Technical White Paper

Version 4.6

The Executive Dashboard and EDB Report Tool

This technical white paper is designed for Spitfire Project Management System users. It provides an overview of the Executive Dashboard and details about how to create a template file to organize the data from the Executive Dashboard.

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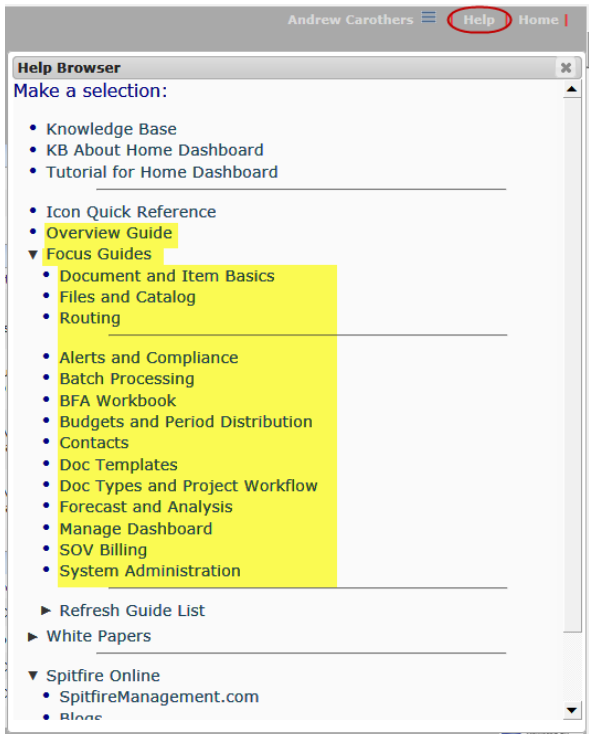
Introduction

This white paper provides an overview of the Executive Dashboard and details about the EDB (Executive Dashboard) Report Tool, which is a supplemental workbook in Microsoft Excel used to create a template file which, in turn, is used to organize the data from the Executive Dashboard.

This white paper assumes you have access to the Executive Dashboard and a basic understanding of sfPMS in general. If not, please read the *Overview Guide* first.

All documentation referred to within this white paper can be found on the Spitfire Help menu.



This white paper also assumes that you have a working knowledge of Microsoft Excel.

Note: New information added to this TWP since V4.4 appears in **green text**. Also, icons are shown in size 16 only; larger icons are similar but not identical.

Permissions

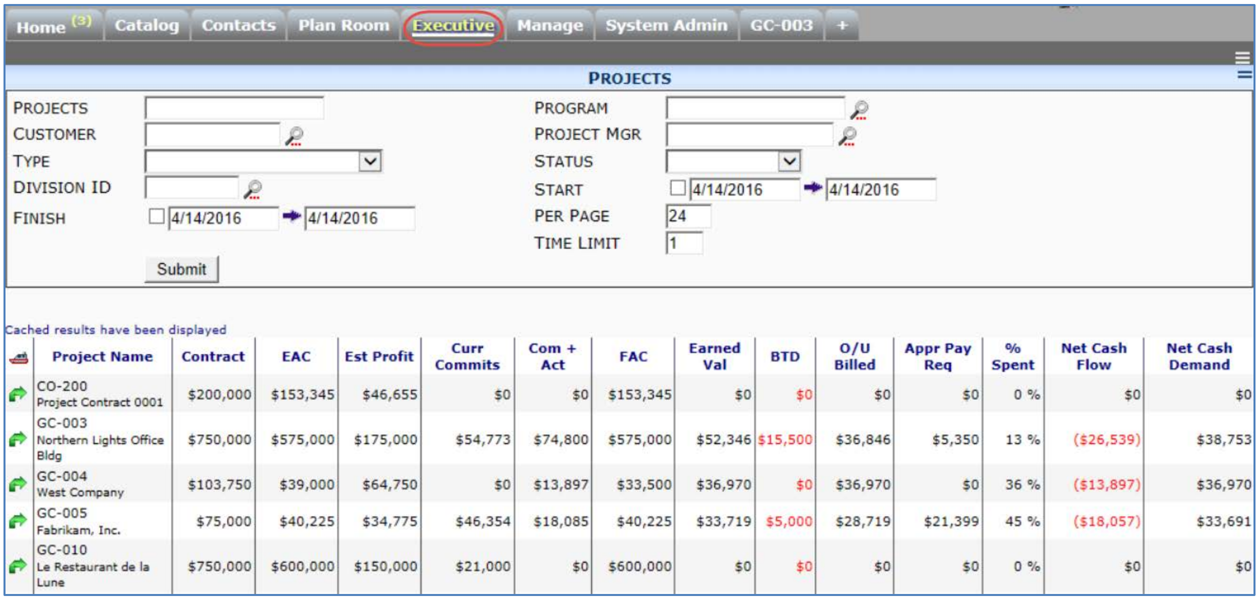
TIP

For more information about roles, see the technical white paper *Designing User Roles*.

Access to the Executive Dashboard and its information is granted through the **PAGE | Executive Dashboard** and **PART | Executive Project Summary** role capabilities. In addition, permission to use the EDB Report Tool is granted through the **PAGE | Executive Dashboard Export** capability. You must have these capabilities in order to see the Executive Dashboard and use the EDB Report Tool described in this white paper.

The Executive Dashboard

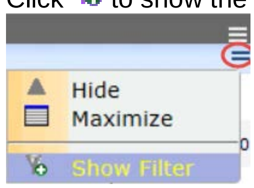
The Executive Dashboard is designed to give company executives an overview of the company's projects.



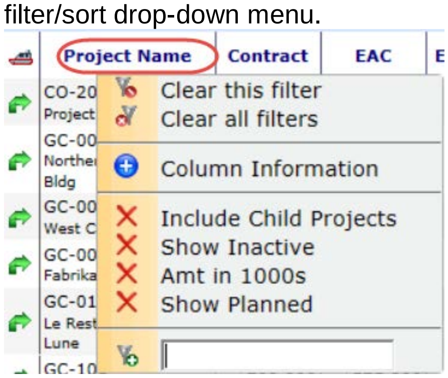
Filters

The Executive Dashboard can be filtered by the various criteria. If the filter part is not visible when you open the Executive Dashboard,

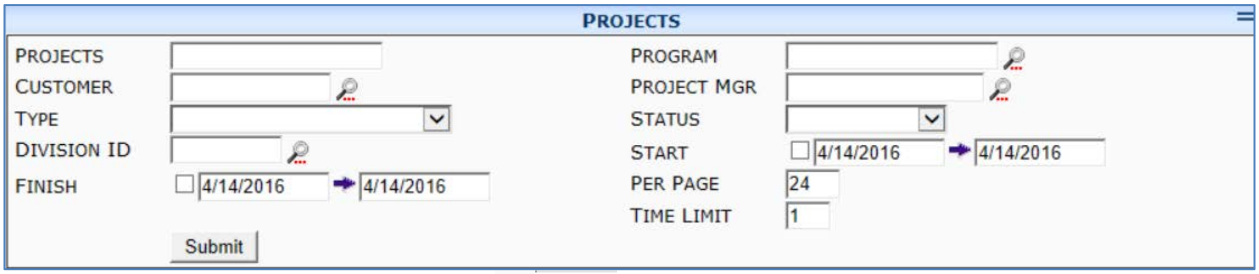
1. Click to open the part menu.
2. Click to show the filters.



The Project Name column also allows you to choose filters from the filter/sort drop-down menu.



Collapsible Filter Part

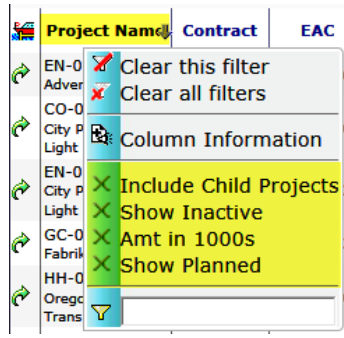


Click the Submit button after entering your filter criteria to get your results.

- **Projects** – Displays only active projects that match the character and wildcard combination entered in the filter field. For example, **GC%** will display projects that begin with GC and **%003** will display projects that end in 003.
- **Program** – Displays the projects within the program that matches the program you look up in this filter field. (For more information about programs, see the *Focus on the Manage Dashboard* guide.)
- **Customer** – Displays the projects with a customer contact (source contact as established on the Project Setup document) that matches whom you type in or look up in this filter field.
- **Project Mgr** – Displays the projects with a project manager (established on the project's team contact list) that matches whom you type in or look up in this filter field.
- **Type** – Displays projects with a Subtype that matches what you select from the drop-down.
- **Status** – Displays projects with a status (on the Project Setup) that matches what you select from the drop-down.
- **Division ID** – Displays projects with a Division ID (on the Project Setup) that matches what you look up in this filter field.
- **Start** – Displays projects with a Start date (on the Project Setup) that falls between the range you select from the calendars, inclusive. **Note**: you must check the checkbox if you want to filter by Start date.
- **Finish** – Displays projects with a Finish date (on the Project Setup) that falls between the range you select from the calendars, inclusive. **Note**: you must check the checkbox if you want to filter by Finish date.
- **Per Page** – Indicates the maximum number of projects that should appear on each page of the Executive Dashboard.
- **Time Limit** – Indicates how many minutes you give the Executive Dashboard to gather its data. 1 minute is the default; 2-3 minutes might be needed if the amount of project data is great.

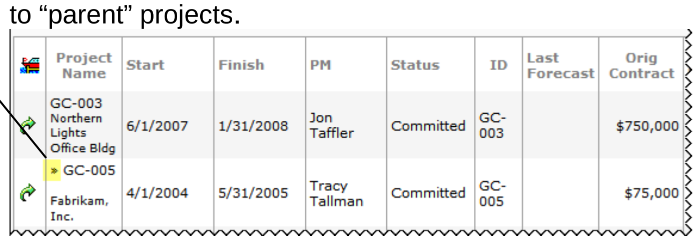
Toggle Filters

If you click on the Project Name header, a sort/filter options menu will appear. Four toggle options are available.



- **Include Child Projects** – Displays "child" projects that are linked to "parent" projects.

Child projects are identified by >>. In this example, GC-005 is a child of GC-003.



Project Name	Start	Finish	PM	Status	ID	Last Forecast	Orig Contract
GC-003 Northern Lights Office Bldg	6/1/2007	1/31/2008	Jon Taffler	Committed	GC-003		$750,000
» GC-005 Fabrikam, Inc.	4/1/2004	5/31/2005	Tracy Tallman	Committed	GC-005		$75,000

- **Show Inactive** – Displays all active and inactive projects (i.e., those that have a status of Committed, Canceled or Completed.)
- **Amt in 1000s** – Displays all numbers, rounded up or down, without the last three digits. For example, $54,773 is displayed as $55.
- **Show Planned** – Displays all planned and active projects (i.e., those that have a status of In Process or Committed.)

Columns

TIP

The Executive Dashboard can be configured through the Project Exec Summary part on the UI Configuration tool on the System Admin Dashboard. See the *Focus on System Administration* guide.

The following columns (shown on the next page) are available for the Executive Dashboard. Columns can be changed (hidden or shown) through configuration or a pop-up dialog (see next section).

To learn how amounts (marked by * below) are calculated, see KBA-01401. To configure these computations, see KBA-01227.

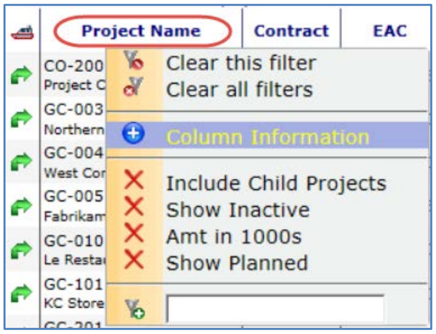
TIP

Expected Contract Value is reported for not-yet committed projects.

Label	***Description***
Project Name	Project ID and Description as entered in the Project Setup document
Start	The Project Start date
Finish	The Project Finish date
PM	The Project Manager on the project
Status	Status of Project Setup document
ID	The Project ID as entered in the Project Setup document
Last Forecast	Date of last forecast
Orig Contract	The original contract amount
CO Rev	Posted Change Order Revenue amount for the project
Contract*	Contract amount
U.CO*	Unapproved Change Order amount
EAC*	Estimate at Completion amount
Com + Act*	Committed + Actuals amount
Act	Actual expenses
Orig Commits*	Original Commitments amount
CCO*	Commitment Change Order amount
Curr Commits*	Current Commitments amount
Appr Pay Req*	Approved Pay Requests amount
% Spent*	Percent spent
FAC*	Forecast at Completion amount
BTD*	Billed to Date amount
O/U Billed*	Over/Under Billed amount
Forecast Rev Budget*	Revenue Budget amount
Earned Inc/ Value*	Earned Value amount
Est Profit*	Estimated Profit amount
Backlog*	Backlog amount
Net Cash Flow*	Net Cash Flow amount
Cash Conversion*	Cash Conversion amount
Cash Funding*	Cash Funding amount
Net Cash Demand*	Net Cash Demand amount
Last Act	Date of last action

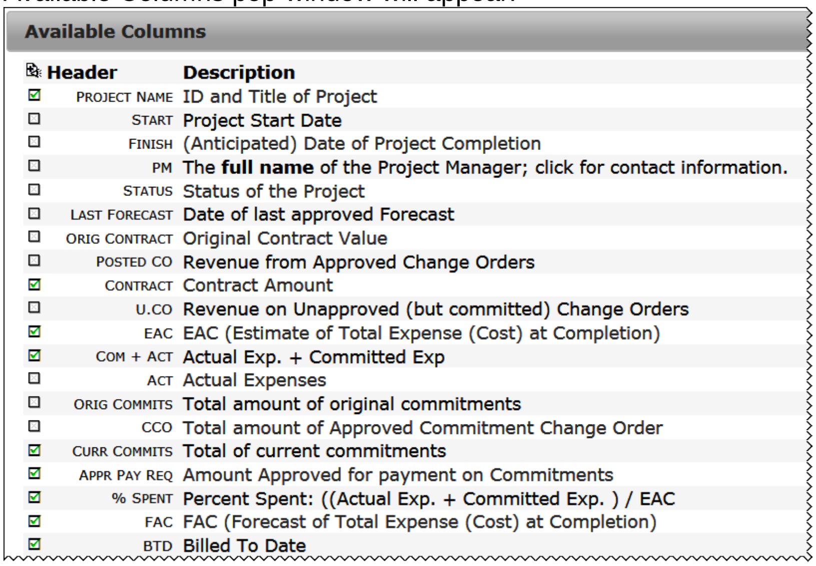
Show/Hide Columns On Demand

If you click on the Project Name header, a sort/filter options menu will appear. The Column Information option appears on this drop-down menu.



