor window displays the name of the currently selected report.

The Report Editor window contains the following major parts:

- ▶ Toolbar
- ▶ Ruler
- ▶ Left margin
- ▶ Report Canvas

The Report Canvas occupies the majority of the window and is the workspace you use to add and position the components of the report.
- ▶ Right-click menu

Using the toolbar

The toolbar icons have the following functions:



Click this button to create a new report. You are prompted to verify that you want to delete the current report components.



Click this button to add a data source.



Click this button to add a row.



Click this button to add a text cell.



Click this button to add an image cell.



Click this button to add a line cell.



Click this button to preview the report on screen before printing.



Select a report component, then click this button to view or edit its properties. Properties are characteristics of a report component, such as type and field for a text cell, sort and group options for a data source, and height for a row.

Tip

- ▶ You can also right-click on a component to view its properties.



Select this button to run the Report Wizard. Before the wizard opens, you are prompted to verify that you want to delete the current report components.

Using the ruler

The ruler indicates the horizontal position of each report component. A blue, shaded area indicates the position and width of the selected cell. A red, vertical bar indicates your cursor's position on the Report Canvas.

Using the left margin

The left margin helps you identify each data source and row. To help you identify data sources, the left margin displays each data source's name and grouping, if any, in the upper-left corner of the data source area. To help you identify rows, the left margin displays each row's type in the upper-left corner of the row. The  symbol indicates rows that are part of a header area. The  symbol indicates rows that are part of a footer area.

Using the Report Canvas

You use the Report Canvas to add report components, to specify where you want components to be positioned, and to select existing components and view or edit their *properties*. Properties are characteristics of a report component, such as type and field for a text cell, sort and group options for a data source, and height for a row.

- ▶ To select a component, click on it; a blue border surrounds the selected component. To increase the scope of the selected area, press Esc. For example, if a text cell within a row is selected, press Esc to select the entire row. If the row is contained within a data source, press Esc again to select the data source that contains the row.
- ▶ To view or edit the properties of a report component, double-click the component.

The Report Canvas contains several standard areas, which appear in any new report:

Page Header Area: This area contains report components that appear at the top of each page of the compiled report. You can add rows and variable or custom text cells to the Page Header Area.

The Page Header Area is different than the standard header you specify in the Page Setup dialog box. If you specify a standard header, the standard header is displayed at the top of the page in the compiled report, followed by the report's Page Header.

Report Header Area: This area contains report components that appear before the compiled report's details and on the first page of the report only. You can add rows and cells to the Report Header Area.

Data Source Header Area: Report components that appear before the data source's records in the compiled report. You can add rows and cells to the Data Source Header Area.

Detail Area: This area contains the bulk of the project data that are being reported and is the only area of the report to which you can add a data source. The data source indicates which category of database information the report compiles, for example, activity resource assignments or cost accounts. After selecting a data source, you add rows, and then cells within the rows, to the Detail Area. The cells specify the individual data fields you want to report for the data source you have selected. For example, in the following graphic, the data source is Activities. The row between the Data Source Header and Detail areas contains four field data text cells: Activity ID, Activity Name, Start, and Finish. In this example, the report will list the activity ID, activity name, start date, and finish date for all activities in the open project.

The diagram illustrates the layout of a report canvas. It consists of three main horizontal sections, each with a label in a yellow box. The top section is the 'Data Source Header Area', which contains a single row of four cells: 'Activity ID', 'Activity Name', 'Start', and 'Finish'. Each cell has a small blue square icon to its right. The middle section is the 'Detail Area', which is currently empty. The bottom section is the 'Data Source Footer Area', which is also empty. The entire canvas has a light blue background with a fine grid pattern.

Data Source Header Area			
Activity ID	Activity Name	Start	Finish
Detail Area			
Data Source Footer Area			

For each data source you add to a report, a Data Source Header, Detail Area, and Data Source Footer are added to the Report Canvas. The Data Source Header and Data Source Footer are required as upper and lower borders for the Detail Area.

Data Source Footer Area: Report components that appear after the data source's details in the compiled report. You can add rows and cells to the Data Source Footer Area.

Report Footer Area: Report components that appear after the compiled report's details and on the last page of the report only. You can add rows and cells to the Report Footer Area.

Page Footer Area: Report components that appear at the bottom of each page of the compiled report. You can add rows and cells to the Page Footer Area.

The Page Footer Area is different than the standard footer you specify in the Page Setup dialog box. If you specify a standard footer, the standard footer is displayed in the compiled report at the bottom of the page, after the report's Page Footer.

The Report Canvas provides visual cues to identify some report component properties.

- ▶ Data sources are color-coded. If a data source is embedded, or nested, in a parent data source, each data source displays in a different color. See [Parent Data Source](#).

- ▶ Text cells are coded in the upper-right corner to indicate the type of data they report.
 - ▣ - indicates a Custom Text cell, a cell that contains text you specify.
 - ▣ - indicates a Field Data cell, a cell that compiles and reports information from a database field you specify.
 - ▣ - indicates a Field Title cell, a cell that contains the name of a database field you specify.
 - ▣ - indicates a Variable cell, a cell that reports information related to the overall report, rather than a specific data source, for example, date or page number.
- ▶ Text cells displayed in red indicate that the cell's properties either have not been defined or that they conflict with the properties of the data source that contains the cell.

Note

- ▶ The Report Canvas does not display the actual height, or amount of vertical space, each report component will occupy in the compiled report. To view the report's vertical spacing, preview the report.

