



PLANFORCE GUIDE

Reporting

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Introduction

This guide will walk you through Planforge's reporting feature. It's organized in two parts:

The first part covers the fundamental concepts you need to work with reports: How reports work and are structured, and how to create, configure, and run them in Planforge.

The second part consists of five hands-on examples, each walking through a specific report from requirements to completion in detailed, step-by-step fashion.

We recommend starting by working through the first part up to the Document Reports chapter and then following along with the simple tabular report in the second part. This will give you a solid foundation in the reporting feature that you can then build on by returning to the remaining chapters and examples. Of course, the guide reads just as well front to back, if you prefer.

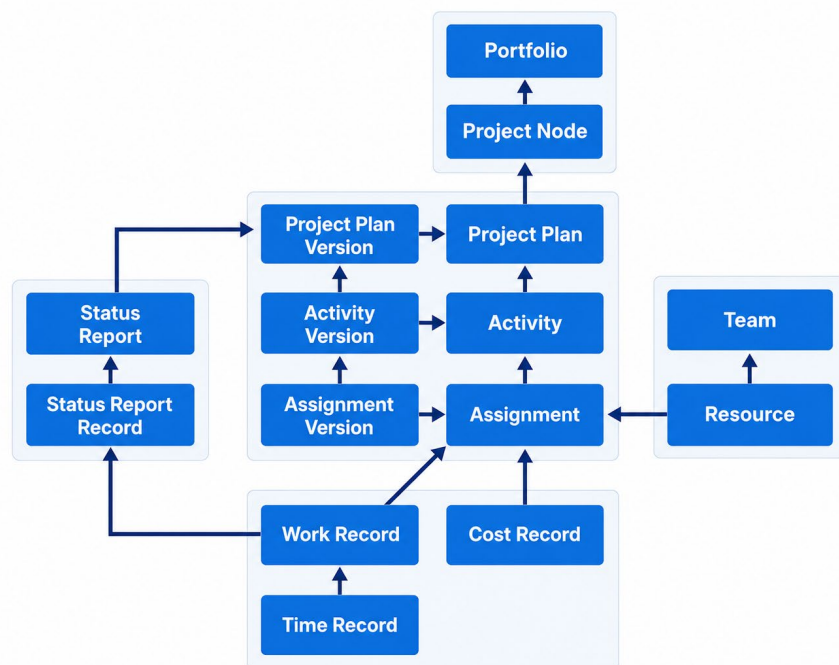
How Reports Work

All information in Planforge is stored in a **database** made up of tables. These tables represent the **business objects** in Planforge and store their information in fields.

The tables are **relational**, meaning the content of a field can also point to another table. A **report** is a database query that retrieves specific information from fields in these tables.

A **business object** is a core data entity in Planforge — for example, portfolios, projects, project plans, pipeline phases, resources, meetings, or status reports.

The diagram below illustrates this. The various business objects are linked to one another and stand in relation to each other.



For example, resources and teams are connected to projects through their assignment to an activity in the project plan. They are in turn then connected to portfolios through the project.

Assignments, activities, and project plans each exist in different versions. The **latest version** is also available as its own business object (e.g., activity version).

The Three Report Categories

Planforge offers three different report categories:

Report Category	Description
Simple report	The basic building block. Retrieves information from one or more fields of one or more business objects. Can be displayed in different layouts.
Document re-report	Combines multiple simple reports based on a shared business object into one cohesive report.
Compound re-report	Combines a summary report with a detail report that is run repeatedly for multiple instances of a business object (e.g., all projects in a portfolio).

General Tips

- **Before creating a report, think about** what information you want to present and who the report's audience is.
- **Use pre-built reports as a template** for your own. Open an existing report, review its properties, and use them to work out the right configuration for your report.
- **Start with simple reports.** Document reports and compound reports are both based on simple reports.
- **Less is more:** Only query the fields you actually need to keep the report easy to read.
- **User input increases flexibility.** Instead of creating a separate report for every scenario, set queries to user input. That way, a single report can serve multiple use cases and audiences.
- **Check the permissions.** Make sure you know who can run the report and what information that will expose.

Running Pre-Built Reports

Planforge already provides you with a number of **pre-built reports**. Let's take a look at one of them to get started.

You can download additional pre-built reports via
[Planforge Reports](#).

HOW TO OPEN A REPORT

1. Navigate to **REPORTS**.
2. On the left, you'll see a navigation pane with pre-built reports and folder structures.
3. Select the simple report **Project List**. The corresponding information for the report appears in the main view under the tabs *Overview*, *Properties*, and *Archive*.
4. In the tab **Overview**, use the dropdown menu to select the desired business object (e.g., a portfolio or project).
5. Click **Run** to generate the report.
6. Click **Download** to save the report in one of the available formats, such as PDF.
7. Under ... > **Archive** you can save the report you just ran to the *Archive* tab in various formats. From there, you can pull it up again later. This is especially useful for large reports, since you won't have to run them again each time.

In the *Properties* tab, you can see **which fields and settings make up the report**.

Compare these with the explanations of simple reports below to get a better sense of how each setting affects the report.

Simple Reports

Simple reports are the basic building block of the reporting system — every other report type builds on them. They're created using a wizard that walks you through the configuration step by step.

CREATING A NEW REPORT

1. In the navigator, select a folder and click **New**.
2. Select **Simple Report**.
3. The wizard opens. Follow the individual steps.

STEP 1 — NAME & TYPE

In this step, you define the basics of your report. This includes the **name**, the **report type**, and the **layout**.

Report Type

A report only queries a part of the database, not all of it.

The report type determines which part of the database is available to the report and from which perspective the data is queried. This perspective is called the **anchor point**.

The anchor point is the **primary business object** of the report type. This business object's table can be queried directly, and the other tables are queried from its perspective.

The other queryable tables are defined in the report type as a set of business objects and fields. Not all information can be queried from them — only what is connected to the primary business object.

Choosing the right report type therefore means choosing one that can retrieve the correct primary dataset as its anchor point, and its set also needs to include all the business objects and fields that you want to display information from in the report.