To show or hide columns:

1. Click the Column Information option on the drop-down menu. An Available Columns pop-window will appear:



Available Columns

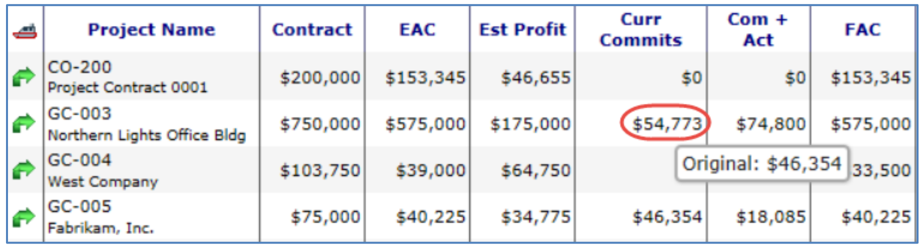
	Header	Description
☑	PROJECT NAME	ID and Title of Project
☐	START	Project Start Date
☐	FINISH	(Anticipated) Date of Project Completion
☐	PM	The **full name** of the Project Manager; click for contact information.
☐	STATUS	Status of the Project
☐	LAST FORECAST	Date of last approved Forecast
☐	ORIG CONTRACT	Original Contract Value
☐	POSTED CO	Revenue from Approved Change Orders
☑	CONTRACT	Contract Amount
☐	U.CO	Revenue on Unapproved (but committed) Change Orders
☑	EAC	EAC (Estimate of Total Expense (Cost) at Completion)
☑	COM + ACT	Actual Exp. + Committed Exp
☐	ACT	Actual Expenses
☐	ORIG COMMITS	Total amount of original commitments
☐	CCO	Total amount of Approved Commitment Change Order
☑	CURR COMMITS	Total of current commitments
☑	APPR PAY REQ	Amount Approved for payment on Commitments
☑	% SPENT	Percent Spent: ((Actual Exp. + Committed Exp.) / EAC
☑	FAC	FAC (Forecast of Total Expense (Cost) at Completion)
☑	BTD	Billed To Date

2. Use the checkboxes to show or hide columns.

3. Click  to close the dialog box and update the Executive Dashboard part.

Mouse-Overs

If you mouse over certain columns, additional information appears, for example:



	Project Name	Contract	EAC	Est Profit	Curr Commits	Com + Act	FAC
	CO-200 Project Contract 0001	$200,000	$153,345	$46,655	$0	$0	$153,345
	GC-003 Northern Lights Office Bldg	$750,000	$575,000	$175,000	$54,773	$74,800	$575,000
	GC-004 West Company	$103,750	$39,000	$64,750		Original: $46,354	33,500
	GC-005 Fabrikam, Inc.	$75,000	$40,225	$34,775	$46,354	$18,085	$40,225

Mouse over	*For*
Contract	Original contract amount
Com + Act	Actual amount
Curr Commits	Original commitment amount

Export to Microsoft Excel

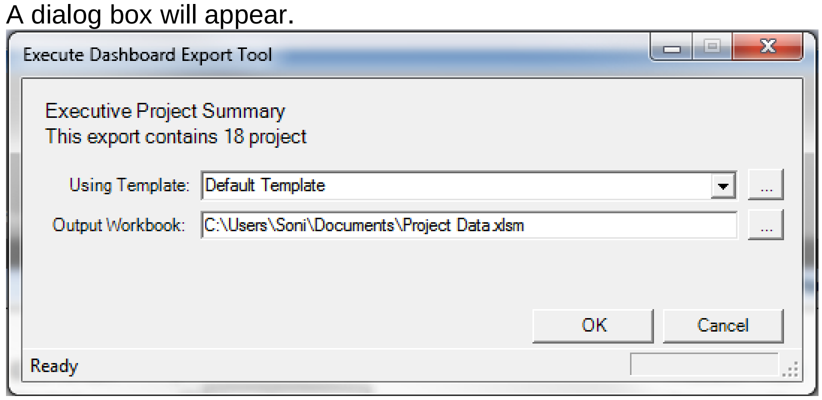
After filtering, you can choose to export the data that appears on the Executive Dashboard to a Microsoft Excel file.

To export Executive Dashboard data:

1. Click on the Executive Dashboard.

	Project Name	Contract	EAC	Est Profit
	CO-200 Project Contract 0001	$200,000	$153,345	$46,655
	GC-003 Northern Lights Office Bldg	$750,000	$575,000	$175,000
	GC-004 West Company	$103,750	$39,000	$64,750

A dialog box will appear.

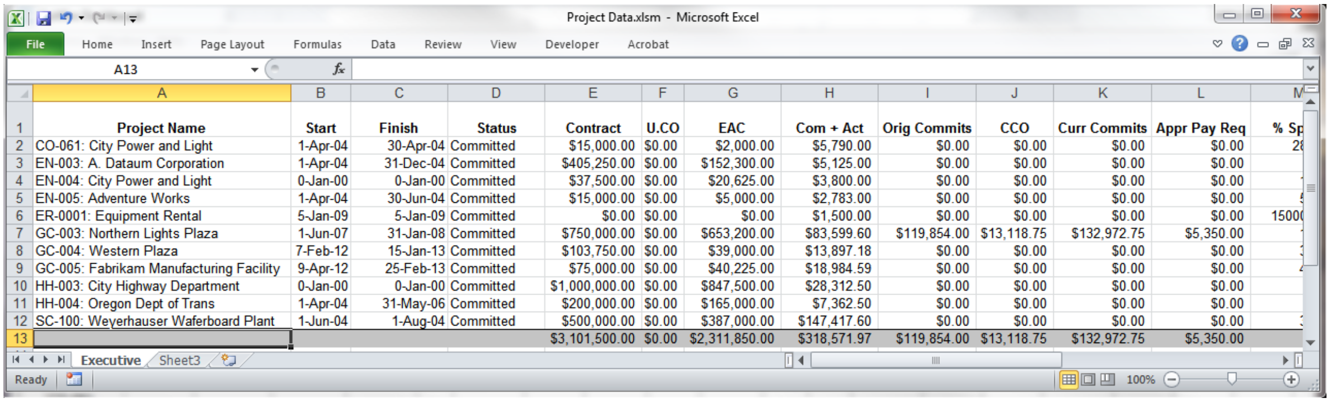


2. If you want to use the Executive Dashboard (EDB) template that appears on the **Using Template** field, leave the field alone. Otherwise, click to select another template from your drop-down choices or click to browse for an EDB Report template on your computer.

Note: the <u>EDB Report Tool</u> chapter, beginning on page 12, describes how you can create your own template file(s).

3. If you want the Microsoft Excel file that will be created to be located and named as indicated in the **Output Workbook** field, leave the field alone. Otherwise, change the filename or click ... to browse for a different location.

4. Click OK. The EDB Report workbook will open in Microsoft Excel, for example:



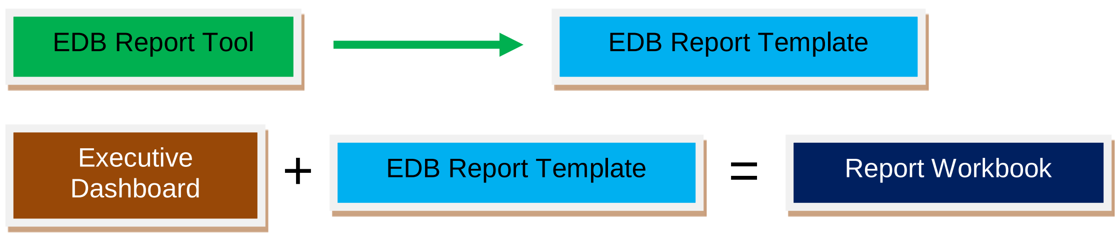
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Project Name	Start	Finish	Status	Contract	U.CO	EAC	Com + Act	Orig Commits	CCO	Curr Commits	Appr Pay Req	% Sp
2	CO-061: City Power and Light	1-Apr-04	30-Apr-04	Committed	$15,000.00	$0.00	$2,000.00	$5,790.00	$0.00	$0.00	$0.00	$0.00	28
3	EN-003: A. Dataum Corporation	1-Apr-04	31-Dec-04	Committed	$405,250.00	$0.00	$152,300.00	$5,125.00	$0.00	$0.00	$0.00	$0.00	
4	EN-004: City Power and Light	0-Jan-00	0-Jan-00	Committed	$37,500.00	$0.00	$20,625.00	$3,800.00	$0.00	$0.00	$0.00	$0.00	
5	EN-005: Adventure Works	1-Apr-04	30-Jun-04	Committed	$15,000.00	$0.00	$5,000.00	$2,783.00	$0.00	$0.00	$0.00	$0.00	
6	ER-0001: Equipment Rental	5-Jan-09	5-Jan-09	Committed	$0.00	$0.00	$0.00	$1,500.00	$0.00	$0.00	$0.00	$0.00	15000
7	GC-003: Northern Lights Plaza	1-Jun-07	31-Jan-08	Committed	$750,000.00	$0.00	$653,200.00	$83,599.60	$119,854.00	$13,118.75	$132,972.75	$5,350.00	
8	GC-004: Western Plaza	7-Feb-12	15-Jan-13	Committed	$103,750.00	$0.00	$39,000.00	$13,897.18	$0.00	$0.00	$0.00	$0.00	
9	GC-005: Fabrikam Manufacturing Facility	9-Apr-12	25-Feb-13	Committed	$75,000.00	$0.00	$40,225.00	$18,984.59	$0.00	$0.00	$0.00	$0.00	
10	HH-003: City Highway Department	0-Jan-00	0-Jan-00	Committed	$1,000,000.00	$0.00	$847,500.00	$28,312.50	$0.00	$0.00	$0.00	$0.00	
11	HH-004: Oregon Dept of Trans	1-Apr-04	31-May-06	Committed	$200,000.00	$0.00	$165,000.00	$7,362.50	$0.00	$0.00	$0.00	$0.00	
12	SC-100: Weyerhauser Waferboard Plant	1-Jun-04	1-Aug-04	Committed	$500,000.00	$0.00	$387,000.00	$147,417.60	$0.00	$0.00	$0.00	$0.00	
13					$3,101,500.00	$0.00	$2,311,850.00	$318,571.97	$119,854.00	$13,118.75	$132,972.75	$5,350.00	

5. Save, print or edit the file as desired. The file is a stand-alone file, subject to Microsoft Excel functionality. Changes you make to this file are not reflected back in Spitfire. (See also the <u>EDB Report Output</u> chapter on page 42.)

The EDB Report Tool

The Executive Dashboard (EDB) Report Tool is a Microsoft Excel supplemental workbook that you can use to create an EDB Report template workbook. The template can then be used to export data from the Executive Dashboard and create an EDB Report workbook.

The EDB Report template workbook can include a basic report worksheet, an advanced report worksheet, and up to four other report worksheets. All these worksheets are formatted and defined through the EDB Report Tool. The worksheets populate with data when the EDB Report template is used by the Executive Dashboard's export option.



Spitfire distributes both a blank (**EDB WR blank.xltm**) and a sample (**EDB WR Sample.xltm**) template file. You will need the blank template file in order to create your own EDB Report template workbook. These files can be found in Install Base Folder/Implementation Resources/EDBSupplements in ICTool (View tab).

Note: A blank template file with graph setup is also available. See Appendix A on page 44.

Planning

Whether you want to create a report worksheet based on an idea of how you want data to be displayed or you want to mimic a report that you are accustomed to using, you need to plan what each report will look like. Using either a piece of paper or software, determine the following for each report that you want. Minimally, you should plan your Basic Report.

- Will the report include a logo? Where will it be positioned?
- What will the report name be? How will it be formatted? Where exactly will it be located?
- Will you be using conditional formatting to strengthen the appearance of your report?
- What columns of data will be included in the report? What will each column be titled? In order to better understand and find possible columns of data, you can look at the raw data, as described in the following instructions.
- Will you need formulas for any columns?
- Will the report need column totals?

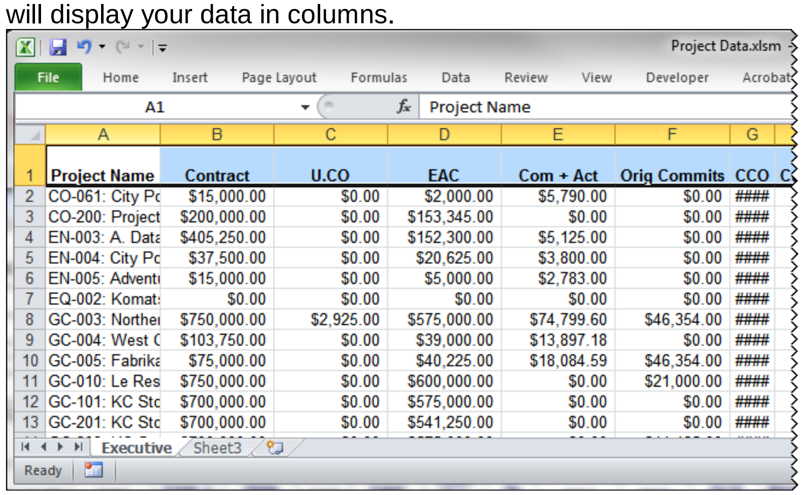
Raw Data

To use raw data in your planning:

1. Log in to sfPMS and to go the Executive Dashboard.
2. Assuming you have data in your Executive Dashboard, click :

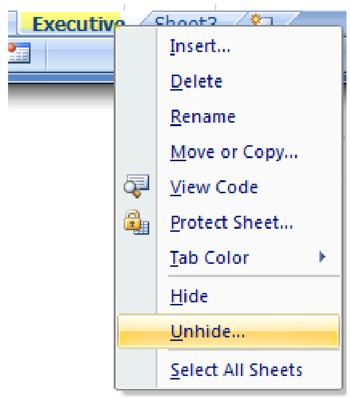
3. Click 

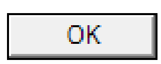
on the Executive Dashboard Export Tool to create an EDB report using the **Default Template**. The report will display your data in columns.