Report Editor tasks

- ▶ Add a background image to a report
- ▶ Add a border to a text cell
- ▶ Add a custom text cell to a report
- ▶ Add a data source to a report
- ▶ Add a field data or field title cell to a report
- ▶ Add a line cell to a report
- ▶ Add a report title
- ▶ Add a row to a report
- ▶ Add a variable cell to a report
- ▶ Add an embedded data source to a report
- ▶ Add an image cell to a report
- ▶ Add comments to reports
- ▶ Add HTML links to a text cell
- ▶ Add HTML links to an image cell
- ▶ Change report margins
- ▶ Change text cell color
- ▶ Change the sort order of report records
- ▶ Copy a data source
- ▶ Copy a row
- ▶ Copy and paste cells
- ▶ Cut and paste a data source
- ▶ Cut and paste a row
- ▶ Cut and paste cells

- Define a report header and footer
- Define default text styles for reports
- Define HTML print settings for an image cell
- Define layout options for a data source
- Define page setup options for a report
- Delete a data source filter
- Delete a data source from a report
- Delete a data source that contains embedded data sources
- Delete a line cell from a report
- Delete a row filter
- Delete a row from a report
- Delete a text cell filter
- Delete an image cell from a report
- Disable HTML links in a text cell
- Disable HTML links in image cells
- Filter a data source
- Filter a report row
- Filter a text cell
- Format text in a text cell
- Indicate hierarchy levels in reports
- Remove a background image from a report
- Remove borders from a text cell
- Show time distributions in a report
- Sort report records
- Specify a timeperiod for a report
- Specify image cell width and position in a row
- Specify line cell width and position in a row
- Specify text cell width and alignment in a row

Basic Procedures

Copy and paste cells

- 1) In the Report Editor window, right-click the cell you want to copy and choose Copy.
- 2) Right-click the row in which you want to paste the copied cell and choose Paste.

To paste the cell to a row that contains other cells, select a cell in the row, press the keyboard Esc key, then press Ctrl+V.

Cut and paste cells

- 1) In the Report Editor window, right-click the cell you want to cut and paste and choose Cut.

- 2) Right-click the row in which you want to paste the cut cell and choose Paste.

To paste the cell to row that contains other cells, select a cell in the row, press the keyboard Esc key, then press Ctrl+V.

Add a report title

- 1) From the Reports window, select the report and click Modify.
- 2) To add a row for the title, click in the Page Header Area of the Report Canvas, then click . Type a new height or click the color button to specify a new row color.
- 3) To add a text cell, click . In the Cell Type field, select Variable. In the Cell Variable field, select Report Title. In the Font Style field, select one of the available default heading fonts.
- 4) Click the Report tab. In the Title field, type the report's title.

Tip

- ▶ To center the report title on the page, in the Align Cell and Text Alignment fields, choose Center.

Define default text styles for reports

You can define six default font styles for report text cells: three heading styles and three body styles.

- 1) With the Reports window active, click  on the Reports toolbar, or right-click on the report and choose Modify.
- 2) Click , then click Report Font Styles.
- 3) Select the style you want to define, click Modify, then select the formatting options you want to apply to the style.

Define a report header and footer

You can define a standard multi-section header and footer that will appear on the first page, last page, or every page of a report.

- 1) With the Reports window active, click  on the Reports toolbar, or right-click on the report you want to edit and click Modify.
- 2) Click , then click the Report tab.
- 3) Click Page Setup, then select the Header tab.
- 4) In the Divide Into Sections field, select the number of sections to divide the header into.
- 5) Choose First Page, Last Page, All Pages, or No Pages from the Include on drop-down menu to specify the pages where the header will be printed.
- 6) Mark the Show Section Divider Lines checkbox, if available, to display divider lines between sections in the header.
- 7) In the Define header section, select the subject area for each section from its corresponding drop-down menu. To leave the section below the selected header grid blank, choose None.

- 8) To edit the contents of the selected header section, click Modify under the Add Text area:
 - a. To add a text variable, select a global variable in the drop-down list below the text area and click Add Variable. When connected to a P6 Professional database, global variables include data such as current project properties (Project Name, Project Start, Data Date, and so on) and Admin Preferences (Header / Footer / Custom Label 1 / 2 / 3). When connected to a P6 EPPM database, global variables include data such as current project properties (Project Name, Project Start, Data Date, and so on) and Application Settings in P6. You can add more than one text variable.
 - b. Enter custom text in the text area of the Text/Logo window. Do not modify variable fields (text between square brackets).

To change the font, click , specify the font settings, and click OK.

To add a logo, click . In the Picture Source field, click Browse, select a filename, and click Open. The logo image is displayed in the text area of the selected header section.

- c. Click OK to return to the Page Setup window.
- 9) To add dates, approvals, and revision information, choose a header section and select Revision Box from the corresponding drop-down list. Enter a title in the Revision Box Title field. Click Add to insert a new row in the revision box. In the Date column, click , then select a date. Enter information in the Revision, Checked, and Approved columns, or leave it blank so information can be entered manually. Click Delete to remove the selected row. Click Font to specify the font settings, and click OK.
- 10) To add pictures, choose a header section and select Picture from the corresponding drop-down list. In the Select Filename field, click  and select the picture file you want to add. Mark the Resize Picture to Fit the Section checkbox to show the complete picture in the section.
- 11) To add stored images, choose a header or footer section and select Stored Image from the corresponding drop-down list. The default image will be used. If you want to use a different stored image click  to select a different image.
- 12) Click the Footer tab. Repeat the preceding steps.

