Project List Report

Report Module Guide: Project List Report

Module Location

Project > Reports > Project List

Module Objective

The **Project List Report** module is used to generate a summary report of all projects registered in the system. This report provides a general overview of all projects, their status, the responsible manager, and the related customer.

1. Report Parameters (Filter)

The main page of this module is a form containing various parameters to customize the report that will be generated.

Here is an explanation for each parameter:

- **Project Status**:
  - Filter the report by the current project status (e.g., 'Active', 'Completed', 'Canceled').
- **Customer Name**:
  - Select a specific customer to see all projects related to them, or select 'All'.

2. Steps to Generate the Report

Step 1: Set Report Parameters

Define the **Project Status** or **Customer Name** filters that you need.

Step 2: Generate the Report

After all parameters are set, click one of the two buttons at the bottom:

- **[Display Report]**: To preview the project list report directly on your screen.
- **[Export to MS Excel]**: To download the report data in an Excel file format.

3. Reading the Report (Report Content)

The generated report is a list of all projects that match your filters.

This report displays important details such as:

- **Project Code** and **Project Name**.
- The responsible **Project Manager**.
- The related **Customer Name**.
- **Start Date** and **End Date**.
- The current **Project Status**.

Tips & Important Notes

- This report is a recapitulation of the master data created in the **Project List** module.

- Use this report to get an overview of the company's **project portfolio**.

- This is a useful report for **Top Management and the PMO (Project Management Office)** to monitor all ongoing projects.

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