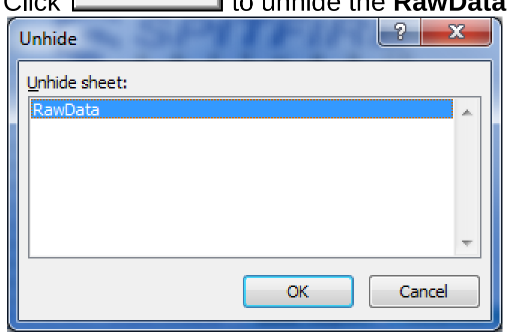
	A	B	C	D	E	F	G
1	Project Name	Contract	U.CO	EAC	Com + Act	Orig Commits	CCO
2	CO-061: City Pc	$15,000.00	$0.00	$2,000.00	$5,790.00	$0.00	####
3	CO-200: Project	$200,000.00	$0.00	$153,345.00	$0.00	$0.00	####
4	EN-003: A. Data	$405,250.00	$0.00	$152,300.00	$5,125.00	$0.00	####
5	EN-004: City Pc	$37,500.00	$0.00	$20,625.00	$3,800.00	$0.00	####
6	EN-005: Advent	$15,000.00	$0.00	$5,000.00	$2,783.00	$0.00	####
7	EQ-002: Komat	$0.00	$0.00	$0.00	$0.00	$0.00	####
8	GC-003: Northe	$750,000.00	$2,925.00	$575,000.00	$74,799.60	$46,354.00	####
9	GC-004: West (	$103,750.00	$0.00	$39,000.00	$13,897.18	$0.00	####
10	GC-005: Fabrika	$75,000.00	$0.00	$40,225.00	$18,084.59	$46,354.00	####
11	GC-010: Le Res	$750,000.00	$0.00	$600,000.00	$0.00	$21,000.00	####
12	GC-101: KC Stc	$700,000.00	$0.00	$575,000.00	$0.00	$0.00	####
13	GC-201: KC Stc	$700,000.00	$0.00	$541,250.00	$0.00	$0.00	####

4. Right-click on the Executive tab on the bottom then select **Unhide**:

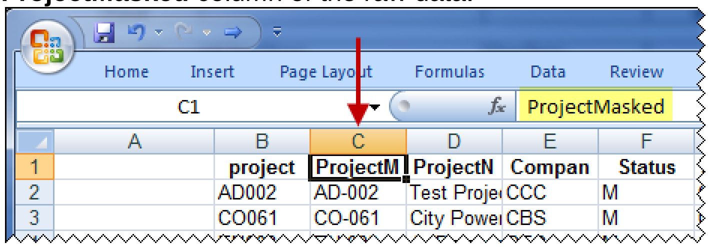


5. Click 

to unhide the **RawData** worksheet:



6. Use the RawData worksheet to identify the columns of data that you will want in your new reports and to learn column names. For example, if you know you want a column with Project IDs in your report, you can learn that such information is in the **ProjectMasked** column of the raw data.



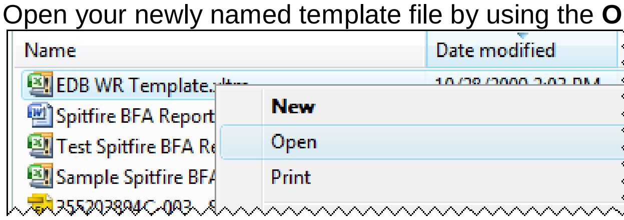
Once your reports are planned, you are ready to create your EDB Report template workbook.

Your Template Workbook

To create your copy of the EDB Report template workbook:

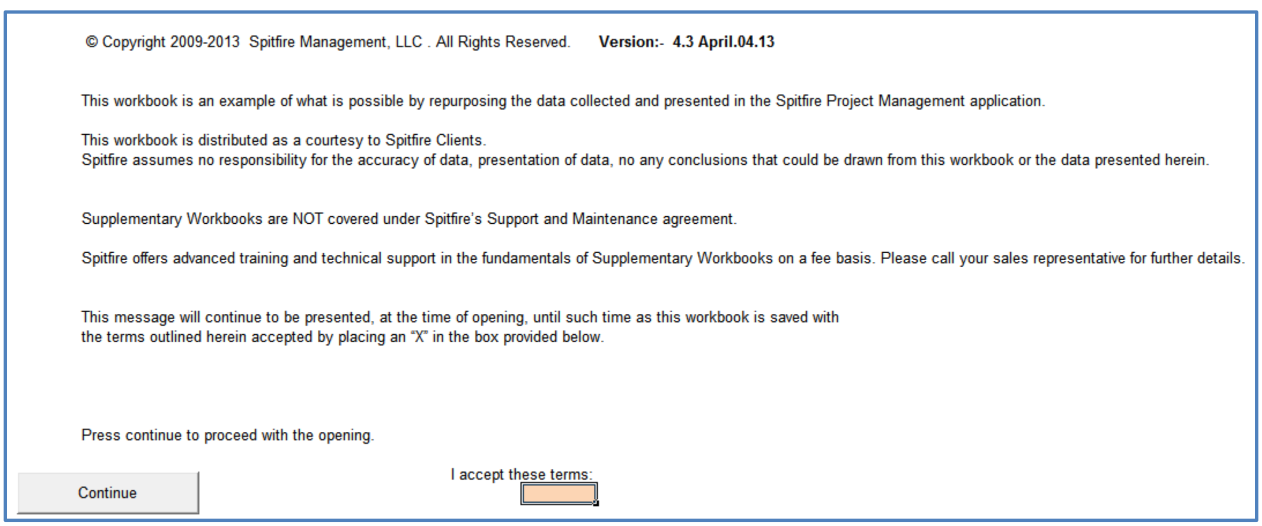
1. Copy the distributed **EDB WR blank.xltm** file and give your working template file a new name, for example, “EDB WR template.xltm”. (Make sure you retain the **.xltm** extension.)

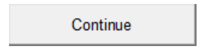
2. Open your newly named template file by using the **Open** option.



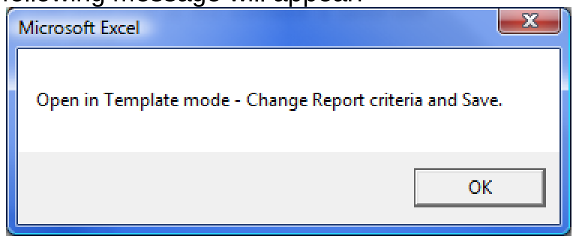
Note: **do not double-click** on the file in order to open it.

The workbook will open on the Spitfire Agreement worksheet:



3. Read the agreement then click the 

button. The following message will appear:

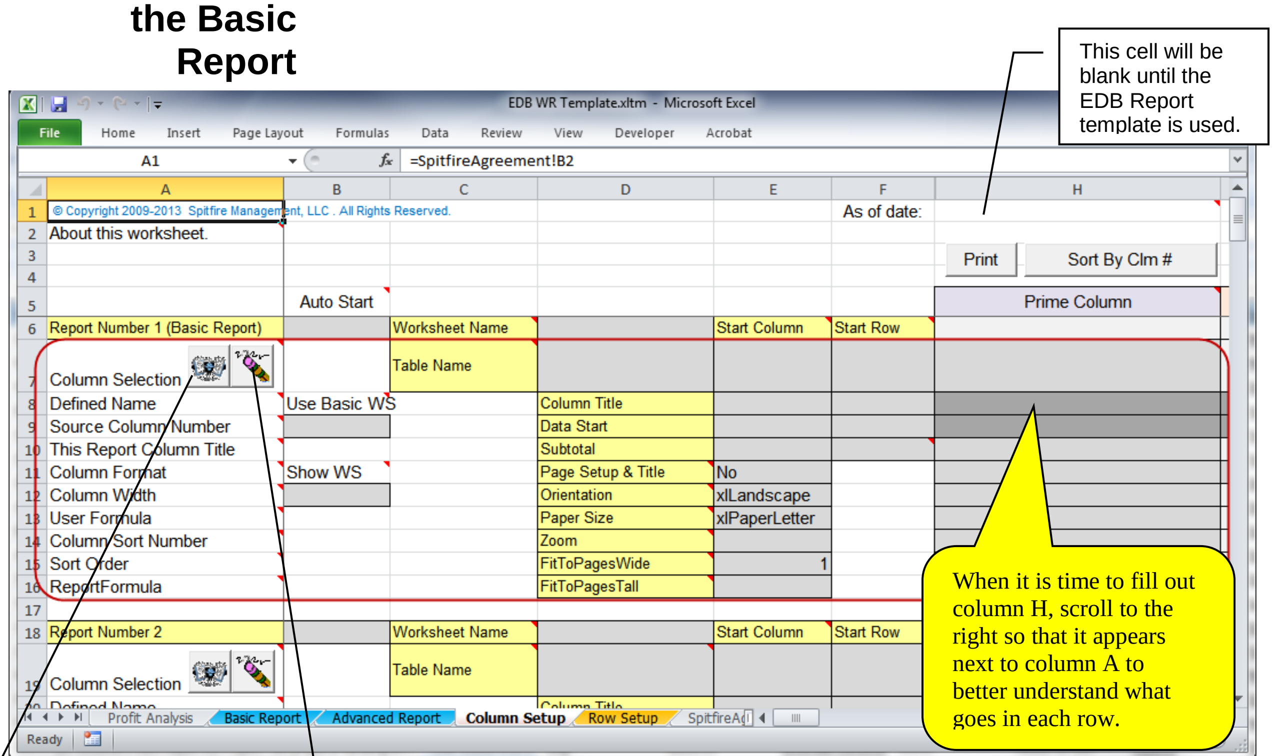


Note: if the message does not appear, either you did not open the template file correctly (perhaps you double-clicked on the filename) or you need to review the Microsoft Excel macro security.

4. Click 

. The workbook will open at the Column Setup worksheet (shown on the next page).

Column Setup Worksheet and the Basic Report



The Column Setup worksheet allows you to identify each report worksheet (including the basic and advanced report worksheets), and establish the report structure and columns that appear in these worksheets. The Column Setup worksheet is set up to configure up to five separate report worksheets, including the Basic Report. Each worksheet is treated separately and can have different column selections.

The section for Report Number 1 (Basic Report) is different from the other sections in the following respects:

- The columns selected can be used in conjunction with details on the Row Setup worksheet to create the Advanced Report worksheet.
- If you select **Yes** in the Use Basic WS cell (B9), data will be pushed into the format of the Basic Report worksheet.
- If you select **No** in the Show WS cell (B13), the Column Setup worksheet will not be visible when the template is opened from the Executive Dashboard.

Columns B through F on the Column Setup worksheet are used to define the global structure of each report worksheet.

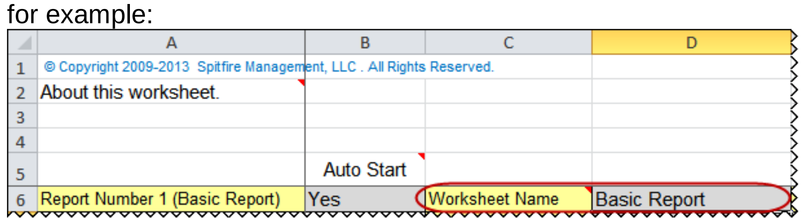
Columns H through AU are used to define data in each of the columns of the report worksheets.

The EDB Report Tool allows you to define up to five report worksheets, one of which is the Basic Report. Before defining other custom reports, you should define the Basic Report.

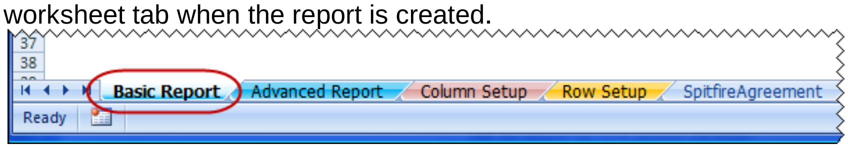
Define the Global Structure

1. In B6, select **Yes** to have this report **Auto Start** when the EDB Report workbook is created. Auto Start means that output will be automatically generated by inputting data into the Basic Report template.
   Note: while you should choose to auto start the Basic Report, you can choose to not generate other reports automatically. Users will then be able to generate other reports using the Create Reports button only when appropriate (see page 42).

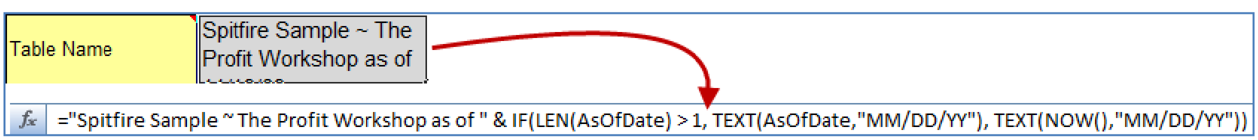
2. In D6, enter a **Worksheet Name** for the basic report worksheet, for example:



   No special characters are allowed. The name you enter corresponds to the Basic Report worksheet, which is already included in the workbook and says "Basic Report" by default. If you enter a different name in D6 (and "Use Basic" is set to **Yes** as described on step 14), that name will be used on the worksheet tab when the report is created.



3. In D7, enter the **Table Name** for this report, for example:



   Note: the cell can include text and formulas as shown above.

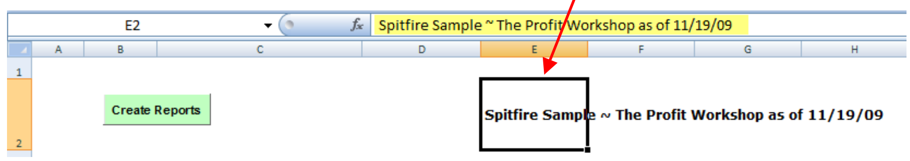
   When the EDB Report workbook is created, this name will be placed on the report in the position indicated in the next steps.

TIP

You can format the Table Name cell on the Basic Report any way you'd like. You can also use other Microsoft Excel functions, such as "center across selection" alignment to have the Table Name appear just where you want it.

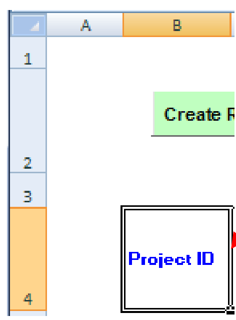
4. In E7, enter the **Start Column** identifying, by number, the column where **Table Name** data will be placed, and in F7, enter the **Start Row** identifying by number the row where **Table Name** data will be placed, for example:

Worksheet Name	Basic Report	Start Column	Start Row
Table Name	Spitfire Sample ~ The Profit Workshop as of	5	2



5. In E8, enter the **Start Column** and in **F8**, enter the **Start Row** identifying the position of the first **Column Title** for your data, for example:

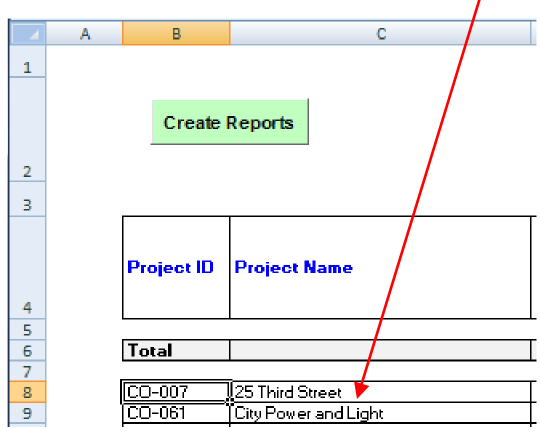
Basic Report	Start Column	Start Row
Spitfire Sample ~ The Profit Workshop as of	3	2
Column Title	2	4



Note: the Column Titles are specified in row 10; see "[Define the Prime Column]" on page 20.

