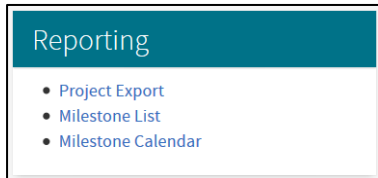


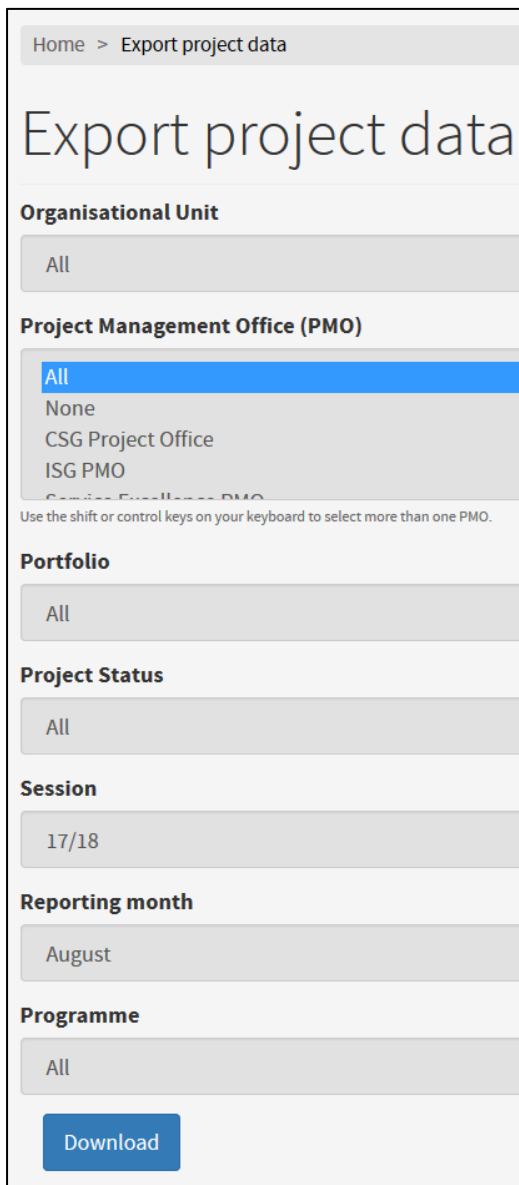
Exporting Project Report Data

Project reporting information can now be accessed by all EASE-authenticated users.

To do this, go to the Projects Website home page and in the 'Reporting' section select 'Project Export'.



Select the filters as required. Only one option can be selected for each heading, apart from 'Project Management Office (PMO)' which allows more than one choice by using the shift or control keys.

A screenshot of the 'Export project data' page in a web application. The page has a breadcrumb trail 'Home > Export project data' at the top. The main heading is 'Export project data'. Below this, there are several filter sections, each with a dropdown menu:

- Organisational Unit**: A dropdown menu with 'All' selected.
- Project Management Office (PMO)**: A dropdown menu with 'All' selected. Below the dropdown, there is a list of options: 'None', 'CSG Project Office', 'ISG PMO', and 'Service Excellence PMO'. A note below the list says 'Use the shift or control keys on your keyboard to select more than one PMO.'
- Portfolio**: A dropdown menu with 'All' selected.
- Project Status**: A dropdown menu with 'All' selected.
- Session**: A dropdown menu with '17/18' selected.
- Reporting month**: A dropdown menu with 'August' selected.
- Programme**: A dropdown menu with 'All' selected.

At the bottom of the page, there is a blue 'Download' button.

Note that only one reporting month can be selected at a time.

Once the required filters have been set, click 'Download'.

If there are no projects found within the set criteria the following error message will display:

No matching projects

If matching projects are found, an Excel spreadsheet will be created that lists all **published** projects. Where a project is **unpublished** (private), this will not appear on list unless the user requesting the download is in the project group.

(Please note, depending on the filters selected, the creation of the spreadsheet could take a few seconds).

The Output

An explanation of each column on the spreadsheet is provided below:

Title Rows:

The first three rows show the following, depending on the filters selected:

	A	B
1	Project Management Offices:	All
2	Programmes:	All
3	Period:	August 2017

Columns:

Org Unit: This is the Organisational Unit selected when the project was created. This can be changed via the project home page. (This is a filter option)

Project Management Office: This is the PMO associated with that project and can be changed via the project home page. (This is a filter option and also displays on row 1.)

Programme: This is the programme to which the project belongs. Note this field may be blank as a project does not have to belong to a programme. (This is a filter option. If used as a filter, this will not appear in the columns but will be shown in row 2.)

Code: The unique project code

Title: Project title

Sponsor: Project Sponsor as named on the project

Manager: Project Manager (PM) as named on the project

Stage: Stage of the project as shown on the project home page. This is not an automatically updated field, it is the responsibility of the PM to keep the stage up to date.

Start Date: Start date of the project as shown on the project home page.

Delivery Date: This is a calculated field taken from the project milestones. Where there is a milestone with the following options selected, the 'target date' of the milestone will be displayed in the spreadsheet:

- 'Stage' = Deliver
- 'End of stage milestone' = Yes
- 'Complete' = Yes or No (not withdrawn)

Where more than one milestone on the same project meets the above criteria, the milestone with the **latest** target date will be displayed in the spreadsheet.

Where there is no milestone on the project that meets the above criteria, the field will be blank.

Close Date: This is the close date as shown on the project home page. If the project is in progress, this field should be blank. It is the actual close date and not a projected closure date.

Report Created Date: This is the date the project report was created for the month and year selected in the filters. If there is no report for this period, the field will be blank.

Previous RAG: If there is a project report for the month prior to the month selected in the filter, a RAG status will be shown. Note if there is more than one report in the previous month, the spreadsheet will show two entries for this project.

Current RAG: If there is a project report for the month selected in the filter, a RAG status will be shown. Note if there is more than one report in this month, the spreadsheet will show two entries for this project.

Issues?: If there is a project report for the month selected in the filter, this field will have a 'No' or 'Yes' populated. If the PM has ticked the 'Open issues?' box, this field will have 'Yes'.

RAG Commentary: If the PM has ticked the 'Open issues?' box on the report, it is expected that there should be a short commentary also added to briefly outline the issues and what is being done to address these.

Funding Source: Optional field on the project home page to record any sources of funding for the project.

URL: This is automatically generated and is the URL for the project home page.

For projects in the Information Services Group, please see the following for further guidance on creating a project report:

[Monthly Reporting Quick Guide](#)

[Update Project Homepage for Monthly Reporting](#)

[Creating a Monthly Project Report](#)