Note

- ▶ To add a header and footer only for the current report, preview the report and use the Page Setup dialog box to specify the header and footer. When you add a header and footer from the Page Setup dialog box, they are applied only to the current printing.

Tip

- ▶ To define a standard report header and footer or any other Page Setup properties for multiple reports, create a report that is empty except for the header and footer. Use the empty report as a template to create other reports by making a copy of it in the Reports window. Rename the copied report and open it in the Report Editor to define the components.

Define page setup options for a report

- 1) With the Reports window active, click  on the Reports toolbar, or right-click on the report and choose Modify.
- 2) Click , then click the Report tab.
- 3) Click Page Setup and specify the orientation, scaling, and paper size options.

Note

- ▶ To define page setup options only for the current report, preview the report and use the Page Setup dialog box. When you specify page setup options from the Page Setup dialog box, they are applied only to the current printing.

Change report margins

- 1) With the Reports window active, click  on the Reports toolbar, or right-click on the report and choose Modify.
- 2) Click , then click the Report tab.
- 3) Click Page Setup, then click the Margins tab.

To change a margin, type a new size.

Top and bottom margins specify the distance between the top or bottom edge of the paper and the top or bottom edge of the report text, not including the header or footer.

Header and footer margins specify the distance between the top or bottom edge of the paper and the top or bottom edge of the report header or footer, respectively. The header margin cannot be greater than the top margin and the footer margin cannot be greater than the bottom margin.

Note

- ▶ To change report margins only for the current report, preview the report and use the Page Setup dialog box. When you change report margins from the Page Setup dialog box, they are applied only to the current printing.

Add a background image to a report

- 1) In the Reports window, select the report and click Modify.
- 2) Click , then click the Report tab.
- 3) Click Background Image, then click Load.
- 4) Select the image file, click Open, then click OK.

Notes

- ▶ BMP and JPG files are supported.
- ▶ If the background image is smaller than the report's page, the image tiles, or repeats, to fill the report's background area.

- ▶ If the background image is larger than the report's page, the image positions in the upper-left corner of the report page, then excludes those areas of the image that do not fit within the report's right and bottom margins.

Remove a background image from a report

- 1) In the Report Editor, click , then click the Report tab.
- 2) Click Background Image, click Clear, then click OK.

Add comments to reports

You can add comments to reports in two ways.

- ▶ Add comments as custom text in a custom text cell.

Custom text cells are useful for comments you do not need to update frequently. To edit the contents of a custom text cell, you need to modify the report.

- ▶ Add comments when you run the report.

Comments that you enter when you run a report are saved, but you can easily edit these comments in the Run Report dialog box the next time you run a report.

Add comments when running a report

All reports created with the wizard automatically include a row that contains the variable text cell Notes, which corresponds to the Notes field of the Run Report dialog box. When you run a wizard report, the comments you enter in the Notes field are printed in the report and saved. These comments are included each time you run the same report or another report, unless you clear or edit the Notes field.

- 1) With the Reports window active, select the report and click  on the Reports toolbar.

You can also right-click on the report and choose Report, Run.

- 2) In the Notes field, type your comments.

Tip

- ▶ For the comments you enter in the Notes field to be included in the printed report, the report must include the variable text cell Notes. If you edited a wizard report and removed the variable Notes field, use the following steps to restore it.
- 1) With the Reports window active, click  on the Reports toolbar.

You can also right-click on the report and choose Modify.

- 2) To add a row for comments, click in the area of the Report Canvas where you want the comments to appear, then click . You can type a new height or click the color button to specify a new row color.
- 3) To add a text cell to the row, click . In the Cell Type field, select Variable. In the Cell Variable field, select Notes. In the Font Style field, select one of the available default body fonts.

Indicate hierarchy levels in reports

If you are reporting hierarchical information for a data source, you can format the report to indent records according to hierarchy level.

- 1) In the Report Editor window, click the field data text cell whose contents you want to report hierarchically, then click .
- 2) Click the Cell tab, then mark the Indent Cell checkbox.
- 3) Click the Source tab, then mark the Organize Hierarchically checkbox.

Specify a timeperiod for a report

When you define the timeperiod for which you want to report project data, you can also specify various timescale interval and timescale format options for displaying time-distributed data.

- 1) In the Report Editor window, click .
- 2) Click the Report tab, then click Timescale Options.
- 3) In the Timescale Start field, click  and select the report's start date.

To run the report for a specific amount of time following the start date, choose Duration and type a time value. Then, in the Date Interval field, select a time interval for the report's duration. For example, if the Duration is 2 and the Date Interval is weeks, the report will include information for a two-week period following the specified start date. The Date Interval you specify also determines the timescale interval used to display time-distributed data.

To select a specific end date for the report, choose Timescale Finish, click , then select an end date.

- 4) If you select shift as the Date Interval, in the Shift Calendar field, click , then double-click the shift you want to use.

- 5) To specify the date format used to display time-distributed data, select one of the date format options.

To display time intervals according to the standard calendar year, for example, Month/Year, choose Calendar.

To display time intervals according to the fiscal year, for example, FM1/FY2000, FM2/FY2000, choose Fiscal.

To display time intervals according to each week of the year, consecutively, beginning with January, choose Week of the Year.

To display time intervals according to ordinal intervals, based on a start date you specify, for example, Week #-1 (08/May/00), Week #1 (15/May/00), choose Ordinal and type a start date in the Timescale Start field.