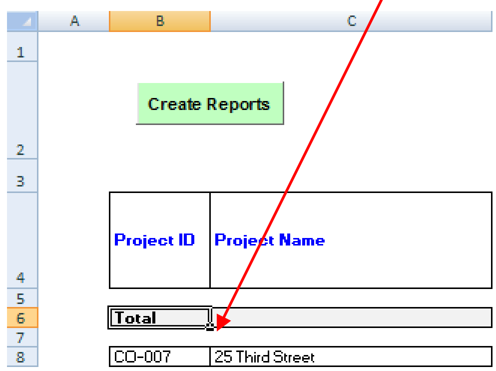
6. In E9, enter the **Start Column,** and in F9, enter the **Start Row** identifying the position where the **Data** will start to be placed, for example:

Basic Report	Start Column	Start Row
Spitfire Sample ~ The Profit Workshop as of	3	2
Column Title	2	4
Data Start	2	8



7. In E10, enter the **Start Column**, and in F10, enter the **Start Row** identifying the position where the first **Subtotal** will be placed, for example:

Basic Report	Start Column	Start Row
Spitfire Sample ~ The Profit Workshop as of	5	2
Column Title	2	4
Data Start	2	8
Subtotal	2	6



Note: if you enter a negative number (e.g., -2), then the Subtotal row will be placed below the last row of data separated by the specified number of blank rows (e.g., 2 blank rows).

8. In E11, indicate if you want to set up page orientation, size and print formatting on the Column Setup worksheet by selecting **Yes** or **No**.

Page Setup & Title	No
	Yes
	No

Note: if you select **No**, input in E12, E13, E14, E15 and E16 will be ignored. The Basic Report uses page print defaults that have been set up to print correctly. You can also use Microsoft Excel options for page setup and printing directly from an existing worksheet.

9. (*If E11 is Yes*) In E12, select the **Orientation** of the paper, either **Landscape** or **Portrait**.

Orientation	xlLandscape

10. (*If E11 is Yes*) In E13, select the **Paper Size** of the paper, either **Letter** or **Legal**.

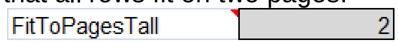
Paper Size	xlPaperLetter

11. (*If E11 is Yes; optional*) In E14, enter a **Zoom** reduction or enlargement percentage if you want to better fit the data on one printed page. Leave this cell blank if you want to use the Fit to Page Wide or Tall options (below).

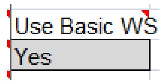
Zoom	75

12. (*If E11 is Yes; optional*) In E15, enter how many pages you want all columns of the report to fit on when printed. For example, if your report has 10 columns and columns 9 and 10 normally print on a second page, you can indicate that you want the output reduced so that all columns fit on one page:

FitToPagesWide	1

13. (*If E11 is Yes; optional*) In E16, enter how many pages you want all rows of the report to fit on when printed. For example, if your report has 52 rows and rows 51 and 52 normally appear on a third page, you can indicate that you want the output reduced so that all rows fit on two pages:


Note: if you leave this field blank, Microsoft Excel will automatically create the number of rows per page based on the page margin.

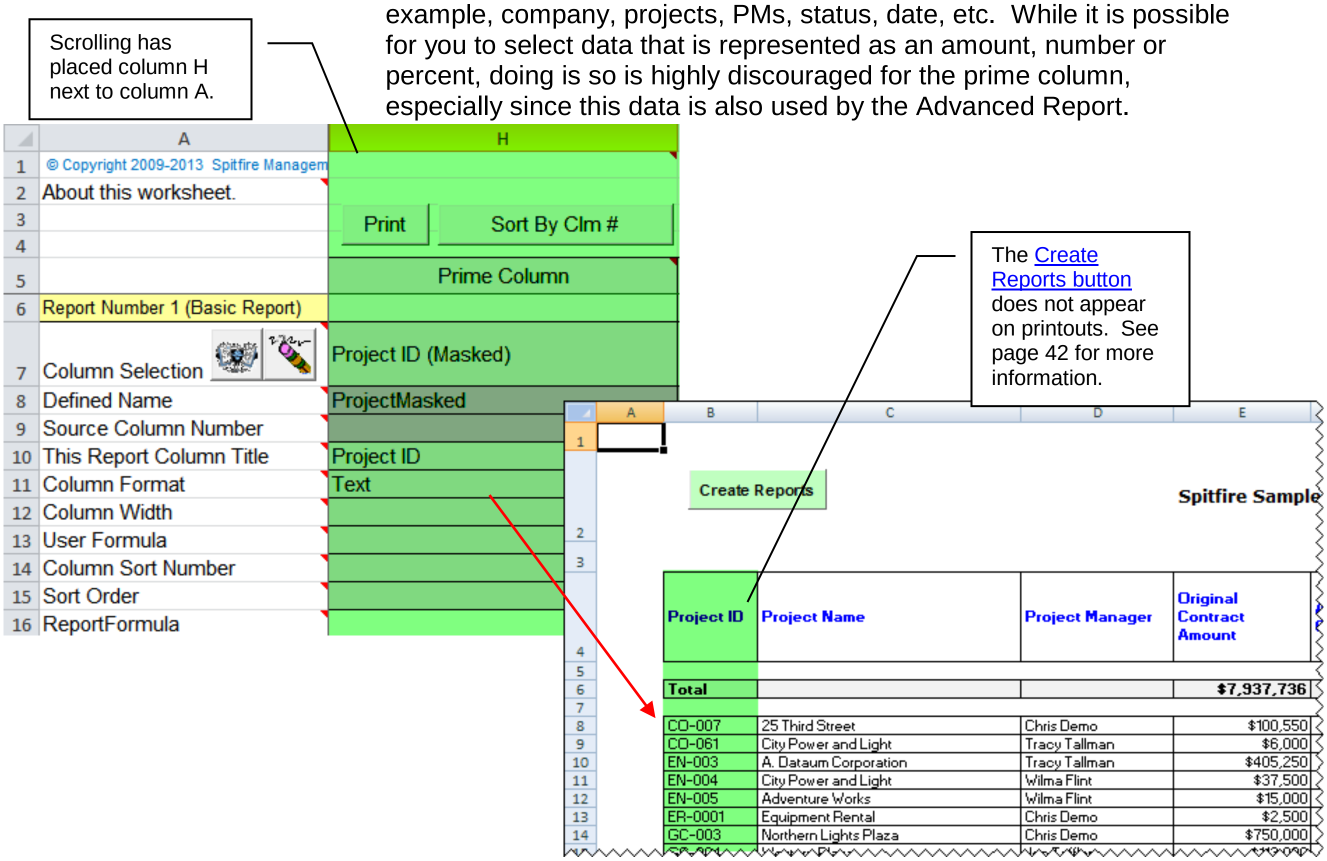
14. In B9, indicate whether the data will **Use Basic WS**. **Yes** is the default and means that the format on the Basic Report worksheet will be used; otherwise, no format is defined.


Note: this option is available for Report 1 (Basic) only.

15. In B12 (**Show WS**), indicate whether you want this Column Setup worksheet to appear in the EDB Report workbook (that is created when you export data). If you do not want general users to have access to this worksheet, keep the default of **No**.
Note: this option, which seems to apply to Report 1 only, actually applies whether the Basic Report is completed or not.

Define the Prime Column

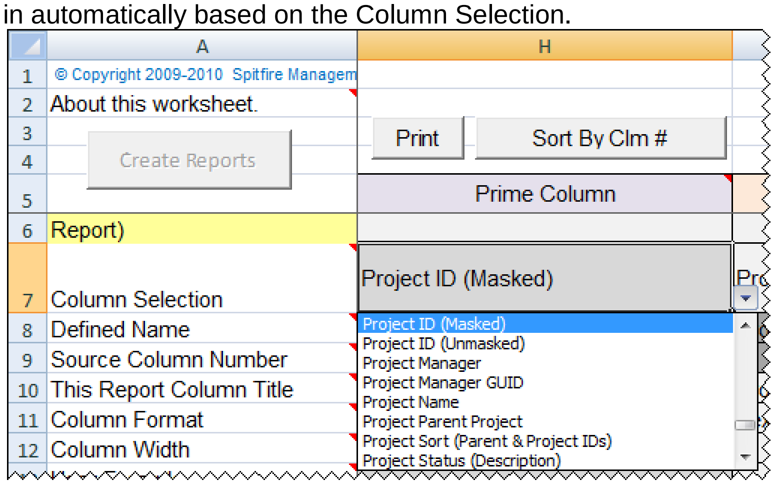
The Prime Column is the first column that shows up in your report worksheet. It must not be blank nor can it be defined as @formula. The data contained in this column should be the main focus of the report, for example, company, projects, PMs, status, date, etc. While it is possible for you to select data that is represented as an amount, number or percent, doing is so is highly discouraged for the prime column, especially since this data is also used by the Advanced Report.



TIP

If you create custom fields on the Executive Dashboard, you may need to take extra steps to have those fields appear on this drop-down list. See [KBA-01545](KBA-01545).

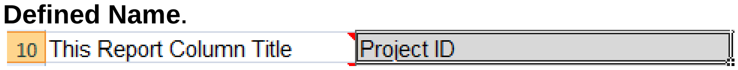
1. If helpful to do so, scroll the worksheet so that column H appears next to column A.
2. In H7 (for **Column Selection**), select the Executive Dashboard-defined name for the desired data in this column. The **Defined Name** and **Source Column Number** (rows 8 and 9) will be filled in automatically based on the Column Selection.



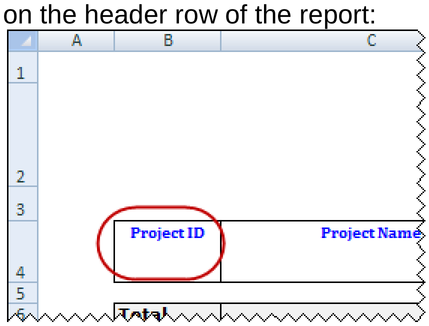
Note: except for the Prime Column, the first choice in the drop-down is **@Formula**—this identifies the column as a special column used to present data that is the result of a user-defined formula. If you select @Formula in other columns, you will need to enter the formula in row 13.

- The Column Selection drop-down choices can be organized alphabetically or in the column order they appear on the RawData worksheet (see also page 13). If the choices are not in the order you prefer, click Sort A to Z or Sort By Clm # to change the sort.
- If having a printout of all possible Column Selection choices would be helpful, click Print then.

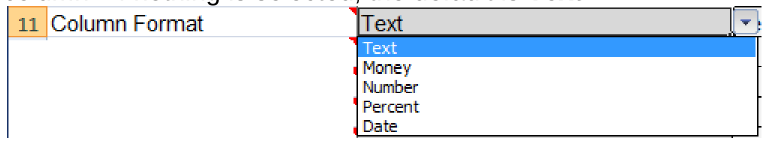
3. In H10, enter **This Report Column Title**—a title appropriate for the column. If no title is entered, the title will default to the **Defined Name**.



When the EDB Report workbook is created, this title will appear on the header row of the report:

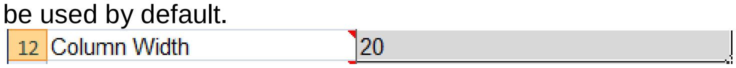


4. In H11, select a **Column Format** to format the data in this column. If nothing is selected, the default is **Text**.

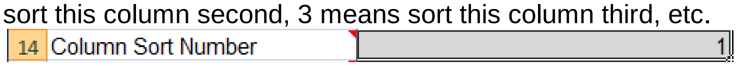


TIP
If choosing a column on which to sort, make sure that there will be more than one value to sort. For example, if sorting by project then project manager, but there is only one project manager per project, it makes no sense to indicate a sort for project manager.

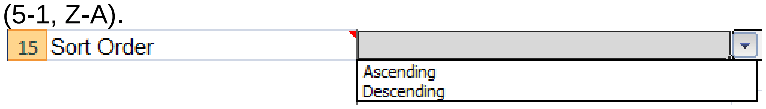
5. In H12, enter the **Column Width**. If no width is entered, **15** will be used by default.



6. Leave H13 (**User Formula**) blank for the prime column.
7. (*optional*) In H14, enter a **Column Sort Number** if you want this column to be sorted. **1** means sort this column first, 2 means sort this column second, 3 means sort this column third, etc.



8. (*If H14 has a number*) In H15, select the direction of the sort for the column, either ascending (1-5, A-Z) or descending (5-1, Z-A).

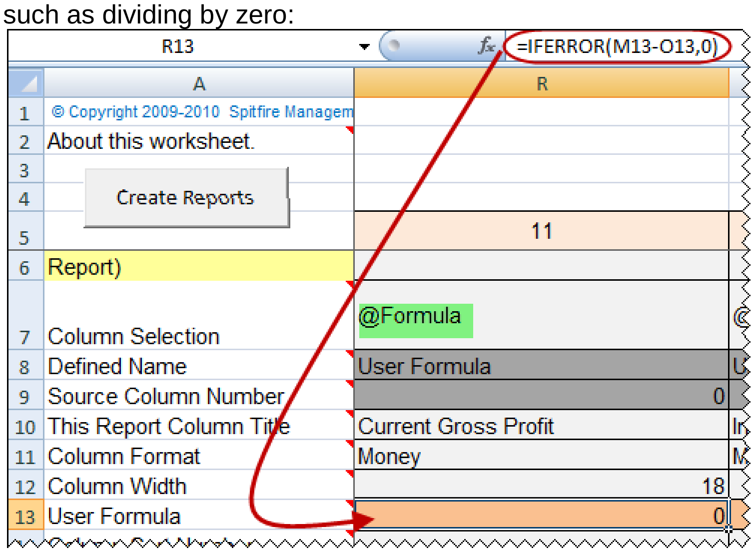


Define the Other Columns

Using the instruction above, fill out columns I through AU, rows 7-15 as needed. Keep in mind the following information about formulas.

Formula Entry

- When the Column Selection is **@Formula,** you can enter the formula in the User Formula row. You can use any standard Microsoft Excel formula to calculate the data that will appear in the column. The formula can reference other columns in the report worksheet. We recommend that you use the **ISERROR(*your_formula*,*Default*)** function to ensure that your report doesn't display errors based on incorrect or missing data, such as dividing by zero:

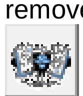


- You can also use the point and click method in Microsoft Excel to create your formula.
- If you leave the “User Formula” and “This Report Column Title” cells blank, you will end up with a blank column in your report, which is valid.

An example of several defined columns appears below:

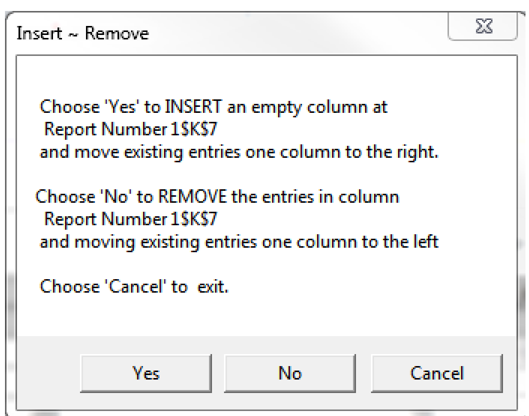
	A	H	I	J	K
1	© Copyright 2009-2013 Spitfire Managem				
2	About this worksheet.				
3		Print Sort By Clm #			
4					
5		Prime Column	2	3	4
6	Report Number 1 (Basic Report)				
7	Column Selection	Project ID (Masked)	Expense Original EAC amount	Expense Current EAC amount	@Formula
8	Defined Name	ProjectMasked	ex_bud_amt	ex_eac_amt	User Formula
9	Source Column Number				0
10	This Report Column Title	Project ID	Original EAC	Current EAC	Original Gross Profit
11	Column Format	Text	Money	Money	Money
12	Column Width	20	18		
13	User Formula				0
14	Column Sort Number	1			
15	Sort Order				
16	ReportFormula				

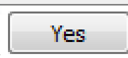
Insert/Remove Column

At any point after defining your columns, you can insert a new column between existing columns (and move current columns to the right) or remove a column (and move columns to the left) by clicking the  button.