Report type names indicate the primary business object using the following pattern:

Pattern	Meaning
X or X with Y	X is the primary business object of the query, as in <i>Portfolios</i> or <i>Projects with Pipeline Stages</i> . It forms the report's anchor point. Beyond that, additional business objects are available whose fields can be queried from this perspective.
All/Latest X, or X with Y	As above, but combined with business objects that can exist in multiple versions or instances. All: Can query every version or instance of the business object. Latest: Only queries the most recent version or instance of the business object. Example: Status reports are created at a set interval, so a project typically has several of them. The report type <i>All Status Reports</i> can query all of these status reports. The report type <i>Latest Status Report</i> only queries the most recently created status report.

Example:

- In the report type *Ideas*, the primary business object is *Idea*.
- For this report type, the defined set of business objects and fields also includes, among others, *Idea*, *Portfolio*, *Project Node*, *Resource*, and *Activity*.
 - These can be selected in Step 2 of report creation.

In this report type, the idea table is the anchor point. All fields are queried from the perspective of this table, so the query can only return information that relates to an idea.

For project (*Project Node*) and activity fields (*Activity*), for example, only projects and activities that are linked to an idea can be returned. Other projects and activities can't be queried through this report type.

Project plan information, on the other hand, is entirely out of reach through this report type, since the corresponding business object isn't part of the defined set.

Layout

The layout determines how the retrieved information is displayed.

Layout	Description
Tabular	Displays data of different types in a table. Rows can be grouped and sorted, and columns can be aggregated. The default layout for most use cases.
Chart	Displays information graphically (e.g., a Gantt chart or WBS). Parameters such as view type, time unit, and start/end date can be fixed or set as user input. Well suited for visual overviews.

Matrix	Displays data from a single field — and therefore a single data type — in a table with row and column headers. Rows and columns can be grouped, sorted, and aggregated independently of each other. Particularly well suited for showing a series of values across a second dimension , such as costs or effort across several months.
Description	Displays data of different types in a two-column table. Grouping, sorting, and aggregating aren't possible. Well suited for displaying simple content , such as in forms.
Image	Displays the content of a single image field , such as project logos or images from attachments.
Textfield	Displays fields as text blocks, stacked one below another. Grouping and sorting aren't possible. Well suited for textfields or notes .

STEP 2 — FIELD(S)/MATRIX

Here you select which information to query from the business object tables for the report. As described above, the available fields depend on the report type you've chosen.

How to Add Fields

1. In the left-hand column, **Available Business Objects**, select an object.
2. The available fields for this object then appear to the right.
3. Select one or more fields and click the **right arrow** to add them.

Added fields are named following the pattern
<Business Object>.<Field>.

Example:

The field *Display Name* of the object *Responsible Resource* appears as *Responsible Resource.Display Name*.

With the Matrix layout, Steps 2 and 3 are combined. There, you configure both the field choice and the column grouping/sorting in a single step.

What Happens When Multiple Fields Are Queried

Since the data retrieved through a field exists in table form, it's also output as a table. When two or more fields are retrieved, it's not unusual for these tables to differ in size.

In the report, however, everything has to be displayed in a single table, so the tables need to be merged. In effect, they're multiplied together.

The resulting table is often considerably larger and may contain redundant information.

Example:

- Report type: *Projects with Pipeline Stages*.
- Fields: *Project Node.Name*, *Plan Version.Version Number String*.

First, run the report with only the field *Project Node.Name*. Depending on the existing projects, this produces a simple table. In our ex-

Projektname
CP2

ample, it contains one project.

Now add the field *Plan Version.Version Number String*. All existing plan versions are now retrieved for each project, producing the table shown below.

The project name is repeated for each plan version. As a result, the merged table is larger and contains some redundant information.

Understanding this makes it easier to estimate the approximate size

Projektname	Planversion
CP2	0
CP2	1
CP2	2
CP2	3
CP2	5
CP2	6

of the final result table and plan the next steps accordingly.

This redundancy can be reduced through grouping (see Step 4).

STEP 3 — COLUMNS / MATRIX

In this step, you define how the selected fields are displayed. This step isn't available for the *Chart* and *Image* layouts, and for the *Matrix* layout, you configure this in step 2.

Option	Description
Title	The column heading in the report. If left blank, the field name is used.
Detail	The unit of the displayed information, e.g., effort in hours or days. Not available for all fields.
Format	The display format, e.g., numbers shown as decimals or rounded.
Aggregation	Only for <i>Matrix</i> and <i>Tabular</i> : The method used to calculate aggregated values, e.g., sum or average.

STEP 4 — GROUPING & SORTING

This step is only available for the *Matrix* and *Tabular* layouts. Here, you define how the rows of your report are grouped and sorted.

For matrix reports, choose a different grouping for the rows than the one used for the columns in Step 2, otherwise, the matrix won't produce sensible information.

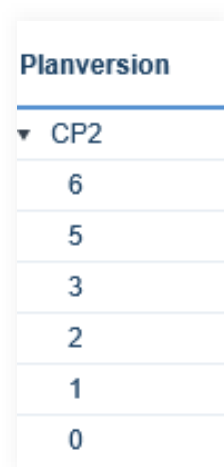
Grouping

A grouping combines rows that share a common field value.

Example:

In Step 2, we saw the redundancy that can result from merging tables. Grouping can reduce this redundancy.

To do this, remove the field *Project Node.Name* from Step 2 and add it as the first grouping instead. The project name will now only appear as a group heading, with the various plan versions listed indented below it.



The screenshot shows a table with a header 'Planversion'. Below the header, there is a dropdown menu showing 'CP2'. Under 'CP2', there are seven rows with values 6, 5, 3, 2, 1, and 0, listed from top to bottom.

Planversion
▼ CP2
6
5
3
2
1
0

Sorting

Sorting arranges rows in ascending or descending order based on field values.

Example:

Select the field *Activity.WBS Code*. The activities will then be displayed in order of their WBS code.

- Groupings are always applied before sorting.
- Group headings are sorted alphabetically by default.

- To change this order, select your desired sort field at sort level 1, and at sort level 2, select the same field you used for grouping.

STEP 5 — QUERY & INPUT

Here you define which data appears in the report. There are two types of queries:

- **Fixed query:** The comparison value never changes. The filter is applied automatically every time the report runs.
- **User input:** The user enters the comparison value themselves each time the report runs. Ideal for flexible reports.

Both types can be combined within a single report.

Key Operators

Operator	Meaning & Example
equal	An exact match.
like	Works like SQL LIKE . Example: P% on <i>Project.Number</i> returns all projects whose number starts with P.
in	Works like SQL IN , but using semicolons as separators. Example: Europe; Asia; Americas on <i>Portfolio.Name</i> returns the projects contained in the portfolios of those names.