- 6) To divide the interval totals by automatic increments, based on the date interval selected, in the Averaging section, mark the Calculate Average checkbox. The Divide Interval Totals By field displays the division increment for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

To base the intervals totals on hours per time period, mark the appropriate checkbox.

Specify a unit of measure for each timeperiod.

Tip

- ▶ You can adjust a report's start or finish date according to a specific time value. Place the cursor at the end of the start or finish date text, then type + or -, followed by the time value and the appropriate timeperiod abbreviation. For example, a start date that is two months prior to the current date appears as "CD-2m" where "m" is the abbreviation for month.

Advanced Procedures

Working with Data Sources

Data sources in reports

Data sources are categories of information. The data source component in the Report Editor corresponds to the subject area you select when you use the wizard to create a report. Examples of data sources are activities, cost accounts, expense categories, and work breakdown structure (WBS).

In the Report Editor, you can add, modify, and delete report data sources. When you add a data source, you also need to identify the fields within that data source that you want to include in the report. For example, to report labor, and nonlabor expenses for cost accounts, specify cost accounts as the data source and labor expenses and nonlabor expenses as the data fields to include in the report.

You can also embed, or nest, a data source within another data source. By embedding data sources, you can outline relationships between different types of information. For example, if you embed an activity data source within a WBS data source, the report lists activity information according to WBS.

Add a data source to a report

A data source defines the category of information you want to include in a report. After you add a data source to a report, you then need to add one or more rows, and cells within the rows, to specify which database fields you want to report for the selected data source. As a very simplified example, to create a report that lists actual costs for all activities, you would select Activities as the data source. Then, within the Activities data source area of the report, you would add a row and, within that row, add a field data cell that corresponds to actual cost.

- 1) In the Report Editor window, click the gray Detail Area, then click .
- 2) Click the Source tab. In the Loop Through field, select the category of information to report in the new data source.
- 3) To further organize the data source information, specify group and sort options.

In the Group By field, select a grouping category. The Group By field lists categories that correspond to the selected data source.

In the Sort area, click Add. Select a sort object, sort field, and sort order, then click OK.

Add an embedded data source to a report

- 1) In the Report Editor window, click the Detail Area of the data source in which you want to embed the new data source, then click .
- 2) Click the Source tab. In the Loop Through field, select the category of information you want to report in the new data source.

The list of available data sources reflects the new data source's relationship to the parent data source.

- 3) To further organize the data source information, specify group and sort options.

In the Group By field, select a grouping category. The Group By field lists categories that correspond to the selected data source.

In the Sort area, click Add. Select a sort object, sort field, and sort order, then click OK.

Copy a data source

- 1) In the Report Editor window, click an area of the data source you want to copy, then press the keyboard Esc key until the entire data source is selected. A blue border indicates the selected area.

- 2) Press Ctrl+C.

To embed the copied data source in another data source, click the Detail Area of the data source in which you want to embed the copy and press Ctrl+V.

To paste the data source without embedding it in another data source, click the gray Detail Area and press Ctrl+V.

Tip

- ▶ You can copy and paste data sources between different reports.

Cut and paste a data source

- 1) In the Report Editor window, click an area of the data source you want to cut, then press the keyboard Esc key until the entire data source is selected. A blue border indicates the selected area.
- 2) Press Ctrl+X.

To embed the cut data source in another data source, click the Detail Area of the data source in which you want to embed the cut data source and press Ctrl+V.

To paste the data source without embedding it in another data source, click the gray Detail Area and press Ctrl+V.

Tip

- ▶ You can cut and paste data sources between different reports.

Define layout options for a data source

- 1) In the Report Editor window, click the data source, then click .
- 2) Click the Source tab. In the Page Break Options field, select where you want to insert page breaks in the compiled report.
- 3) To specify the number of hierarchy levels you want to include in the compiled report, in the Max Level field, type a number. To include all hierarchy levels, type 0.
- 4) To report information in hierarchy order, mark the Organize Hierarchically checkbox.

The Max Level field and Organize Hierarchically checkbox are available only if the data source reports hierarchical information.

- 5) To exclude the data source's report components from the compiled report, if the data source does not produce any records, mark the Hide If Empty checkbox. If you mark the Hide if Empty checkbox and no records exist for the data source, the data source header and footer are also excluded from the compiled report.
- 6) To exclude the records of a parent data source from the compiled report, if its child data sources do not produce any records, mark the Hide Record If No Children checkbox.

Sort report records

To sort a report's records, specify a sort order for one or more of the report's data sources.

- 1) In the Report Editor window, click the data source, then click .
- 2) Click the Source tab, then, in the Sort area, click Add.
- 3) Select a sort object, sort field, and sort order, then click OK.

The list of available sorting fields reflects the sort object you select.

- 4) To sort by additional objects and fields, click Add and repeat step 3.

Change the sort order of report records

You can change the sort order of a report's records by changing the sort settings for one or more of the report's data sources.

- 1) In the Report Editor window, click the data source whose records you want to sort differently, then click .
- 2) Click the Source tab.

To add a new field to the sort order, click Add. Select a sort object, sort field, and sort order, then click OK.

To delete a field from the sort order, select it and click Delete.

To change a sort field's position in the sort order, select it and click the appropriate arrow button.

Filter a data source

You can filter data sources to customize a report so that the report includes only the data you want. For example, you might filter a report to show data only for certain projects within the EPS structure. In this way, you could create one report that includes the same data categories and fields for various users, but tailor each printed report to individual users' projects.