To insert a new column:

1. Click the Column Selection cell in the column where you want to insert a new column. For example, if you wanted a new column between Expense Current EAC Amount and @Formula (shown above), you would click on the Column Selection cell (7) in column K.
2. Click . The following dialog box will appear:



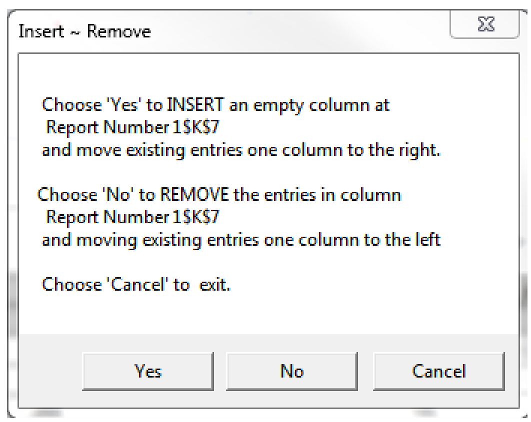
3. Click 

. Your worksheet will include a new empty column where you can enter information about another template column, for example:

	A	I	J	K	L
1	© Copyright 2009-2013 Spitfire Managem				
2	About this worksheet.				
3					
4					
5		2	3	4	5
6	Report Number 1 (Basic Report)				
7	Column Selection	Expense Original EAC amount	Expense Current EAC amount		@Formula
8	Defined Name	ex_bud_amt	ex_eac_amt		User Formula
9	Source Column Number				0
10	This Report Column Title	Original EAC	Current EAC		Original Gross Profit
11	Column Format	Money	Money		Money
12	Column Width	18	18		
13	User Formula				
14	Column Sort Number				
15	Sort Order				

To remove a column:

1. Click the Column Selection cell in the column that you want to remove. For example, if you wanted to remove the Expense Original EAC amount column in the example on page 23, you would click on the Column Selection cell (7) in column I.
2. Click . The following dialog box will appear:



3. Click No. Your worksheet will remove that column and move other columns to the left, for example:

	A	H	I	J
1	© Copyright 2009-2013 Spitfire Managem			
2	About this worksheet.			
3		Print / Sort By Clm #		
4				
5		Prime Column	2	3
6	Report Number 1 (Basic Report)			
7	Column Selection	Project ID (Masked)	Expense Current EAC amount	@Formula
8	Defined Name	ProjectMasked	ex_eac_amt	User Formula
9	Source Column Number			0
10	This Report Column Title	Project ID	Current EAC	Original Gross Profit
11	Column Format	Text	Money	Money
12	Column Width	20	18	
13	User Formula			
14	Column Sort Number	1		
15	Sort Order			

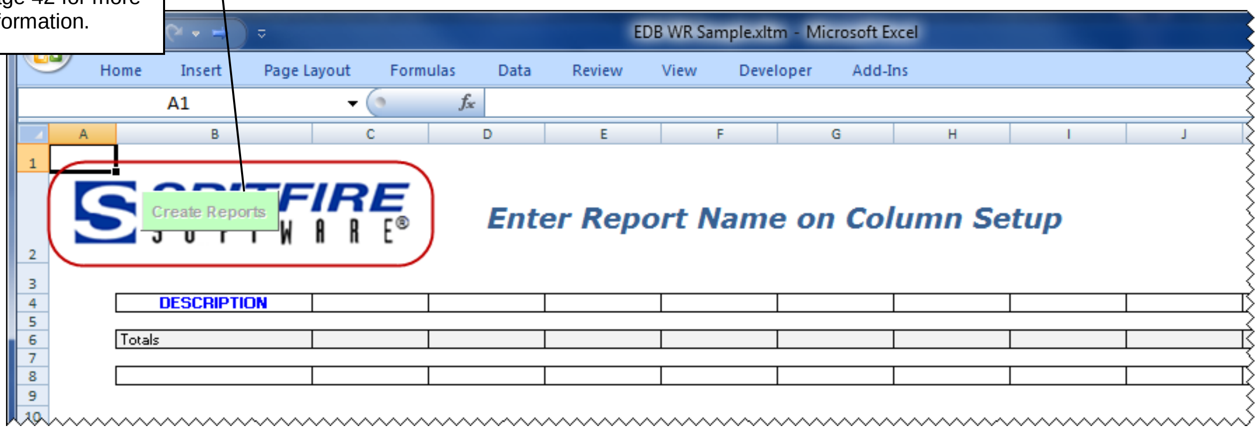
Add Header Info

You can add logos, graphics, results fields, or text directly in the Basic Report (or any existing worksheet designated for report output). What you add to the worksheet remains in the report template and is visible in the EDB Report workbook.

The Create Reports button will not appear in printouts. See page 42 for more information.

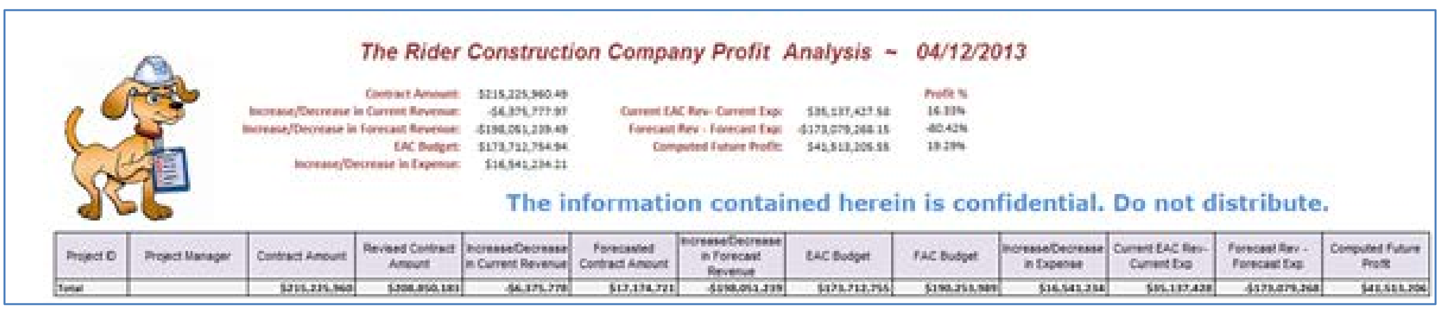
Example: Logo

You can add your logo in the upper left corner of the worksheet; it will appear there in your output/printout.



Example: Summary Info

You can add text and formulas (that reference other cells) at the top of the worksheet if you want certain information right at top.



Review the Basic Report

The only way to find out if your data appears the way you intend it to appear is to use your template.

To use your template:

1. Save your work and close the workbook. Provided you opened the workbook as a template, it will save as a template (**.xltm**) file.
2. Log in to sfPMS.
3. Go to the Executive Dashboard.

4. Use the filters on the Executive Dashboard (see page 5) to display the data that you will want on your report worksheet.

5. Click to export your data.

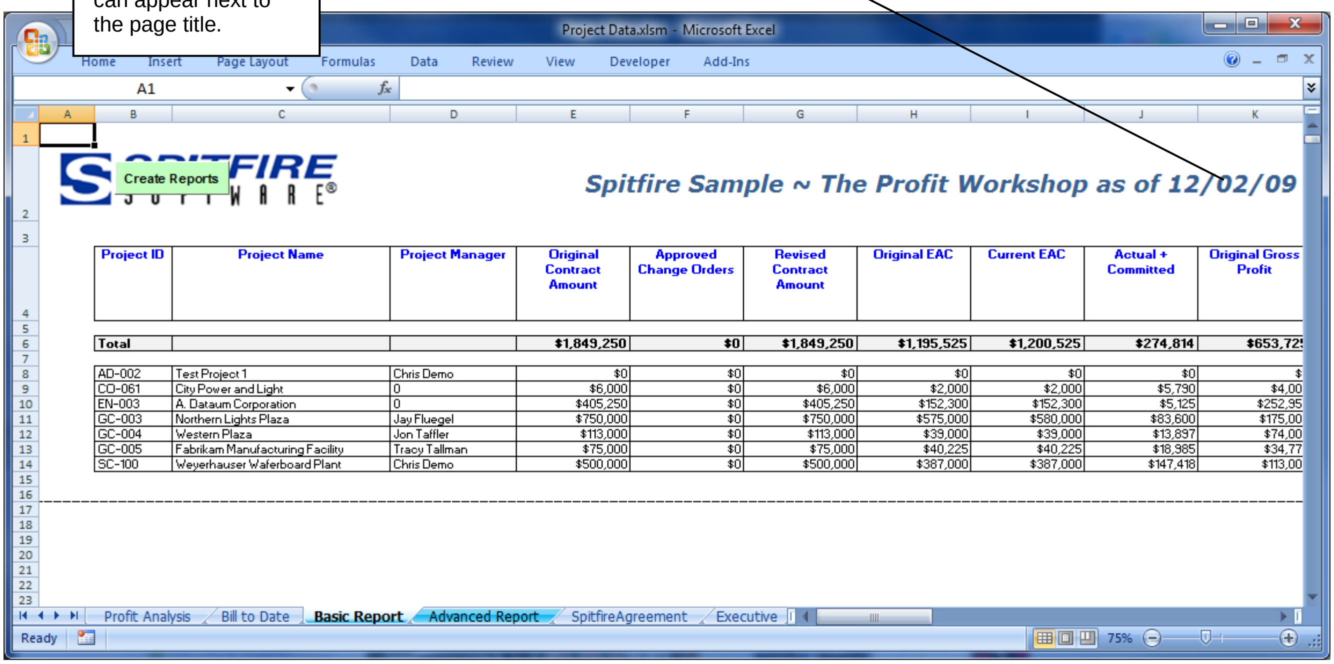
6. On the dialog box that appears, click at the **Using Template** field to find your newly created EDB Report template on your computer.

7. If the Spitfire Agreement appears when your report workbook first opens, click the **Continue** button. The Basic Report worksheet will then appear.

8. Look over the report worksheet carefully, checking for correct data in each column and ensuring that it is formatted as you designed. If you find mistakes, jot them down. You will make changes back in the template file, not in this report file.

9. Close the report workbook without saving it.

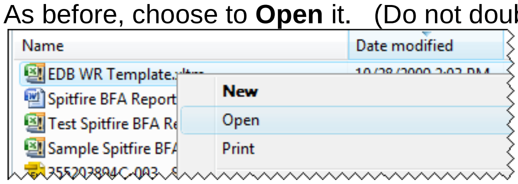
The date you create the report worksheet can appear next to the page title.



Edit the Basic Report

1. Locate your EDB Template workbook on your computer. It should have an **.xltm** extension.

2. As before, choose to **Open** it. (Do not double-click to open it.)

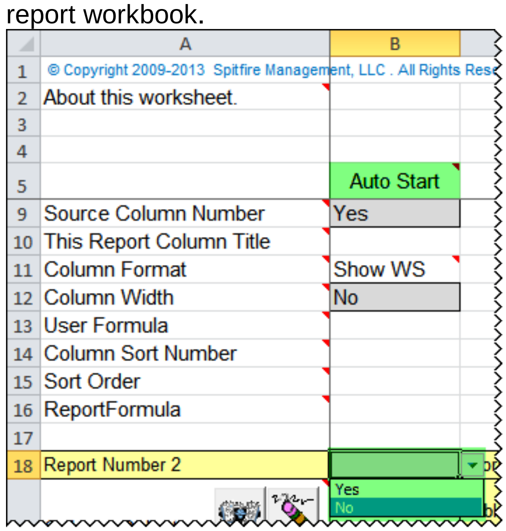


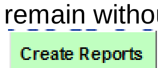
3. Make your changes on the Column Setup worksheet.
4. Save your template workbook. When the template file is ready, you should upload the template into Spitfire so that all your users can select it (see page 39).

Reports 2-5

If you want to define other reports (except for the Advanced Report which is described on page 29), follow the instructions for the Basic Report but keep the following in mind:

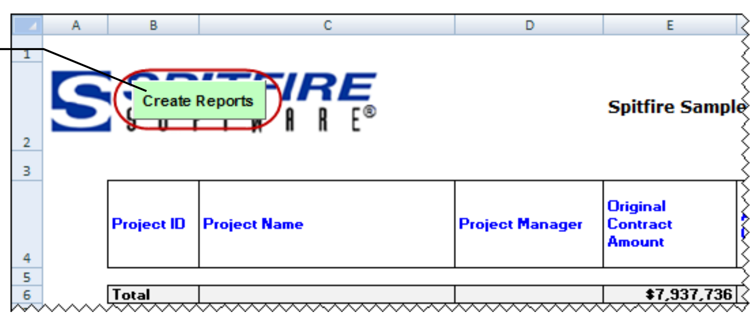
- In column B (**Auto Start**) for each report, you can indicate **Yes** if you want that report to be populated as soon as you create your report workbook.



Note: If you indicate **No** (or leave the cell blank), the report will remain without data until you or another user clicks the 

button in the upper-left corner of the Basic Report worksheet. (See also page 42.)

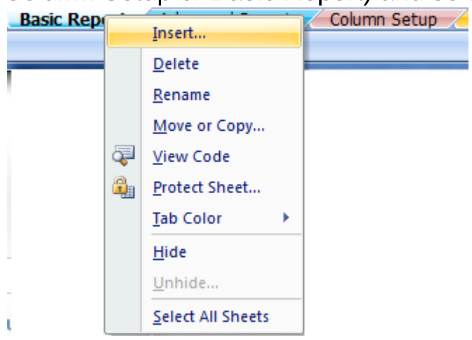
This button does not exist on the created Basic Report if all reports auto-start.

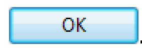


- Unless you want the Report Tool to create worksheets for your additional reports at the time the reports are generated, you should create the worksheets yourself.
  - o Click on  (which appears after your last worksheet tab)

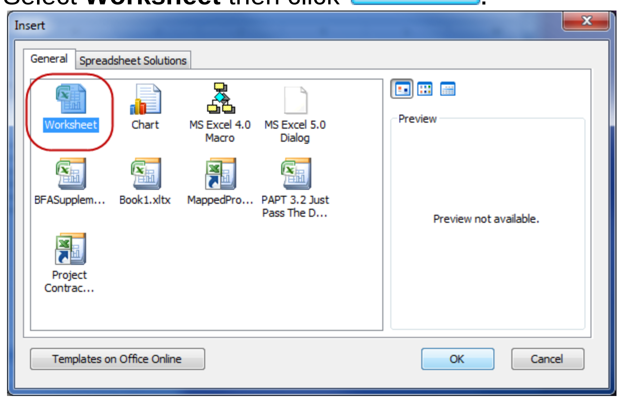
    -or-

Right-click on an existing worksheet tab (such as Column Setup or Basic Report) and select **Insert**.