Only the *in* operator can return entire hierarchies.

If you apply this operator to a field that describes a node in a hierarchy (e.g., *Project Node.Project Node* for *portfolios* or *projects*), the entire hierarchy below the node defined in the query value is returned.

Example:

Portfolio A contains one project and the two other Portfolios B and C, which also contain projects. With a fixed *in* query on the ID of Portfolio A, you get all the projects from all three portfolios. An *equal* query would only return the project from Portfolio A.

Want to create a dropdown selector (input query)?

Choose a field that allows multiple results (e.g., *Project Node.Risk Classification* or *Project Node.Project Node*), set the operator to *equal*, and enable *Input*. This lets you select a single risk classification or a single project.

If you use the *in* operator instead, you can select multiple items at once in the dropdown (using Ctrl or Shift) or select entire hierarchies.

Show in Context-Sensitive Report Menus

When this option is enabled, the report appears directly in the context menu of the corresponding business object (e.g., under *Project Properties > Download Report*).

STEP 6 — PERMISSIONS

In this final step, you define who can view and run the report. This works on the same principle as permissions in projects and portfolios.

Resources with the *Observe* right can run reports. This means they may be able to view information they wouldn't otherwise have access to.

Document Reports

A document report combines multiple simple reports into a single cohesive document — for example, a complete project report.

WHEN SHOULD I USE DOCUMENT REPORTS?

- You want to combine multiple simple reports for a single business object (e.g., a project) into one document.
- You need a structured, multi-page output with headings and a chapter structure.

CONFIGURATION

Name & Type

Besides the name, you also define the following here:

- **Header / Subheader / 2nd and 3rd Subheader:** These headers appear at the beginning of the document.
- **Business Object:** The shared business object that all included simple reports must have in common. For example, if you select *Project*, every report you add must have either
 - a user input query on *Project Node* (and no others),
 - or no user input query at all.
- **Object Title:** The label for the dropdown menu that lets users select the business object (e.g. the project or portfolio).
- **Automatic Numbering:** Numbers all sections sequentially.
- **Show in Context-Sensitive Report Menus:** Lets you launch the report directly from the business object's menu (e.g., from the project properties).

Adding Reports

In the Report Title / Report Description / Section Title area, add the simple reports you want to appear in the document.

- The report description is automatically taken from the corresponding simple report.
- The section title appears in the document above the respective simple report's output.
- Double-click an added report to edit its properties (e.g., the layout in which it appears in the document).

The document report automatically creates a dropdown menu for object selection — you don't need to configure this manually.

Compound Reports

Compound reports are ideal when you want to run a specific report (simple or document) once for multiple instances of a business object — for example, a status report for every project in a portfolio.

STRUCTURE OF A COMPOUND REPORT

- **Summary report (optional):** Runs once for the main object (e.g., the portfolio).
- **Detail report (required):** Runs once for each sub-object (e.g., for every project in the portfolio).

CONFIGURATION

Business Object

The business object follows the syntax *X with Y*:

- X determines the main object and the user input dropdown menu.
- The summary report runs once for X.
- The detail report runs once for each Y.

Example:

- Business object *Portfolio with Latest Status Reports*.
 - The dropdown menu prompts for the portfolio (X).
 - The detail report runs for every latest status report (Y) within that portfolio.

Apply Detail Reports Hierarchically

When this option is enabled, the detail report doesn't just run for the direct descendants of the selected object, it also runs for all indirect descendants, meaning the entire hierarchy.

Example:

Suppose you select a portfolio containing one direct project and a sub-portfolio with additional projects.

- **Without this option:** The detail report only runs for the direct project.
- **With this option:** The detail report runs for all projects, including those in the sub-portfolio.

Selecting the Summary and Detail Report

You can use either simple reports or document reports as the summary or detail report. The summary report is optional; the detail report is required.

Questions for Reflection

Use the following questions to regularly review your reports and refine them as needed:

- Do the reports deliver the information that's actually needed?
- Are there reports that aren't being used?
- Is any data currently being reported outside of Planforge, even though it's available within Planforge?
- Are the permissions still appropriate? Do the right people have access?

PRACTICAL EXAMPLE

Simple Tabular Report

In this section, we'll walk you through creating a simple tabular report step by step.

The finished report is available for download [here](#) as part of a ZIP file.

REQUIREMENTS

For this example, we'll assume the following scenario:

- Our company consists of several different divisions, each of which runs its own project work.
- With a large number of projects — around 20 running at once in our example — it's hard to keep track of everything.
- Management needs information on all projects across all divisions.
- The heads of each division only need information on the projects within their own division.

The report should include the following information:

- Project name
- Project manager

- Customer
- Project end date
- Overall project status
- Project progress
- Current pipeline stage
- Risk classification
- Total planned effort

The report should **not** include:

- Completed projects
- Archived projects

APPLYING TIPS FROM THIS GUIDE

- **Use pre-built reports as a template for your own.**

There's already a pre-built Project List report that covers some of our requirements, and we could use it as a starting point. In this example, however, we'll build the report from scratch so it's easier to follow the reasoning behind each setting.

- **What do I want to see in the report? What information do I need? Who is the report's audience?**

We've already defined the information we need above. The audiences are management and the division heads.

- **User input increases flexibility.**

Since both audiences need to see different sets of projects, user input is a natural fit. That way, the same report can serve both audiences without having to build separate reports.

- **Don't forget permissions.**

Permissions will be restricted to these two audiences, so only they can view and run the report.

CREATING THE REPORT

We can now start creating the report.

1. In the **navigation pane on the left**, select the **Reports** folder.
2. Click **New > Simple Report**.

STEP 1 — NAME & TYPE

Field	Value	Explanation
Title / Name	Open Projects with Key Figures	We choose a descriptive name so other users can immediately tell the report's purpose and content.
Description	This report shows open, non-archived projects with key project data and figures.	The description explains the report's purpose and helps other users find the right report.
Report Type	Projects with Pipeline Stages	The report type follows from the information we defined in our requirements. In Planforge, this information is stored in fields that describe business objects. Following the explanations earlier in this guide, we ask ourselves: Which business object should be my anchor point, and from what perspective do I want to retrieve the information I need?