- 1) In the Report Editor window, click the data source, then click .
- 2) Click the Source tab, then click Edit Filter.
- 3) In the Parameter column, select the field you want to use to filter the data.
- 4) In the Is column, select the search condition, or comparison operator.
- 5) In the Value field, type or select the field value you want to use to filter the data.

Delete a data source filter

Data source filters customize a report so that the report includes only a specific subset of the data contained in the data source. To include all records contained in a data source, you can delete the filter.

- 1) In the Report Editor window, click the data source whose filter you want to delete, then click .
- 2) Click the Source tab, then click Edit Filter.
- 3) Select the filter you want to remove, click Delete, then click Yes.

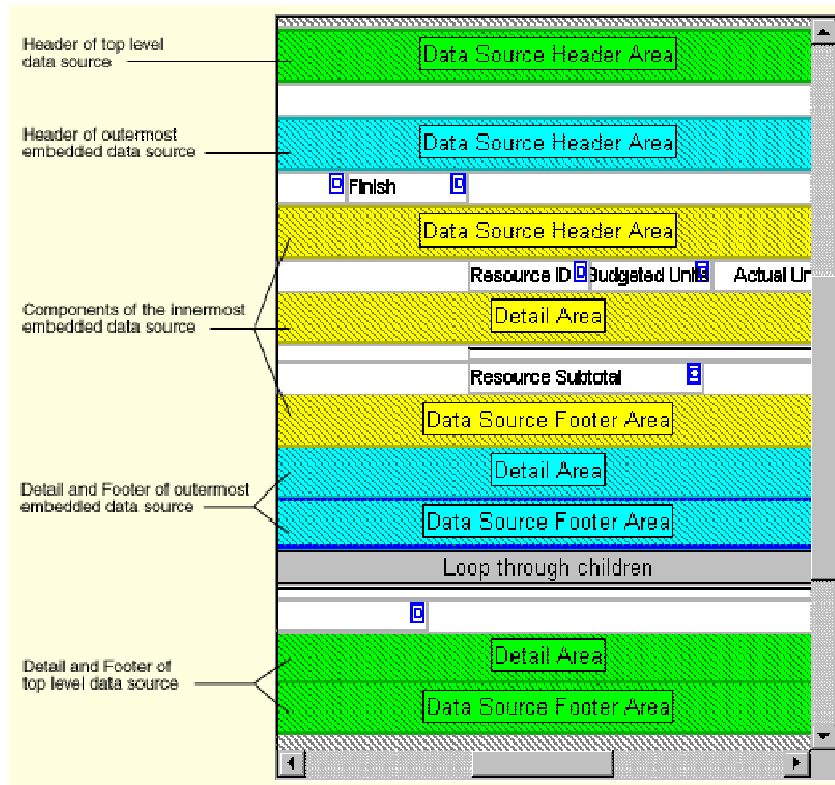
Delete a data source from a report

- 1) In the Report Editor window, click an area of the data source you want to delete, then press the keyboard Esc key until the entire data source is selected. A blue border indicates the selected area.
- 2) Press the keyboard Delete key, then click Yes.

Delete a data source that contains embedded data sources

When a data source contains one or more embedded data sources, you can remove the top-level data source without removing the embedded data sources.

- 1) In the Report Editor window, click a component of the embedded data source, then press the keyboard Esc key until the entire data source is selected. A blue border indicates the selected area.
- 2) If the top level data source contains more than one embedded data source, click in an area of the outermost embedded data source and press Esc until all of the embedded data sources are selected.



- 3) Press Ctrl+X.
- 4) Click a component of the top level data source, press the keyboard Esc key until the entire data source is selected, then press the keyboard Delete key.
- 5) Click the gray Detail Area and press Ctrl+V.

Working with Rows

Add a row to a report

When adding cells to a report, you can insert them in an existing row or add a new row. You can add rows to all areas of the Report Canvas.

- 1) In the Report Editor window, click the report area to which you want to add a row, then click



- 2) Click the Row tab, then type the height of the new row.

To change the row's background color, click the Color button and select a new color.

Tip

- ▶ The Report Editor window does not display the actual height, or amount of vertical space, the row will occupy in the compiled report. To view the row's actual height in the compiled report, click .

Copy a row

- 1) To copy an empty row, right-click the row in the Report Editor window and choose Copy.

To copy a row that contains cells, click a cell in the row. Press the keyboard Esc key until the entire row is selected, then press Ctrl+C.

- 2) Right-click the report area where you want to paste the copied row, then choose Paste.

Cut and paste a row

- 1) To cut an empty row, right-click the row in the Report Editor window and choose Cut.

To cut a row that contains cells, click a cell in the row. Press the keyboard Esc key until the entire row is selected, then press Ctrl+X.

- 2) Right-click the report area where you want to paste the row, then choose Paste.

Filter a report row

- 1) In the Report Editor window, click the row you want filter, then click .
- 2) Click the Row tab, then click Edit Filter.
- 3) In the Parameter column, select the field you want to use to filter the data.
- 4) In the Is column, select the search condition, or comparison operator.
- 5) In the Value field, type or select the field value you want to use to filter the data.

Delete a row filter

- 1) In the Report Editor window, click the row whose filter you want to delete, then click .
- 2) Click the Row tab, then click Edit Filter.
- 3) Select the filter you want to remove, click Delete, then click Yes.

Delete a row from a report

- ▶ To delete an empty row, right-click the row you want to delete from the Report Editor window, choose Delete, then click Yes.