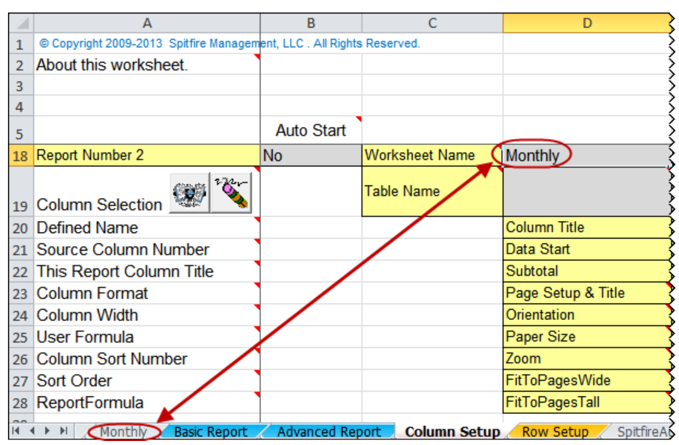


Select **Worksheet** then click 

.



- o Double click on the tab that says **Sheet1** and rename the tab (and the worksheet). This name should match the Worksheet Name you indicate on the Column Setup worksheet.



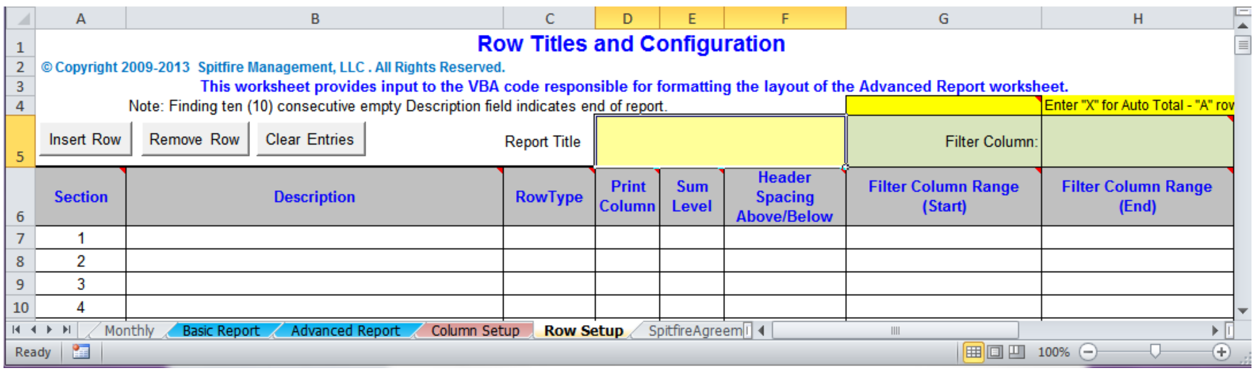
- o Add static text, logos and formatting to the new worksheet to make your report look exactly as you want.

- You should review and correct all your reports as needed.

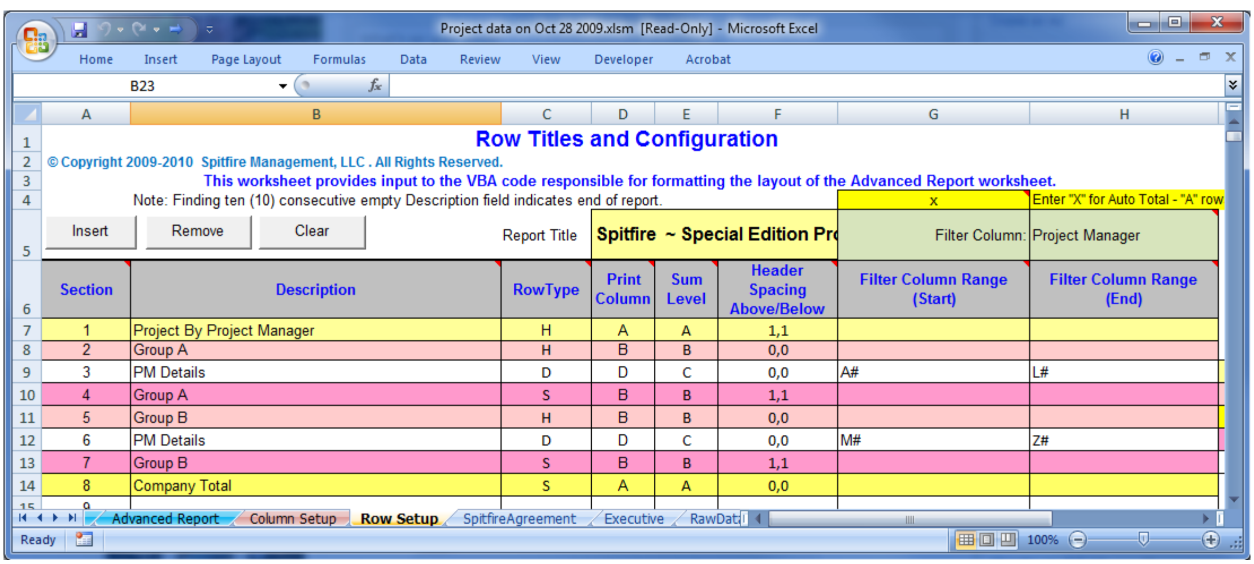
Row Setup Worksheet and the Advanced Report

The Row Setup worksheet is used to define the Advanced Report. The Advanced Report can be configured for multiple tier subtotaling and rollup, and filtering for specific rows matching user-defined filter columns and criteria. The Advanced Report is optional.   If you do not need to define the Advanced Report, skip to the chapter on the [Template tool](#) on page 39.

Blank



Sample



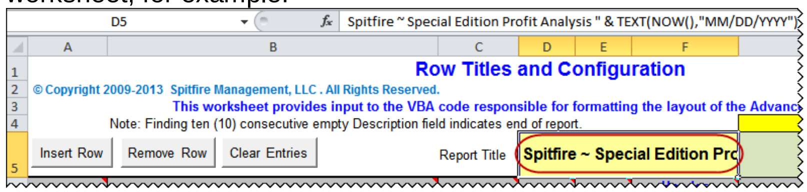
The Row Setup worksheet allows you to structure the Advanced Report worksheet from a row layout point of view. You can define multiple header and subtotal rows on the Advanced Report worksheet and indicate how rows should be grouped and filtered.

When you export data from the Executive Dashboard, the Advanced Report worksheet organizes the rows of data according to your specifications.

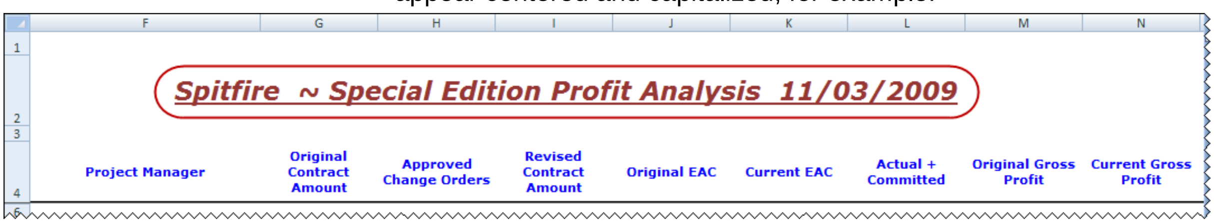
Note: The row setup in the Advanced Report is linked to the column setup in the Basic Report. For this reason, column setup in the Basic Report must be completed before the Advanced Report is configured.

Define the Global Structure

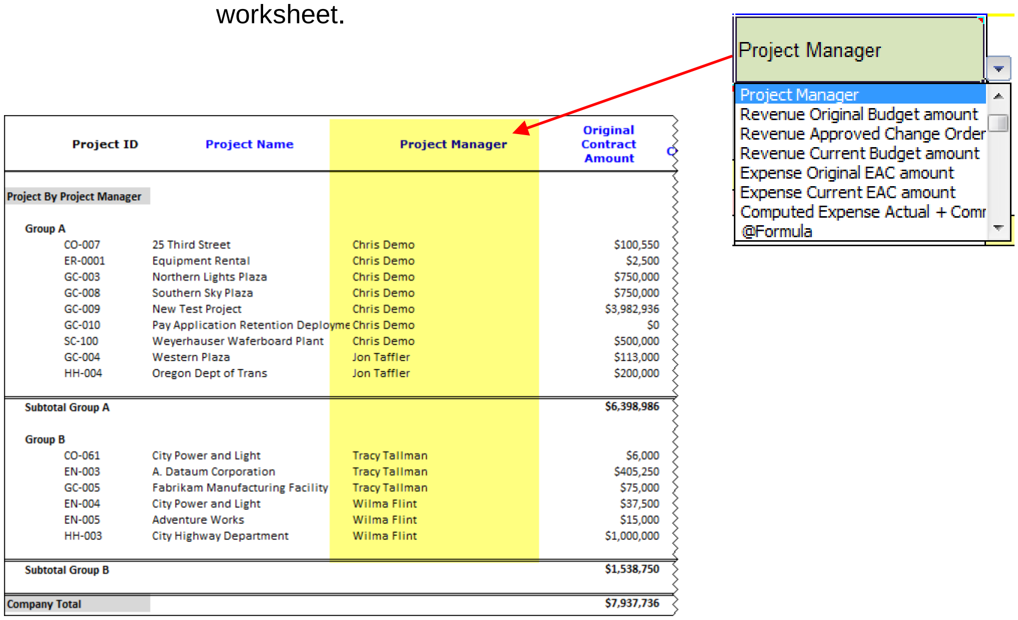
1. Go to the Row Setup worksheet on your EDB template workbook.
2. In D5, enter the **Report Title** for the Advanced Report worksheet, for example:



When the EDB Report workbook is created, this name will be placed on the Advanced Report as the page header. It will appear centered and capitalized, for example:



3. In H5, select the **Filter Column**—the column to consider when grouping and filtering data. The drop-down lists all columns defined by you for the Basic Report in the Column Setup worksheet.



4. In G4, indicate if you want special total rows to be included at the end of the report.

X	Enter "X" for Auto Total - "A" rows, "Y" with compare total row.

- o Type **X** if you want the workbook to create a row with a SumIf formula. You can then compare your total with the report's total to see if they match.

Company Total	$7,937,736
Report Total	$7,937,736

- o Type **Y** if, in addition to the above, you want the workbook to create another row with the total from the Basic Report. You can then compare your total with the Basic Report's total to see if all data is included in the Advanced Report.

Company Total	$7,937,736
Report Total	$7,937,736
Report Total Compare	$7,937,736

- o Leave this cell blank if you do not want either of these total rows at the end of your Advanced Report worksheet.

Understand Row Types

The rows in the Row Setup worksheet are used to define the rows in the Advanced Report worksheet. You can define three types of rows:

- **H** – Header row
- **S** – Subtotal row
- **D** – Detail row

Understand Sum Levels

In order for grouping and subtotaling to work correctly, each header row must have a corresponding subtotal row with the same Sum Level. The Sum Level indicates what information is to be grouped or totaled. Sum Level A adds up all Sum Level B totals within its "bookends." Sum Level B adds up all Sum Level C totals within its bookends; Sum Level C totals all Sum Level D totals within its bookends, etc.

Section	Description	RowType	Print Column	Sum Level	A
1	First Heading	H	A	A	
2	Subheading 1	H		B	
3	Detail for Subheading 1	D		C	
4	Detail for Subheading 1	D		C	
5	Subtotal for Subheading 1	S		B	
6	Subheading 2	H		B	
7	Detail for Subheading 2	D		C	
8	Detail for Subheading 2	D		C	
9	Subtotal for Subheading 2	S		B	
10	Total for First Heading	S	A	A	
11					

Note: if you are using the auto-populate feature for your detail rows (see page 34), you should not include subtotal rows because subtotal rows (with corresponding Sum Levels) will be created by the workbook.

Understand Print Columns

Plan your Headings and Subtotals and decide where each should appear on the Advanced Report worksheet.

- If you indicate that a Header row is to be placed in Print Column A (i.e., column A in the Advanced Report), the row on the Row Setup worksheet will appear in light yellow:

Description	RowType	Print Column
Heading	H	A

- If you indicate that a Header row is to be placed in any Print Column other than A, the row on the Row Setup worksheet will appear in light pink:

Description	RowType	Print Column
Heading	H	C

- If you indicate that a Subtotal row is to be placed in Print Column A, the row on the Row Setup worksheet will appear in bright yellow:

Description	RowType	Print Column
Heading	S	A

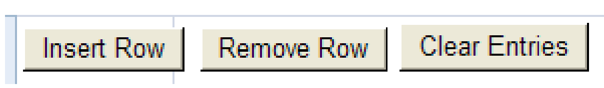
- If you indicate that a Subtotal row is to be placed in any Print Column other than A, the row on the Row Setup worksheet will appear in bright pink:

Description	RowType	Print Column
Heading	S	B

Note: on the printout (output), headers and subtotals in column A will appear with a gray background; others will not.

Use Control Buttons

As you design your Advanced Report worksheet, you can add and delete rows in the Row Setup worksheet or clear all of your entries. In order to use one of these buttons, you must be in a cell that is between columns B – H under row 6.



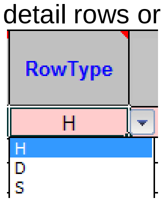
- **Insert Row** – creates a new blank row above your current location. Your current row and those below are moved down one row.

- **Remove Row** – deletes the current row and moves all rows below the current row up one row.
- **Clear Entries** – asks you to confirm removal of all existing entries. If you click 

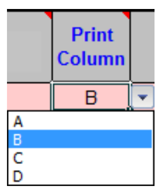
, all entries will be deleted.

Define Your Rows

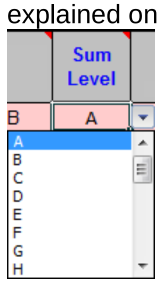
1. In the **Description** column (B), enter display text for headers and subtotals. Detail rows will inherit the description from the Filter Column selection.
2. In the **Row Type** column (C), select **H** for header rows, **D** for detail rows or **S** for subtotal rows.



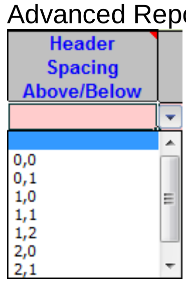
3. In the **Print Column** column (D), select a column from A – D to indicate where the row should begin on the Advanced Report worksheet.



4. In the **Sum Level** column (E), select a level for this row, as explained on page 31.



5. In the **Header Spacing Above/Below** column (F), select the number of blank rows to be placed before/after this row in the Advanced Report worksheet. The choices range from 0,0 to 2,2.