		In our case, the primary business object is the project. All the information we need is associated with projects and we want to view it from exactly that perspective.
Template	Default	Planforge lets you import your own report templates, which you can use to change typographic details such as the font, for example. This is a more advanced aspect of report design, so we'll use the default template.
Layout	Tabular	Let's check our requirements against the available layouts: ■ We want to display information from multiple fields. These fields have different data types (text, date, percentage, image), which rules out <i>Matrix</i>, <i>Chart</i>, <i>Image</i> and <i>Textfield</i> – each of these only handles a single field or data type. ■ That leaves Tabular and Description. ○ <i>Description</i> doesn't allow grouping, sorting, or aggregation.

		○ Our requirements specifically call for clarity, since there are many projects involved — grouping and sorting in particular would be useful here. <i>Tabular</i> is therefore the right choice.
Output Format	A4	Output format and orientation should be considered together. What matters most is how much space is needed to display the desired information.
Orientation	Landscape	In our case, the report will display a 9-column table with roughly 20 rows (based on the number of fields in our requirements and the number of projects) when all portfolios of the company are queried. Accordingly, we mainly need space in terms of width. A4 in landscape orientation should offer enough space overall, since the values in the various fields won't be particularly long. We can also always adjust these values later.

STEP 2 — FIELDS

Now we'll map the requirements we defined earlier to the corresponding fields in Planforge.

Requirement	Field	Explanation
Project name	<i>Project Node.Name</i>	<i>Project Node</i> is the business object that corresponds to projects. The project name is found there.
Project manager	<i>Project Node.Project Manager.Full Name</i>	This field returns the project manager's first and last name. Alternatively, you could also use the field <i>.Name</i> .
Customer	<i>Project Node.Customer.Name</i>	Customers are their own business object in the database, which we can access via <i>Project Node</i> here.
Project end date	<i>Project Node.End</i>	The end date is stored directly in the <i>Project Node</i> business object.
Overall project status	<i>Project Node.Status (Image)</i>	We want to display a status indicator color; the alternative field, <i>Project Node.Status</i> , would only return a numeric value.

Project progress	<i>Plan.Complete</i>	This value isn't stored directly in the project, but in the project plan, which is its own business object.
Current pipeline stage	<i>Pipeline Stage.Name</i>	Like the project plan, the pipeline stage is also its own business object.
Risk classification	<i>Project Node.Risk Classification</i>	The risk classification is stored directly in the <i>Project Node</i> business object.
Planned effort	<i>Plan.Latest Version.Base Effort</i>	Again, we need to go through the business object <i>Plan</i> to get to the value for the planned effort. However, we also go through Latest Version here, as this gets us the most current value – after all, the planned effort can change fairly often.

STEP 3 — COLUMNS

In this step, we configure how each column is displayed.

Field	Value(s)	Explanation
Title	Descriptive column titles	The column titles are already pre-filled with default values. We adjust them as needed so they're clear and easy to understand.
Detail	<i>Project Node.End</i> : Default value (exact date) <i>Project Node.Risk Classification</i> : Text <i>Plan.Latest Version.Base Effort</i> : Hours	For the risk classification, we choose to display it as text rather than a numeric value, which makes the table easier to read.
Format	<i>Plan.Complete</i> : Rounded	For project progress and planned effort, we choose a rounded display, since decimal places are largely irrelevant here.

	<i>Plan.Latest Version.Base Effort:</i> Rounded	
Aggregation	<i>Plan.Latest Version.Base Effort:</i> Sum	With this aggregation, we sum up the planned effort values from the queried projects.

STEP 4 — GROUPING & SORTING

In this step, we define how the table rows are grouped and sorted within each group.

Grouping

The projects in our company are organized into portfolios by division and within those divisions into customer and internal projects. It makes sense to reflect this structure in the report, both to improve clarity and to make it easier to compare across divisions.

We set *Grouping 1* to *Portfolio.Name*.

Sorting

Within each group, we sort the projects by project progress.

We set Sort 1 to *Plan.Complete*.

STEP 5 — QUERY & INPUT

Here we can further filter the database query results to remove unnecessary information from the report. We can also use input here to make the report more flexible. Both are needed to meet our requirements.

Queries

Our requirements state that completed and archived projects shouldn't be shown. To achieve this, we define the following query conditions:

Field	Value	Explanation
Field	<i>Project Node.is Completed</i> <i>Project Node.Archived</i>	These fields indicate whether a project is completed or archived.

Detail	<empty>	Here, we could switch the field values from <i>true</i> and <i>false</i> to 1 and 0, in which case we would need to use those as the comparison values instead.
Operator	<i>equal</i>	The query condition checks whether the field value matches a specific comparison value, so <i>equal</i> is the right operator here.
Value	<i>false</i>	As the comparison value, we use <i>false</i> , since we only want to include projects that are neither completed nor archived.
Input / Field Title	Disabled	If this field were enabled, users would need to make a corresponding selection every time before running the report.

Input

Our requirements define two audiences: management, who want to see all projects, and division heads, who are only interested in the projects within their own division. So that both can use the report effectively — and so it stays flexible for different user groups — we'll configure an input field that lets users choose which projects the report should cover.

Field	Value	Explanation
Field	<i>Project Node.Project Node</i>	This field allows you to select either individual projects or entire portfolios.
Detail	<empty>	No value required.
Operator	<i>in</i>	The <i>in</i> operator allows you to select multiple projects or portfolios.
Value	<inactive>	No fixed value can be entered in this field.
Input	Enabled	Enables user input for this field.

Field Title	<i>Select project(s)/portfolio(s)</i>	The input field's title should make it clear what users need to select here.
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STEP 6 — PERMISSIONS

According to our requirements, only management and the division heads should be able to access the report. So we'll add their roles to the report's permissions and remove any roles that shouldn't have access.

CONCLUSION

With that, the report is fully configured. Run it and check that the display, filtering, and permissions all match the requirements we defined. The screenshot below shows a report querying a single division's projects, output in PDF format.