To delete a row that contains cells, click a cell in the row. Press the keyboard Esc key until the entire row is selected, press the keyboard Delete key, then click Yes.

Working with Text Cells**Text cell types**

You can include four types of text cells in a report: Field Title, Field Data, Variable, and Custom Text.

- ▶ Field Title cells contain the name of a database field you specify. Field Title cells are helpful when you want to label a column or another text cell that contains database data. Examples of field titles are WBS Code and Activity Name.
- ▶ Field Data cells contain project information from a database field you specify. For example, if you add a Field Data cell that refers to the field WBS Code, the cell reports codes for WBS elements.
- ▶ Variable cells report information related to the overall report, rather than a specific data source. Report name and page number are examples of variable cell information.
- ▶ Custom Text cells contain custom text you specify.

Add a field data or field title cell to a report

You can add field data and field title cells only within a data source. Therefore, you must first add the data source to the report.

- 1) In the Report Editor window, select the row to which you want to add the cell.
- 2) Click . The icon is a small square with the letters 'AB' inside.
- 3) Click the Cell tab. In the Cell Type field, select Field Title or Field Data.
- 4) In the Cell Object field, select the category of information that contains the database field or field title you want to report in the cell.

The choices in the Cell Object field reflect the data source (table) you specified. If the table is joined to one or more other tables in the database, the full path to the selected data source is displayed. For example: Activity Name \ <activity_name> \ Activity Code \ Project \ Default Cost Account \ Parent Cost Account.

If you change the data source, the list of available field names will also change.

- 5) In the Cell Field field, select the database field or field title you want to report in the cell.

Show time distributions in a report

For some field data and field title cells, for example, units and costs, you can report time-distributed data. You can also specify how you want to see summary data reported across the timescale; for example, you can select to display data for each timescale interval, or period totals only.

- 1) In the Report Editor window, click the text cell whose time distributions you want to show, then click .
- 2) Click the Cell tab. In the Timescale Type field, select the type of data you want to report.
- 3) Mark the Repeat Over Timescale checkbox, then click .
- 4) In the Data Source Header area for the data source that contains the cell, select the row in which you want column labels for the time distributions to appear, then click .
- 5) Click the Cell tab. In the Cell Type field, select Variable.
- 6) In the Cell Variable field, select Column Date.
- 7) Mark the Repeat over Timescale checkbox.

Tip

- ▶ The values distribute according to the date interval, or timeperiod, you specify for the report. To change the date interval, click the Report tab, then click Timescale Options.

Add a variable cell to a report

- 1) In the Report Editor window, select the row to which you want to add a variable cell.
- 2) Click .
- 3) Click the Cell tab, then in the Cell Type field, select Variable.
- 4) In the Cell Variable field, select the type of information you want to report in the cell.

Add a custom text cell to a report

- 1) In the Report Editor window, select the row to which you want to add a custom text cell. If necessary, add a row for the custom text cell.
- 2) Click .
- 3) Click the Cell tab. In the Cell Type field, select Custom Text as the cell type.
- 4) In the Custom Text field, type the text you want to appear in the cell.

Format text in a text cell

- 1) In the Report Editor window, click the text cell, then click .

- 2) Click the Cell tab, then specify the text format options.

To specify the position of the text within the cell boundaries, in the Text Alignment field, select an alignment option.

In the Font Style field, select a default report text style or, to define a custom style, select Custom, then click Custom Font to specify formatting options.

To display the appropriate character to designate time (hours/h days/d), currency (\$), or percentage (%) in value fields, mark the Format Cell Text checkbox. If you do not mark this checkbox, only the numeric value displays in these fields.

Specify text cell width and alignment in a row

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab. In the Align Cell field, select the position you want the cell to occupy in the row:

To use your mouse to drag the cell to the appropriate position in the row, select None.

To position the cell relative to the left margin, select Left, then in the Left field, type the cell's left indent.

To position the cell flush against the right margin, select Right.

To extend the cell across the entire row, select Center.

- 3) In the Width field, type the cell's numeric width, the distance you want the cell to occupy between the report's left and right margins.

If the cell's alignment is Center, you cannot specify the cell width.

Tip

- ▶ You can also change a cell's width directly in the Report Editor window. Select the cell, then position the mouse pointer over the cell's left or right edge. When the pointer changes to a double-headed arrow, drag the cell's edge to a new position.

Change text cell color

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click the Color button.
- 3) Select a color from the Basic Colors palette or define a custom color, then click OK.

Add a border to a text cell

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click Borders.
- 3) Mark the appropriate checkboxes to add borders to the cell.

Note

- ▶ Cell borders always appear in black. You cannot change the border color.

Remove borders from a text cell

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click Borders.
- 3) Clear the appropriate checkboxes to remove the cell's borders.

Add HTML links to a text cell

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click HTML links.
- 3) In the Link Prefix field, type the portion of the Internet address, or URL, that specifies the server location of the file to which you want to link the cell, for example `http://www.yourcompany.com`.
- 4) If you want each report record to be a hot link to another file, mark the Enable Link Field checkbox. Select an object, or category of information, and a field from the Link Object and Link Field lists. The list of available objects and fields reflects the type of information reported by the cell's row.

To disable the link if a specific field does not produce any records in the compiled report, mark the Disable Link If Empty Value checkbox.

- 5) Type the suffix of the Internet address to which you want the selected cell to link. If you chose the Enable Link field option, specify only the filename extension in this field, for example, `.html`. If you did not choose the Enable Link Field option, specify both the filename and extension in this field, for example, `yourfile.html`.
- 6) To create a link to a specific frame in the Web page, if the Web page uses frames, type the URL address of the frame.