6. (*For Detail rows only*) In the **Filter Column Range (Start)** column (G), indicate the start of the range to be used on the Filter Column (the column you selected in H5).
    - You can enter an exact value, for example **Chris Demo**.
    - You can use the wildcard **#**, for example C# (to mean "every value that starts with C") or #003 (to mean "every value that ends with 003").
    - You can enter **%** in the first Detail row to auto-populate the detail rows. (See below.)
7. (*For Detail rows only*) In the **Filter Column Range (End)** column (H), indicate the end of the range to be used on the Filter column (the column you selected in H5).
    - You can enter an exact value that is different from the Start value.
    - You can use the wildcard **#** as described above.
8. Enter all your rows on the Row Setup worksheet.
9. In I8 (**Show WS**), indicate whether you want this Row Setup worksheet to appear in the EDB Report workbook (that is created when you export data). If you do not want general users to have access to this worksheet, keep the default of **No**.
10. Save your work.

The Auto-populate Feature

If you enter **%** in the first Detail row of the Row Setup worksheet, the following will be displayed on the Advanced Report:

TIP
The print area is automatically dimensioned for all reports and should accommodate various projects without setup by you.

- The Filter Column data will be sorted ascending.
- Each time the Filter Column value changes, a title row will be created with the current value.
- Each row matching the current group (i.e., the value in the title row) will be recorded in order based on the sorting of the Filter Column.
- Each time the Filter Column value changes, a subtotal row will be created for the prior group.
- If the value is missing on some detail rows, the group title will be NO VALUE ASSIGNED.

Examples for the Filter Column "Project Manager".

Section	Description	RowType	Print Column	Sum Level	Header Spacing Above/Below	Filter Column Range (Start)	Filter Column Range (End)
1	Project By Project Manager	H	A	A	1,1		
2	Sorted by PM	H	B	B	0,0		
3	PM Details	D	D	C	0,0	%	
4	Company Total	S	A	A	0,0		

Auto-populate

Project ID	Project Name	Project Manager	Original Contract Amount
Project By Project Manager			
Sorted by PM			
CHRIS DEMO			
CO-007	25 Third Street	Chris Demo	$100,550
ER-0001	Equipment Rental	Chris Demo	$2,500
GC-003	Northern Lights Plaza	Chris Demo	$750,000
GC-008	Southern Sky Plaza	Chris Demo	$750,000
GC-009	New Test Project	Chris Demo	$3,982,936
GC-010	Pay Application Retention Deployme	Chris Demo	$0
SC-100	Weyerhauser Waferboard Plant	Chris Demo	$500,000
Subtotal Chris Demo			**$6,085,986**
JON TAFFLER			
GC-004	Western Plaza	Jon Taffler	$113,000
HH-004	Oregon Dept of Trans	Jon Taffler	$200,000
Subtotal Jon Taffler			**$313,000**
TRACY TALLMAN			
CO-061	City Power and Light	Tracy Tallman	$6,000
EN-003	A. Dataum Corporation	Tracy Tallman	$405,250
GC-005	Fabrikam Manufacturing Facility	Tracy Tallman	$75,000
Subtotal Tracy Tallman			**$486,250**
WILMA FLINT			
EN-004	City Power and Light	Wilma Flint	$37,500
EN-005	Adventure Works	Wilma Flint	$15,000
HH-003	City Highway Department	Wilma Flint	$1,000,000
Subtotal WILMA FLINT			**$1,052,500**
Company Total			**$7,937,736**

Filter Column

Title row created automatically

Subtotal row created automatically

Section	Description	RowType	Print Column	Sum Level	Header Spacing Above/Below	Filter Column Range (Start)	Filter Column Range (End)
1	Project By Project Manager	H	A	A	1,1		
2	Group A	H	B	B	0,0		
3	PM Details	D	D	C	0,0	A#	L#
4	Group A	S	B	B	1,1		
5	Group B	H	B	B	0,0		
6	PM Details	D	D	C	0,0	M#	Z#
7	Group B	S	B	B	1,1		
8	Company Total	S	A	A	0,0		

		Project ID	Project Name	Project Manager	Original Contract Amount
Project By Project Manager					
	Group A				
		CO-007	25 Third Street	Chris Demo	$100,550
		ER-0001	Equipment Rental	Chris Demo	$2,500
		GC-003	Northern Lights Plaza	Chris Demo	$750,000
		GC-008	Southern Sky Plaza	Chris Demo	$750,000
		GC-009	New Test Project	Chris Demo	$3,982,936
		GC-010	Pay Application Retention Deployme	Chris Demo	$0
		SC-100	Weyerhauser Waferboard Plant	Chris Demo	$500,000
		GC-004	Western Plaza	Jon Taffler	$113,000
		HH-004	Oregon Dept of Trans	Jon Taffler	$200,000
	Subtotal Group A				$6,398,986
	Group B				
		CO-061	City Power and Light	Tracy Tallman	$6,000
		EN-003	A. Dataum Corporation	Tracy Tallman	$405,250
		GC-005	Fabrikam Manufacturing Facility	Tracy Tallman	$75,000
		EN-004	City Power and Light	Wilma Flint	$37,500
		EN-005	Adventure Works	Wilma Flint	$15,000
		HH-003	City Highway Department	Wilma Flint	$1,000,000
	Subtotal Group B				$1,538,750
Company Total					$7,937,736

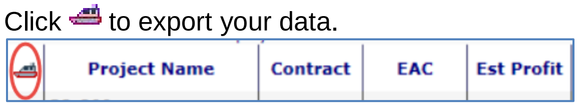
Project Managers from A through L inclusive

Project Managers from M through Z inclusive

Review the Advanced Workbook

The only way to find out if your data appears the way you intend it to appear is to use your template.

1. If you haven't already, save your work and close the workbook. Provided you opened the workbook as a template, it will save as a template (**.xltm**) file.
2. Log in to sfPMS.
3. Go to the Executive Dashboard.
4. Use the filters on the Executive Dashboard (see page 5) to display the data that you will want on your report worksheet.
5. Click to export your data.



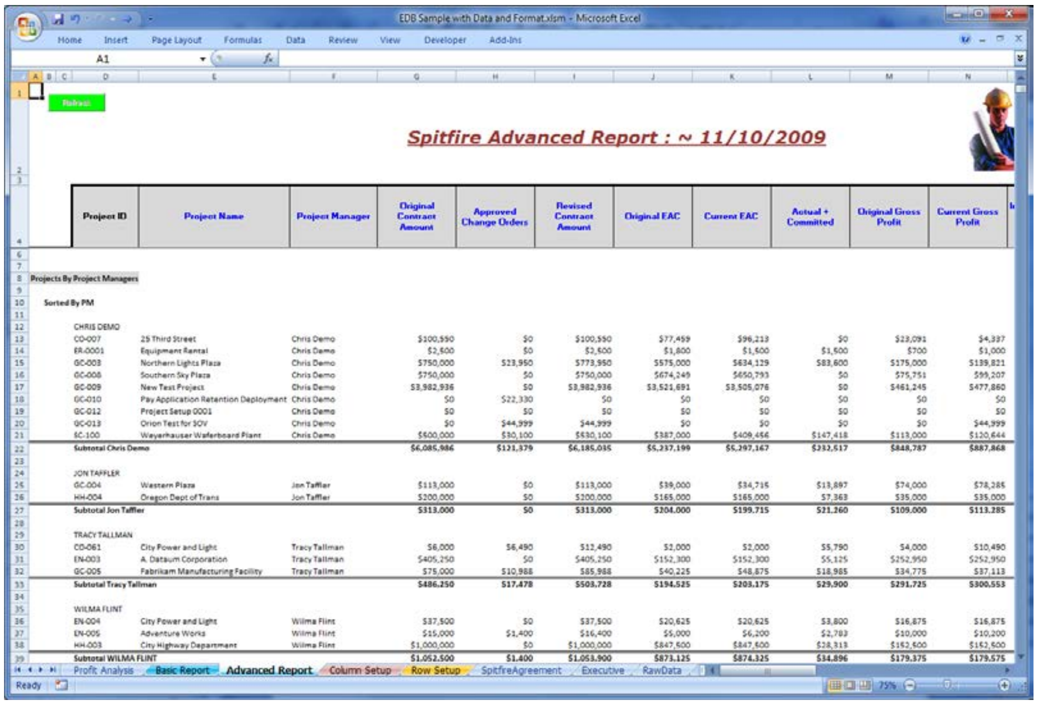
6. On the dialog box that appears, click at the **Using Template** field to find your EDB Report template on your computer.

7. If the Spitfire Agreement appears when your report workbook first opens, click the **Continue** button. The Basic Report worksheet will then appear.

8. Click the tab to open the Advanced Report. The data will be presented according to your instructions on the Row Setup worksheet.

9. Look over the report worksheet carefully, checking for correct headers and subtotals and ensuring that it is formatted as you designed. If you find mistakes, jot them down. You will make changes back in the template file, not in this report file.

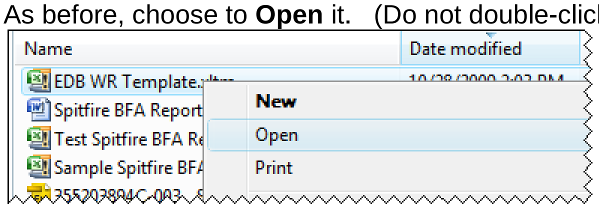
10. Close the report workbook without saving it.



Edit the Advanced Report

1. Locate your EDB Template workbook on your computer. It should have an **.xltm** extension.

2. As before, choose to **Open** it. (Do not double-click to open it.)



3. Make your changes on the Row Setup worksheet.

4. Save your template workbook.

5. Close your template workbook. You should [upload the template into Spitfire] so that all your users can select it (see page 39).

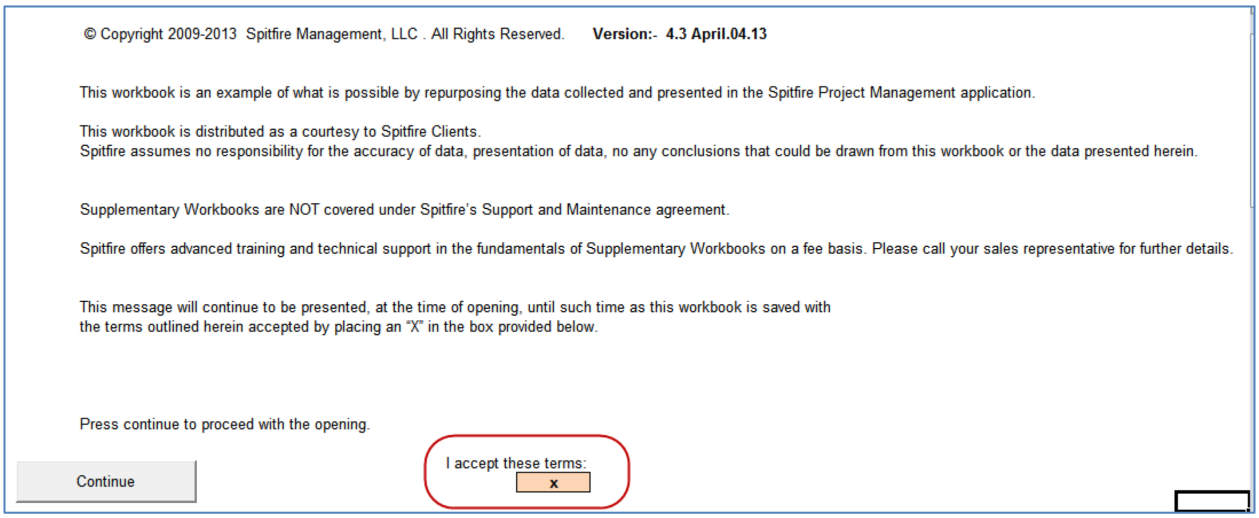
Your Finished EDB Report Template File

When you have finished creating and configuring your EDB Report template file (with your multiple reports) and consider it ready for your users, there is one more thing you should do before uploading the file into sfPMS.

Spitfire Agreement

To configure your template file for auto-launch-and-build:

1. Open your EDB Template file (.xltm) one more time.
2. On the SpitfireAgreement sheet, click on the cell under **I accept these terms**, and type an **X**.



3. Save the file.

Now (after you upload the template file), when users select the EDB Report template file, they will bypass the Spitfire Agreement and the workbook will open on either the Basic Report or Advanced Report, depending on setup. In addition, the Row Setup and Column Setup worksheets will appear only if so configured.

Your EDB Report template workbook is ready to be uploaded to sfPMS so that other users can access the template by default during an Executive Dashboard export.

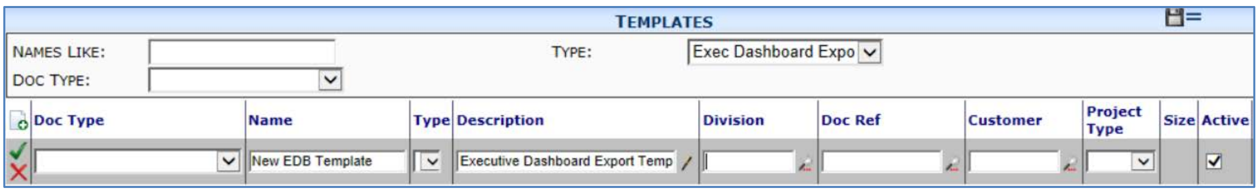
The Template Tool

You upload your template file through Spitfire's Template tool. You can access this tool either from the Manage Dashboard or the System Admin Dashboard. (For information about the Template tool, see the *Focus on the Manage Dashboard* guide.)

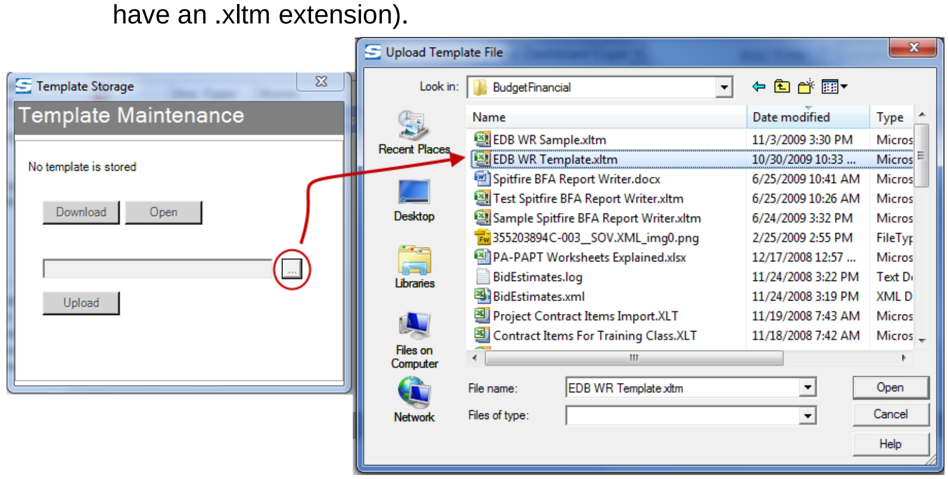
Upload Your Template

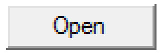
1. At the Templates tool, select **Exec Dashboard Export** as the Type. If there are any EDB Report templates already in Spitfire, they will be listed. You can have multiple templates for the export function on the Executive Dashboard.