Open projects with key figures



Select project(s)/portfolio(s): Digital Solutions Division

Project	Manager	Customer	Finish (Plan)	% Com.	Stage	Risk classification	Status	Effort (Plan)
Customer projects								
Project Anvil	Melinda Wright	Vantera GmbH	2/19/27	0.00 %	PLANNING	Medium		836.00 h
Connect2026	Melinda Wright	Northcom	10/19/26	48.28 %	EXECUTION	High		696.00 h
Customer projects (Total)								1,532.00 h
Internal projects								
Database update	Gerald Schmidt		12/11/26	5.12 %	EXECUTION	Low		469.00 h
Website redesign	Michael Stone		8/31/26	74.21 %	EXECUTION	Medium		145.00 h
Cloud infrastructure migration	Melinda Wright		8/31/26	91.07 %	EXECUTION	Medium		28.00 h
Internal projects (Total)								642.00 h
Grand Total								2,174.00 h

PRACTICAL EXAMPLE

Simple Matrix Report

In this section, we'll walk you through creating a simple matrix report.

The finished report is available for download [here](#) as part of a ZIP file.

REQUIREMENTS

For this example, we'll assume the following scenario:

- Project managers and resource managers need information on resource utilization for resource planning.
- This requires the resources' planned effort data.
- Only data from the current project plan version is required.

The report should include the following information:

- Planned effort data for resources
- Breakdown by project
- Breakdown by month

- Breakdown by a specific time period

The report should **not** include:

- Effort data from completed projects
- Effort data from archived projects

APPLYING TIPS FROM THIS GUIDE

- **Use pre-built reports as a template for your own.**
For this example, there's no pre-built report that meets our requirements.
- **What do I want to see in the report? What information do I need? Who is the report's audience?**
We need the resources' planned effort data, broken down by project and month. The audience is project and resource managers.
- **User input increases flexibility.**
Resource planning requires effort data from all projects, so no input field is needed for that. However, it does make sense to allow filtering by specific teams and by time period.
- **Don't forget permissions.**
We'll restrict permissions to these two audiences, so only they can view and run the report.

CREATING THE REPORT

We can now start creating the report:

1. In the navigation pane on the left, select the **Reports** folder.
2. Click **New > Simple Report**.

STEP 1 — NAME & TYPE

Field	Value	Explanation
Title / Name	Current resource utilization	We choose descriptive values here so others can easily tell what the report does.
Description	This report shows planned effort per resource, broken down by project and month. Completed and archived projects aren't included.	

Report Type	Latest Activity Versions with Resources	The report type follows from the information we defined in our requirements. In Planforge, this information is stored in fields that describe a business object. We ask ourselves which business object we need information from. We're interested in the planned effort data, which is fundamentally stored in the business object <i>Activity</i>. The candidate report types would therefore be <i>All Activity Versions with Resources</i> and <i>Latest Activity Versions with Resources</i>. We're interested in the planned effort values of the current project plan version, so <i>All Activity Versions with Resources</i> isn't ideal for us. This report type retrieves activities from <i>all</i> plan versions, and we would then have to further restrict them via a query to the <i>latest</i> plan version. The report type <i>Latest Activity Versions with Resources</i> already has this filtering built in implicitly, so it's the better choice.
Template	Default	Planforge lets you import your own report templates, which you can use to change typographic details such as the font, for example.

		This is a more advanced aspect of report design, so we'll use the default template.
Layout	Matrix	Let's check our requirements against the available layouts: ■ We want to display information from a single field (planned effort). The data in this field is all the same type – numeric. This rules out <i>Chart</i> and <i>Image</i>. ■ We also want to break the data down by resource, project, and month – meaning we want to group, aggregate, and possibly sort it. That leaves only <i>Tabular</i> and <i>Matrix</i>. ■ The Matrix layout is built around information from a single field, which is then grouped, aggregated, and sorted by other fields – both by column and by row. This matches our requirements exactly, so we'll go with this layout.
Output Format	A3	Here we need to think about how much space displaying the desired information will take up. It makes sense to consider both fields together.
Orientation	Landscape	

		Effort data for multiple months and multiple resources will be quite extensive. Given the expected size of the table, we'll start with A3 in landscape orientation as our baseline. These settings can always be adjusted later.
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STEP 2 — MATRIX

For matrix reports, this step defines both the main field and the grouping, sorting, and aggregation of the columns.

Let's first look at what information our report should contain:

- Planned effort
- Date of the planned effort
- Resource the planned effort is assigned to
- Project the planned effort belongs to

Planned effort is our main field. It contains the values we want to break down by the other information.

This breakdown happens through groupings at the column and row level. In this step, we configure the column grouping; the row grouping follows in the next step.

The configuration therefore looks like this:

Field	Value	Explanation
Field	<i>Activity Version.Effort Partition.Entries.Planned Value.Effort</i>	This field gives us the value for the planned effort. We go through Activity Version here, since it already implicitly restricts to the <i>latest activity version</i> , and according to our requirements, we only need its planned effort.
Title	Planned effort	We give the column a descriptive title.
Detail	Hours	Here we choose the unit in which the planned effort should be displayed. Choose the unit your organization typically uses for this kind of data, unless the report has different requirements.
Format	Rounded	Here we set the desired level of detail for the display. For effort in hours, <i>Rounded</i> makes the most sense.

Aggregation	Sum	Here we set how the data from the field (i.e., the planned effort values) should be aggregated. In our example, we want to see the summed planned effort in the report. So we choose <i>Sum</i>.
Group by	<i>Activity Version.Effort Partition.Entries.Date</i> Grouping detail: Year and Month	Here we group the planned effort by the date of the effort value. We don't need to go all the way down to ...<i>Planned Value.Effort</i>, which also has a date field — the date at the level above is enough. Planned effort data is generally stored monthly in the database, so this is a sensible grouping. We also include the year as we will be querying projects that take place over more than one year.
Sort by	<i>Activity Version.Effort Partition.Entries.Date</i>	We want to sort by date, so we use the same field as for the grouping.

STEP 3 — GROUPING & SORTING

Here we configure the grouping and sorting of the rows.

Grouping

Here we bring the two remaining fields, resource and project, into the table. We group first by resource, then by project. This lets report readers immediately see which resources are assigned to which projects, with what planned effort per month.

We set *Grouping 1* to *Activity Version.Effort Partition.Resource.Display Name*.

We set *Grouping 2* to *Project Node.Display Name*.

Sorting

An additional sort isn't necessary for our use case. The groupings are already sorted alphabetically, which is sufficient for our requirements.

STEP 4 — QUERY & INPUT

Here we can further filter the database query results to remove unnecessary information from the report. We can also use input to make the report more flexible. Both make sense for our scenario.