Note

- ▶ Both Link Prefix and Link Suffix are always used to build the URL link for the text cell. The Link Prefix identifies the server location of the file to which you want to link the cell. If you choose the Enable Link Field option, then the Link Object and Link Field fields are used to determine the filename, and the Link Suffix field identifies the extension of the file to which you want to link the cell. In this case, the URL is built as follows: [Link Prefix]+[Link Field]+[Link Suffix]. If you do not choose the Enable Link Field option, then the Link Suffix field is used to determine both the filename and extension of the file to which you want to link the cell. In this case, the URL is built as follows: [Link Prefix]+[Link Suffix].

Disable HTML links in a text cell

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click HTML links.
- 3) Clear the Enable Link Field checkbox.

Filter a text cell

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click Edit Filter.
- 3) In the Parameter column, select the field you want to use to filter the data.
- 4) In the Is column, select the search condition, or comparison operator.
- 5) In the Value field, type or select the field value you want to use to filter the data.

Delete a text cell filter

- 1) In the Report Editor window, click the text cell, then click .
- 2) Click the Cell tab, then click Edit Filter.
- 3) Select the filter you want to remove, click Delete, then click Yes.

Delete a text cell from a report

- ▶ In the Report Editor window, right-click the text cell you want to remove, select Delete, then click Yes.

Working with Line Cells

Add a line cell to a report

- 1) In the Report Editor window, select the row to which you want to add a line cell.
- 2) Click .
- 3) Click the Line tab, then type the number of lines you want to appear in the cell.

Specify line cell width and position in a row

- 1) In the Edit Report window, click the line cell, then click .
- 2) Click the Line tab. In the Line alignment field, select the position you want the cell to occupy in the row.

To use your mouse to drag the cell to the appropriate position in the row, select None.

To position the cell relative to the left margin, select Left, then type the cell's left indent in the Left field.

To position the cell flush against the right margin, select Right.

To extend the cell, or line, across the entire row, select Center.

- 3) In the Width field, type the cell's numeric width, the distance you want the cell to occupy between the report's left and right margins.

If the cell's alignment is Center, you cannot enter the cell's width.

Tip

- ▶ You can also change a cell's width directly in the Report Editor window. Select the line cell, then position the mouse pointer over the cell's left or right edge. When the pointer changes to a double-headed arrow, drag the cell's edge to a new position.

Delete a line cell from a report

In the Report Editor window, right-click the line cell you want to delete, select Delete, then click Yes.

Working with Image Cells

Add an image cell to a report

BMP and JPG files are supported.

- 1) In the Report Editor window, select the row to which you want to add an image cell.
- 2) Click .
- 3) Click the Image tab. Click Select Image, then click Load.
- 4) Select the image file, then click Open.

To expand the image to the size of the selected image cell, mark the Stretch Image checkbox.

- 5) Click OK.

Specify image cell width and position in a row

- 1) In the Report Editor window, click the image cell, then click .
- 2) Click the Image tab, in the Image alignment field, select the position you want the cell to occupy in the row.

To use your mouse to drag the cell to the appropriate position in the row, select None.

To position the cell relative to the left margin, select Left, then type the cell's left indent in the Left field.

To position the cell flush against the right margin, select Right.

To extend the cell across the entire row, select Center.

- 3) In the Width field, type the cell's numeric width, or the distance you want the cell to occupy between the report's left and right margins. If the cell's alignment is Center, you cannot enter the cell's width.

Tip

- ▶ You can also change a cell's width directly in the Report Editor window. Select the cell, then position the mouse pointer over the cell's left or right edge. When the pointer changes to a double-headed arrow, drag the cell's edge to a new position.

Add HTML links to an image cell

- 1) In the Report Editor window, click the image cell, then click .
- 2) Click the Image tab, then click HTML Links.
- 3) In the Link Prefix field, type the portion of the Internet address, or URL, that specifies the server location of the file to which you want to link the cell, for example, `http://www.yourcompany.com`.
- 4) If you want each report record to be a hot-link to another file, mark the Enable Link Field checkbox. Select an object, or category of information, and a field from the Link Object and Link Field lists. The list of available objects and fields reflects the type of information reported by the cell's row.

To disable the link if a specific field does not produce any records in the compiled report, mark the Disable Link If Empty Value checkbox.

- 5) Type the suffix of the Internet address to which you want the selected cell to link. If you chose the Enable Link field option, specify only the filename extension in this field, for example, `.html`. If you did not choose the Enable Link Field option, specify both the filename and extension in this field, for example, `yourfile.html`.
- 6) To create a link to a specific frame in the Web page, if the Web page uses frames, type the URL address of the frame.

Note

- ▶ Both Link Prefix and Link Suffix are always used to build the URL link for the image cell. The Link Prefix identifies the server location of the file to which you want to link the cell. If you choose the Enable Link Field option, the Link Object and Link Field fields are used to determine the filename, and the Link Suffix field identifies the extension of the file to which you want to link the cell. In this case, the URL is built as follows: [Link Prefix]+[Link Field]+[Link Suffix]. If you do not choose the Enable Link Field option, the Link Suffix field is used to determine both the filename and extension of the file you wish to link to. In this case, the URL is built as follows: [Link Prefix]+[Link Suffix].

Disable HTML links in image cells

- 1) In the Report Editor window, click the image cell whose HTML link you want to disable, then click .
- 2) Click the Image tab, then click HTML Links.
- 3) Clear the Enable Link Field checkbox.