2. Click to add a row.



3. Leave the Doc Type field blank.
4. (*optional*) Change the **Name** of the template to reflect the name of your file.
5. Leave the Type as **Exec Dashboard Export**.
6. (*optional*) Change the **Description** for the template file.
7. Leave the Company, Doc Ref and Customer fields blank. They do not apply to your EDB Report template.
8. Click to accept your row.
9. Click to save.
10. Click (which will appear on the row). The Template Maintenance dialog box will appear.
11. Click to browse for your EDB Report template file (it should have an .xltm extension).



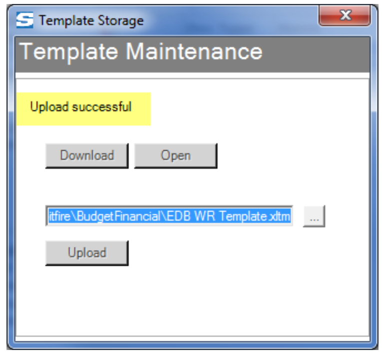
12. Click 

.

13. Back on the Template Maintenance dialog box, click 

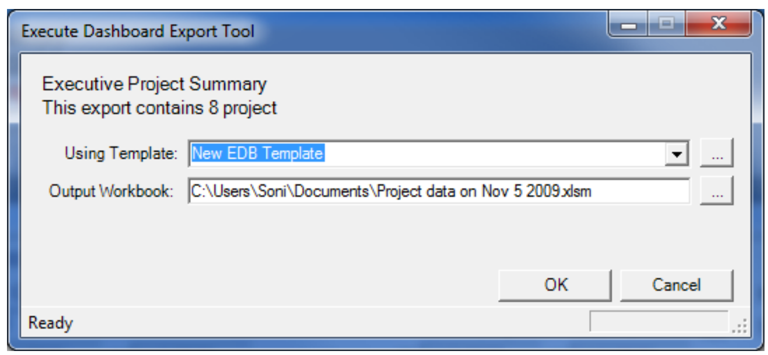
.

14. When the Template Maintenance dialog box says "Upload successful," click  to close it.



15. Back on the Templates tool, click  to save it again.

The next time you or someone else chooses to export the Executive Dashboard (see page 10), this newly uploaded template workbook will appear as the default template file:



Note: if you have more than one EDB Report template, all templates will appear in the drop-down. You will have to choose which one you want each time.

Re-upload Your Template

You may need to replace the EDB Report template workbook with another.

- If, after uploading your template, you realize you want to change it, make your changes to your **.xltm** file on your computer. After you save the template file, you will need to replace your old version in sfPMS with your new version.
- If you want a totally different template workbook to be used instead of the current one, create your new **.xltm** file on your computer. After you save the template file, you will need to replace your current template with your new template.

1. Go back to the Templates tool on either the Manage or System Admin Dashboard.
2. Select **Exec Dashboard Export** as the Type. Your existing template will appear.
3. Click to open the Template Maintenance dialog box.
4. Click to browse for your EDB Report template file then click .
5. Back on the Template Maintenance dialog box, click .
6. When the Template Maintenance dialog box says “Upload successful,” click to close it.
7. Back on the Templates tool, click to save it again.

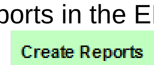
EDB Report Output

This chapter discusses the output you create when using a template designed through the EDB Report Tool.

When you use the export option from the Executive Dashboard and choose your EDB Report template, sfPMS creates an **.xlsm** file. This output Microsoft Excel file contains your data in the report worksheets you designed.

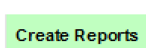
What Appears in the EDB Report Workbook

Which worksheets are generated and populated with data when you first create your EDB Report output through your template depends on the following:

- If the Spitfire Agreement in the template file was not already accepted (see page 38), the SpitfireAgreement worksheet will appear first.
- If the Row Setup worksheet was used to set up an Advanced Report worksheet, the EDB Report workbook will open on the Advanced Report worksheet.
- If there is no Advanced Report (and the Basic Report was set up through the Column Setup worksheet), the EDB Report workbook will open on the Basic Report worksheet.
- If other worksheets were created in the EDB Report template, those tabs will appear in the Basic Report workbook. You can view any worksheet by clicking on its tab.
- If any reports were set to "auto-start" (see page 17), those reports will include current data.
  Note: If worksheets for those reports do not exist in the template, they are automatically created (without user formatting or embellishments) when needed.
- If there are reports in the EDB Report template that are not set to auto-start, the 

 button will appear on the Basic Report (see below).

The Create Report Button

The 

 button on the Basic Report lets you know that there are other reports that can be generated as part of your EDB Report workbook. This button does not appear if all possible reports are already generated and included in the EDB Report workbook.

To generate other reports:

- Click **Create Reports**. Any reports that were set up (through the Column Setup worksheet) and were not auto-started are created now and populated with data. You can view/open any of these reports by clicking on the appropriate worksheet tab.

Important Note: When you choose to create reports, all existing worksheets (reports) in your EDB Report workbook are generated again. Therefore, while it is possible for you to make changes to your data directly on any worksheet, we recommend that you do so only after you have all the reports you want. For example, if you want to change some numbers directly on the Basic Report, but also want to generate an optional Monthly Report, you should create reports first, then make your changes to the Basic Report. Otherwise, your changes to the Basic Report will be wiped out when you create reports.

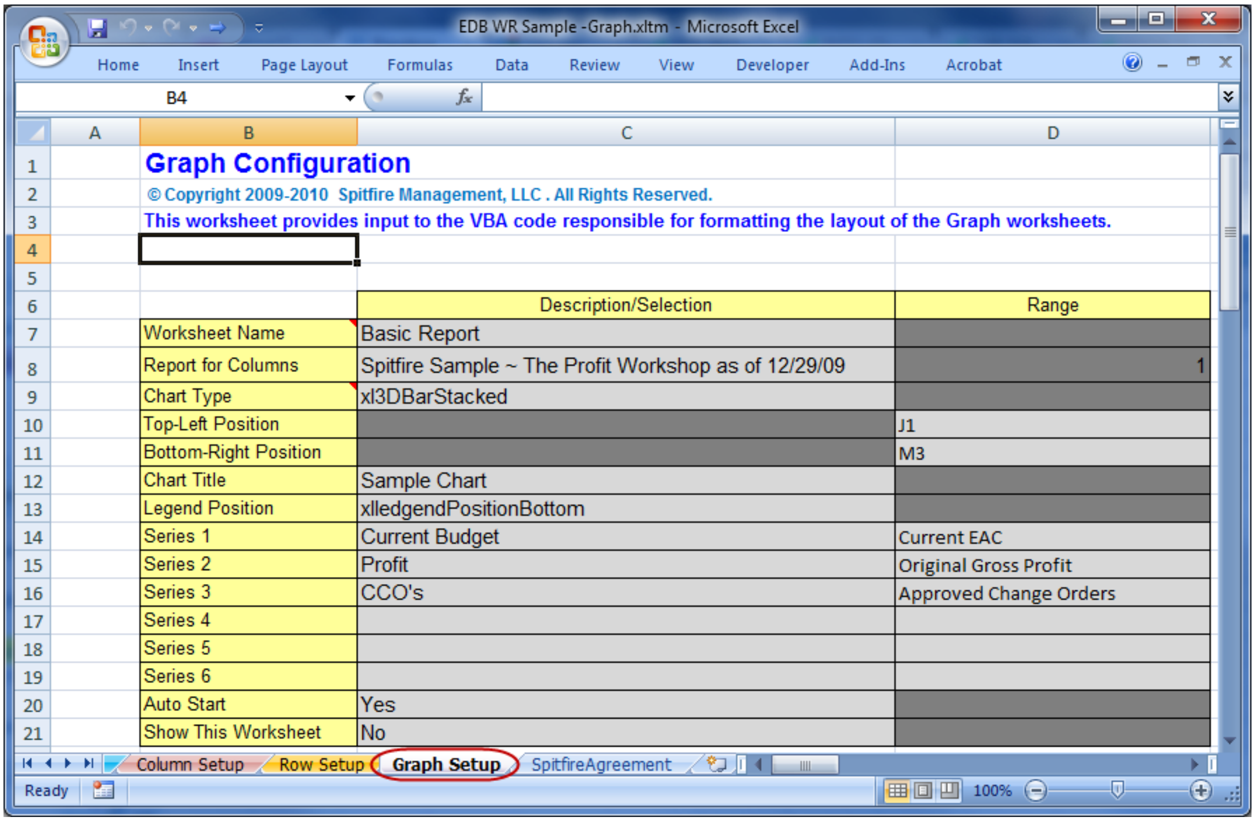
Saving Your Output

If you want to keep the EDB Report workbook with all its generated worksheets, you should save Microsoft Excel in the usual way. You will be saving an **.xlsm** file.

Appendix A: Graph Worksheet

Spitfire distributes a template file that is similar to the EDB WR blank.xltm file mentioned in this technical white paper, but which also includes a graph setup worksheet. The graph template file is called **EDB WR Blank-Graph.xltm**.

Graph Setup



The Graph Setup worksheet allows you to define a chart or graph for your reports.

Define the Graph/Chart

1. In C7, enter the **Worksheet Name** of the report where you want the graph to appear. If you leave this cell blank, a new worksheet with this name will be created.
2. In C8, select a **Report for Columns** from the drop-down. Your choices are the "Table Names" that are entered in the Column Setup worksheet (see page 17). This report will provide the data from which to build the graph.
3. In C9, select the **Chart Type** you want from the drop-down. You can choose from 71 standard Microsoft Excel chart types.
4. In D10, enter the cell reference (e.g., J1) that identifies the **Top-Left Position** of the graph's placement.

5. In D11, enter the cell reference (e.g., M3) that identifies the Bottom-Right Position of the graph's placement. The column designation defines the chart width using the actual column widths between the top-left and bottom-right, while the row designation defines the chart height, using the actual row heights between the top-left and bottom-right.

   Note: the graph placement is approximate. Many factors, such as worksheet magnification and font size, affect the results.

6. (*optional*) In C12, enter the **Chart Title** for your graph, if the chart type allows for a title.

7. In C13, select a **Legend Position** from the drop-down. You can select from six standard Microsoft Excel legend positions.

8. Define the legend.
   - In C14, enter a label for the first series to appear on the legend (**Series 1**).
   - In D14, select the data column for the first series to appear on the legend (**Series 1**). The drop-down choices are the column titles defined on the Column Setup worksheet (see page 20).
   - In rows 15-19, enter a label and select a data column for additional series (up to six), as desired.

9. In C20, select either **Yes** or **No** to indicate whether the graph should be created during opening (**Auto Start**).
   Note: at this time, there is no way to create the graph after opening so **No** means that the graph will not appear at all.

- In C21, select either **Yes** or **No** to indicate whether the Graph Setup worksheet should be visible to users when the template is opened from the Executive Dashboard (**Show This Worksheet**).

10. Save ( ) your template (**.xltm**) file.

Example of Graph

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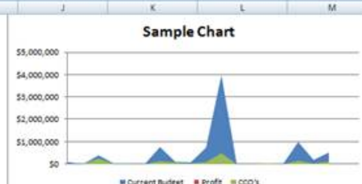
Spitfire Sample ~ The Profit Workshop as of 01/04/10



Project ID	Project Name	Project Manager	Original Contract Amount	Approved Change Orders	Revised Contract Amount	Original EAC	Current EAC	Actual + Committed	Original Gross Profit	Current Gross Profit	Increase/Decrease in Gross Profit	% Increase/ Decrease in Gross Profit
Total			**$7,937,736**	**$140,257**	**$8,055,663**	**$6,508,849**	**$6,574,382**	**$318,572**	**$1,428,887**	**$1,481,281**	**$52,394**	
CO-007	25 Third Street	Chris Demo	$100,550	$0	$100,550	$77,459	$96,213	$0	$23,091	$4,337	[illegible]	-432.42%
CO-061	City Power and Light	Tracy Tallman	$6,000	$6,490	$12,490	$2,000	$2,000	$5,790	$4,000	$10,490	$6,490	61.87%
EN-003	A. Datum Corporation	Tracy Tallman	$405,250	$0	$405,250	$152,300	$152,300	$5,125	$252,950	$252,950	$0	0.00%
EN-004	City Power and Light	Vilma Flint	$37,500	$0	$37,500	$20,625	$20,625	$3,800	$16,875	$16,875	$0	0.00%
EN-005	Adventure Works	Vilma Flint	$15,000	$1,400	$16,400	$5,000	$6,200	$2,783	$10,000	$10,200	$200	1.96%
ER-0001	Equipment Rental	Chris Demo	$2,500	$0	$2,500	$1,800	$1,500	$1,500	$700	$1,000	$300	30.00%
GC-003	Northern Lights Plaza	Chris Demo	$750,000	$23,950	$773,950	$575,000	$634,129	$83,600	$175,000	$139,821	[illegible]	-25.16%
GC-004	Western Plaza	Jon Taffler	$113,000	$0	$113,000	$39,000	$34,715	$13,897	$74,000	$78,285	$4,285	5.47%
GC-005	Fabrikam Manufacturing Facility	Tracy Tallman	$75,000	$10,988	$85,988	$40,225	$48,875	$18,985	$34,775	$37,113	$2,338	6.30%
GC-008	Southern Sky Plaza	Chris Demo	$750,000	$0	$750,000	$674,249	$650,793	$0	$75,751	$99,207	$23,456	23.64%
GC-009	New Test Project	Chris Demo	$3,982,936	$0	$3,982,936	$3,521,691	$3,505,076	$0	$461,245	$477,860	$16,615	3.48%
GC-010	Pay Application Retention Deployment	Chris Demo	$0	$22,330	$0	$0	$0	$0	$0	$0	$0	0.00%
GC-012	Project Setup 0001	Chris Demo	$0	$0	$0	$0	$0	$0	$0	$0	$0	0.00%
GC-013	Orion Test for SOV	Chris Demo	$0	$44,999	$44,999	$0	$0	$0	$0	$44,999	$44,999	100.00%
GC-014	Workflow for initial budget	Chris Demo	$0	$0	$0	$0	$0	$0	$0	$0	$0	0.00%
HH-003	City Highway Department	Vilma Flint	$1,000,000	$0	$1,000,000	$847,500	$847,500	$28,313	$152,500	$152,500	$0	0.00%
HH-004	Oregon Dept of Trans	Jon Taffler	$200,000	$0	$200,000	$165,000	$165,000	$7,363	$35,000	$35,000	$0	0.00%
SC-100	Weyerhauser Waferboard Plant	Chris Demo	$500,000	$30,100	$530,100	$387,000	$409,456	$147,418	$113,000	$120,644	$7,644	6.34%