Queries

Our requirements state that completed and archived projects shouldn't be shown.

We also need to account for aggregation: the field we're using returns planned effort values for all activities, including collection activities. For example, if two activities each have a planned effort of 20 hours, their collection activity already contains the correctly aggregated value of 40 hours. If we aggregated all activities together, we'd end up with an incorrect total of 80 hours.

To avoid this, we restrict the dataset to top-level activities. These are the collection activities, which already contain the correctly summed values of all their subordinate activities.

We therefore define the following query conditions:

Queries 1 & 2 — Exclude Archived and Completed Projects

Field	Value	Explanation
Field	Project Node.Is Completed Project Node.Archived	These fields indicate whether a project is completed or archived.
Detail	<empty>	Here, we could switch the field values from <i>true</i> and <i>false</i> to 1 and 0, in which case we would need to use those values as the comparison values as well.
Operator	<i>equal</i>	The query condition checks whether the field value matches a specific comparison value. So <i>equal</i> is the right operator here.
Value	<i>false</i>	As the comparison value, we use <i>false</i> , since we only want to include projects that are <i>neither</i> completed <i>nor</i> archived.

Input/Field Title	Disabled	If this field were enabled, users would need to make a corresponding selection every time before running the report.
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Query 3 – Return Only Top-Level Activities

Field	Value	Explanation
Field	<i>Activity Version.Outline Level</i>	The field <i>Outline Level</i> indicates which level an activity is on within the project structure.
Detail	<empty>	No value required.
Operator	<i>equal</i>	The query condition checks whether the field value matches a specific comparison value. So <i>equal</i> is the right operator here.
Value	0	Here we enter the comparison value. Top-level activities are on <i>Outline Level 0</i> , so that's our comparison value.

Input/Field Title	Disabled	If this field were enabled, users would need to make a corresponding selection every time before running the report.
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Inputs

Our requirements state that it should be possible to limit the time period for the planned effort values. We implement this using two input queries.

We also create an additional input query that lets users select which teams or resources the effort values should be shown for.

Inputs 1 & 2 — Select Time Period

Field	Value	Explanation
Field	<i>Activity Version.Effort Partition.Entries.Date</i>	Both inputs use the same field: the date of the planned effort.
Detail	<i>Year and Month</i>	Here we can define how precisely the time period should be specified. It makes sense to use the same setting as for the date grouping we specified in the <i>Matrix</i> step, so <i>Year and Month</i> .
Operator	<i>greater equal</i> <i>less equal</i>	For Input 1, we use the operator <i>greater equal</i> , and for Input 2, the operator <i>less equal</i> .
Value	<inactive>	No value is entered here.
Input	Enabled	Enables user input for this field.

Field Title	From Until	Input 1 has the title <i>From</i> , and Input 2 has the title <i>Until</i> . Together with the selection fields, this makes it clear that a time period should be selected.
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Input 3 – Resource/Team Selection

Field	Value	Explanation
Field	<i>Activity Version.Effort Partition.Resource.Resource</i>	This input refers to the resource assigned to an activity. We access the resource node via the activity's planned effort data (<i>Resource.Resource</i>).
Detail	<empty>	No value is required here.
Operator	<i>in</i>	The <i>in</i> operator allows you to select multiple resources or teams.
Value	<inactive>	No value is entered here.
Input	Enabled	Enables user input for this field.

Field Title	<i>Select Resources/Teams</i>	The input field's title should make it clear what needs to be selected.
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STEP 5 — PERMISSIONS

According to our requirements, only project and resource managers should be able to access the report. So we'll add their roles to the report's permissions and remove any roles that shouldn't have access.

CONCLUSION

With that, the matrix report is fully built. Run it and check that the results match your requirements. You can adjust the configuration at any time if needed.

Latest planned effort values



From: January, 2026
Select resources/teams: Teams

Until: December, 2027

		February, 2026	March, 2026	April, 2026	May, 2026	June, 2026	July, 2026	August, 2026	September, 2026	October, 2026	November, 2026	December, 2026	January, 2027	February, 2027	Total
ChangW	Connect2026	0.00 h	0.00 h	0.00 h	8.00 h	0.00 h	0.00 h	20.00 h	10.00 h	8.00 h	0.00 h	0.00 h	0.00 h	0.00 h	46.00 h
	PM handbook	0.00 h	0.00 h	0.00 h	4.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	4.00 h
	Project Anvil	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	8.00 h	0.00 h	0.00 h	22.00 h	8.00 h	8.00 h	46.00 h
	Website USA	20.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	20.00 h
		20.00 h	0.00 h	0.00 h	12.00 h	0.00 h	0.00 h	20.00 h	18.00 h	8.00 h	0.00 h	22.00 h	8.00 h	8.00 h	116.00 h
CristinaM	Connect2026	0.00 h	0.00 h	0.00 h	28.00 h	0.00 h	0.00 h	13.33 h	26.67 h	8.00 h	0.00 h	0.00 h	0.00 h	0.00 h	76.00 h
	PM handbook	0.00 h	0.00 h	0.00 h	5.00 h	6.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	11.00 h
	Project Anvil	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	28.00 h	0.00 h	0.00 h	13.33 h	25.33 h	9.33 h	76.00 h
		0.00 h	0.00 h	0.00 h	33.00 h	6.00 h	0.00 h	13.33 h	54.67 h	8.00 h	0.00 h	13.33 h	25.33 h	9.33 h	163.00 h
EricP	Connect2026	0.00 h	0.00 h	0.00 h	20.50 h	55.00 h	7.50 h	13.33 h	26.67 h	8.00 h	0.00 h	0.00 h	0.00 h	0.00 h	131.00 h
	Database Update	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	22.27 h	78.22 h	31.11 h	41.60 h	6.40 h	0.00 h	0.00 h	179.60 h
	Project Anvil	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	28.00 h	55.00 h	0.00 h	13.33 h	25.33 h	9.33 h	131.00 h
		0.00 h	0.00 h	0.00 h	20.50 h	55.00 h	7.50 h	35.60 h	132.89 h	94.11 h	41.60 h	19.73 h	25.33 h	9.33 h	441.60 h
GeraldS	Connect2026	0.00 h	0.00 h	0.00 h	31.25 h	102.31 h	56.96 h	45.16 h	47.31 h	8.00 h	0.00 h	0.00 h	0.00 h	0.00 h	291.00 h
	Database Update	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	21.23 h	34.99 h	30.99 h	31.18 h	9.22 h	0.00 h	0.00 h	127.60 h
	Project Anvil	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	57.03 h	125.97 h	67.74 h	70.97 h	61.29 h	8.00 h	391.00 h
		0.00 h	0.00 h	0.00 h	31.25 h	102.31 h	56.96 h	66.40 h	139.33 h	164.95 h	98.92 h	80.18 h	61.29 h	8.00 h	809.60 h
MelindaW	Connect2026	0.00 h	0.00 h	0.00 h	28.00 h	0.00 h	31.67 h	18.33 h	0.00 h	8.00 h	0.00 h	0.00 h	0.00 h	0.00 h	86.00 h
	PM handbook	0.00 h	0.00 h	0.00 h	3.00 h	0.00 h	2.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	5.00 h
	Project Anvil	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	28.00 h	0.00 h	31.67 h	18.33 h	0.00 h	8.00 h	86.00 h
	Website USA	5.00 h	5.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	10.00 h
		5.00 h	5.00 h	0.00 h	31.00 h	0.00 h	33.67 h	18.33 h	28.00 h	8.00 h	31.67 h	18.33 h	0.00 h	8.00 h	187.00 h
MichaelS	Connect2026	0.00 h	0.00 h	0.00 h	8.00 h	0.00 h	31.67 h	18.33 h	0.00 h	8.00 h	0.00 h	0.00 h	0.00 h	0.00 h	66.00 h
	PM handbook	0.00 h	0.00 h	0.00 h	2.00 h	6.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	8.00 h
	Project Anvil	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	8.00 h	0.00 h	31.67 h	18.33 h	0.00 h	8.00 h	66.00 h
	Website USA	20.00 h	20.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	40.00 h
		20.00 h	20.00 h	0.00 h	10.00 h	6.00 h	31.67 h	18.33 h	8.00 h	8.00 h	31.67 h	18.33 h	0.00 h	8.00 h	180.00 h
SonjaW	Database Update	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	21.80 h	88.00 h	48.00 h	0.80 h	3.20 h	0.00 h	0.00 h	161.80 h
		0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	21.80 h	88.00 h	48.00 h	0.80 h	3.20 h	0.00 h	0.00 h	161.80 h
Total		45.00 h	25.00 h	0.00 h	137.75 h	169.31 h	129.80 h	193.80 h	468.89 h	339.06 h	204.65 h	175.12 h	119.96 h	50.67 h	2,059.00 h