Define HTML print settings for an image cell

When you print a report to an HTML file and the report includes either background images or image cells, you must specify whether you want to copy the image files to the destination folder of the HTML report or reference the image files. Copying an image file allows you to maintain a consistent HTML folder for the report. If the content of the image files changes frequently, it may be more efficient to reference the files so that they are current when you view the report.

- 1) In the Report Editor window, click the image cell whose HTML settings you want to define, then click .
- 2) Click the Image tab, then click Select Image.

To copy the image file, in the Relative Image Path field, type a location and name for the copied image file, relative to the report's HTML folder. If you do not enter a location, the image automatically copies to the file destination you specify when you print the report to an HTML file.

To reference the image's file, rather than copy the file, mark the Reference Image Instead checkbox. Then, in the Relative Image Path field associated with the checkbox, type the location and name of the image file. Referencing an image's file is helpful when the image's content changes frequently.

Delete an image cell from a report

- ▶ In the Report Editor window, right-click the image cell you want to delete, select Delete, then click Yes.

Producing Graphics

Print features

The print features enable you to create a variety of graphics to support project initiatives.

You can use the Print option to print activity layouts, tracking layouts, and project data displayed in main windows such as Projects, Expenses, and Work Breakdown Structure.

You can also use the Report Wizard to print the data currently displayed in a window and save it as a report. With the Report Wizard, you can also modify the report output from the current window display by adding or deleting data fields or applying a filter. For example, to create a report of project expenses for a particular expense category, display the Expenses window, then use the Report Wizard to filter the data and include only one specific expense category in the report.

Print a layout or window data

- ▶ Display the layout or window you want to print and choose File, Print.

Tip

- ▶ To preview the layout or window before printing, choose File, Print Preview.

Change page setup options

- 1) Choose File, Page Setup.
- 2) To set the page orientation, scaling, and paper size options, click the Page tab and type or select the options you want to use.
- 3) To set page margins, click the Margins tab.

To change a margin, type a new size.

Top and bottom margins specify the distance between the top or bottom edge of the paper and the top or bottom edge of the report text, not including the header or footer.

Header and footer margins specify the distance between the top or bottom edge of the paper and the top or bottom edge of the report header or footer, respectively. The header margin cannot be greater than the top margin and the footer margin cannot be greater than the bottom margin.

- 4) To define the header and footer content, click the Header or Footer tab. In the Divide Into Sections field, select the number of appropriate sections to divide the header or footer into.
- 5) To specify when you want to print the header or footer, choose First Page, Last Page, All Pages, or No Pages in the Include On field.
- 6) In the Define header/footer section, mark the Show Section Divider Lines checkbox to display dividers between each section of the header or footer.

- 7) In the Define header/footer section, select the subject area for each section:

To leave the section below the header/footer grid blank, choose None.

If the Gantt Chart is displayed in the layout, you can choose Gantt Chart Legend to specify the font for the legend. If the Activity Network is displayed in the layout, you can choose Activity Network Legend to specify the font settings.

To add a text variable, choose Text/Logo. From the list, select a global variable and click Add. When connected to a P6 Professional database, global variables include data such as current project properties (Project Name, Project Start, Data Date, and so on) and Admin Preferences (Header / Footer / Custom Label 1 / 2 / 3). When connected to a P6 EPPM database, global variables include data such as current project properties (Project Name, Project Start, Data Date, and so on) and Application Settings in P6. The Header or Footer Sample illustrates how the report header or footer will print. You can add more than one text variable.

You can add your own text to the header or footer, type directly in the text area of the selected header/footer section. Do not modify a variable field, that is, the text between square brackets. To change the font, click , specify the font settings, and click OK. To add a logo, click . In the Picture Source field, click Browse, then select a filename and click Open. The logo image is displayed in the text area of the selected header/footer section.

To add dates, approvals, and revision information, choose Revision Box and enter a title in the Revision Box Title. Click Add to insert a new row in the revision box. In the Date column, click , then select a date. Enter information in the Revision, Checked, and Approved columns, or leave it blank so information can be entered manually. Click Delete to remove the selected row. Click Font to specify the font settings, and click OK.

To add pictures to the header or footer, choose Picture. In the Select Filename field, click  to select the picture file. Mark the Resize Picture to Fit the Section checkbox to show the complete picture in the section.

To add stored images to the header or footer, choose Stored Image. The default image will be used. Click  to select a different image.

- 8) To choose whether you want to print icons and grid lines, to specify which elements of a layout you want to print, and to choose page break options, click the Options tab. Mark the applicable checkboxes.

The choices available on the Options tab vary according to the layout that is currently displayed.

Notes

- ▶ If you are displaying the Activity Network in the layout, you can select Activity Network Legend as the subject area and format the legend.
- ▶ The Options tab is not available for Reports.
- ▶

Select a specific printer to print a layout

Use Print Setup to select a printer other than the current default to print layouts and reports.

- 1) Choose File, Print Setup.
- 2) In the Printer section, select a printer.
- 3) Click Properties to adjust the features and settings for the selected printer.
- 4) In the Paper section, choose the paper settings from a list of available page sizes and paper sources that match the capabilities of the selected printer.
- 5) Choose Portrait or Landscape for the paper orientation.
- 6) Click Network to direct your output to any network print queue.
- 7) Click OK.

Note

- ▶ Only the paper size and orientation is saved when you save a layout and log out of P6 Professional.