PRACTICAL EXAMPLE

Simple Chart Report

In this section, we'll walk you through creating a simple chart report.

This example is intentionally kept more compact, since chart reports offer fewer configuration options, and general aspects have already been explained in detail in the tabular and matrix report examples.

The finished report is available for download [here](#) as part of a ZIP file.

REQUIREMENTS

For this example, we'll assume the following scenario:

- Project managers need a report that lets them output the Gantt chart of a project's current project plan version.
- The specific project should be selectable.

CREATING THE REPORT

1. In the navigation pane on the left, select the **Reports** folder.
2. Click **New > Simple Report**.

STEP 1 — NAME & TYPE

Field	Value	Explanation
Report Type	Projects with Pipeline Stages	The report type follows from the information defined in our requirements. Gantt charts are part of projects, so we need a report type that can query projects. <i>Projects with Pipeline Stages</i> meets this requirement.
Layout	Chart	Since we want to output the Gantt chart, only the <i>Chart</i> layout is an option here.
Output Format	A4	

Orientation	Landscape	Gantt charts are typically very wide, so A4 combined with landscape orientation should suit this example. The output format can be adjusted later if needed.
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STEP 2 — FIELD

Here we select the chart and define additional parameters.

Chart

Field	Value	Explanation
Chart	Gantt	Here we can choose from the various available charts. For this example, we need the Gantt chart.
Field	<i>OpProjectPlan.LatestVersion</i>	Here we can select which project plan version should be displayed. For this example, we use the current project plan version.

Parameters

Here you can define various parameters for the chart view. For this example, we'll set all parameters to user input, so project managers can choose the settings that work best for them.

The **Time Unit** defines how the timeline is broken down in the Gantt chart. Try out different settings to find the display that works best for your project — shorter projects are often easier to read when shown in days.

Start and **End** limit the time period shown in the Gantt chart. Activities outside the selected period are still included, but the corresponding time segments are grayed out in the chart.

STEP 3 — QUERY & INPUT

For this example, a single input query that lets you select a project is enough.

Field	Value	Explanation
Field	<i>Project Node.Project Node</i>	This field allows you to select a project.
Operator	<i>equal</i>	The <i>equal</i> operator restricts the selection to a single project.
Input	Enabled	Enables user input for this field.
Field Title	<i>Select project</i>	A descriptive title for the input field.

CONCLUSION

With that, the chart report is fully configured. Run it and check that the Gantt chart of the current project plan version is displayed as expected for the selected project.

Gantt for latest plan version



Select project: Connect2026

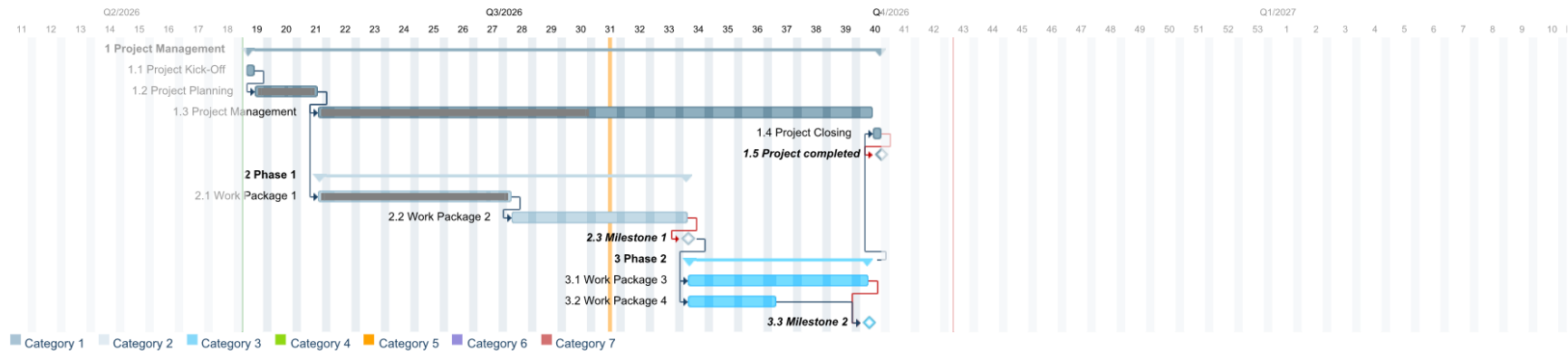
View Type: Simple

Finish: 12/31/26

Start: 1/1/26

Time Unit: Weeks

Gantt for latest plan version



PRACTICAL EXAMPLE

Simple Description Report

In this section, we'll walk you through creating a simple description report.

This example report matches the tabular report example in most key aspects – particularly the report type and the fields selected. This illustrates how different layouts can present the same information differently, and so serve different requirements.

Since this overlaps heavily with the tabular example, we'll keep the explanations in this section shorter.

The finished report is available for download [here](#) as part of a ZIP file.

REQUIREMENTS

For this example, we'll assume the following scenario:

- A report is needed that presents a project's general information in a compact, form-like layout.
- This report should also serve as the introduction for a document report whose second report shows the project progress bars with variance. This is a classic use case for the Description layout.

The report should include the following information:

- Project name
- Project manager
- Customer
- Project end date
- Overall project status
- Project progress
- Current pipeline stage
- Risk classification

CREATING THE REPORT

1. In the navigation pane on the left, select the **Reports** folder.
2. Click **New > Simple Report**.

STEP 1 — NAME & TYPE

Field	Value	Explanation
Report Type	Projects with Pipeline Stages	Same as in the tabular report – we need information about projects.
Layout	Description	Let's check our requirements against the available layouts: ■ We want to display information from multiple fields. These fields have different data types (text, date, percentage, and image), which rules out <i>Matrix</i>, <i>Chart</i>, <i>Image</i>, and <i>Textfield</i> – each of these only handles a single field or data type. ■ That leaves <i>Tabular</i> and <i>Description</i>. ○ We want to output the information for a single project at a time, not a list of projects.

		○ The information should be displayed in a form-like layout. ○ The report should serve as the introduction within a document report. ○ No grouping, sorting, or aggregation is needed. ○ <i>Description</i> is therefore the right choice here. Tabular, on the other hand, is better suited to displaying multiple projects in a list with grouping, sorting, and aggregation.
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STEP 2 — FIELDS

Requirement	Field
Project name	<i>Project Node.Name</i>
Project manager	<i>Project Node.Project Manager.Full Name</i>
Customer	<i>Project Node.Customer.Name</i>

Project end date	<i>Project Node.End</i>
Overall project status	<i>Project Node.Status (Image)</i>
Project progress	<i>Plan.Complete</i>
Current pipeline stage	<i>Pipeline Stage.Name</i>
Risk classification	<i>Project Node.Risk Classification</i>

STEP 3 — COLUMNS

Field	Value	Explanation
Detail	<i>Project Node.End</i> : Default value (exact date)	For the risk classification, we change the display from a number to a text value. This makes the report easier to read.

	<i>Project Node.Risk Classification:</i> Text	
Format	<i>Plan.Complete:</i> Rounded	For project progress, we choose a rounded display, since decimal places aren't relevant here.

STEP 4 — QUERY & INPUT

For this example, we don't need a fixed query.

Input

We define an input query that lets you select a specific project.

Field	Value	Explanation
Field	<i>Project Node.Project Node</i>	This field allows you to select a project.
Operator	<i>equal</i>	The <i>equal</i> operator allows you to select a specific project.

Input	Enabled	Enables user input for this field.
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CONCLUSION

With that, the description report is fully configured. Run it and check that the project information is displayed clearly, and that you can select the desired project via the input field.

Project data overview



Select project: Connect2026

Name Connect2026

Customer Northcom

Status ● ● ●

Phase EXECUTION

Manager Melinda Wright

Finish (Plan) 10/19/26

% Com. 48 %

Risk classification High

PRACTICAL EXAMPLE

Document Report

In this section, we'll walk you through creating a document report.

REQUIREMENTS

For this example, we'll assume the following scenario:

- Management needs a report that shows both the most important project data and the project progress bars with variance.

SELECTING THE REPORTS

Our requirements show that we need to combine two different reports, since the desired information can't be adequately displayed in a single report. A document report made up of two simple reports is therefore the right solution.

We've already built the **first report** containing the key project data earlier in this guide. It's the [simple description report](#), which presents the project data in a form-like layout and was designed to serve as the introduction for a document report.

For the **second report**, which contains the progress bars with variance, we use the report *Project Progress with Variance*.

Both reports are available for download as part of a ZIP file [here](#).

CREATING THE REPORT

1. In the navigation pane on the left, select the **Reports** folder.
2. Click **New > Document Report**.

STEP 1 — NAME & TYPE

Field	Value	Explanation
Title / Name	Project data with progress bars	We choose a descriptive name so the report's purpose is easy to recognize.
Description	This document report presents key project data (manager, customer, risk classification, end date, status, pipeline, etc.) as	

	well as progress as a bar chart with variance.	
Header	Same as Title / Name	Appears as the topmost heading in the document.
Sub- header/2nd/3rd Subheader	<empty>	These appear below the header, in order. Not needed for our report, but can be useful for more complex document reports, for example.
Business Object	Project	Here we select the business object that the input queries of all included simple reports must target. Simple reports with input queries on different business objects can't be combined. In our case, <i>Project</i> is the right business object, since both simple reports have input queries on <i>Project Node.Project Node</i>.
Object Title	Select project	The label for the document report's input query. Document reports always have a single input query that's applied to all included simple reports.

Automatic Numbering	Enabled	Numbers the headings of the individual simple reports sequentially.
Show in Context- Sensitive Report Menus	Disabled	This option makes the report appear directly in the context menu of the corresponding business object (in our case, under <i>Project Properties</i> > <i>Download Report</i>). It isn't needed for this example.
Report Title/ Report Description/ Section Title	Project data overview Project progress with variance	Here we add the simple reports we selected earlier and adjust their headings.
Template	Default	Planforge lets you import your own report templates, which you can use to adjust typographic details such as the font, for example. This is a more advanced aspect of report design, so for this example we'll use the default template.
Output Format	A4	

Orientation	Landscape	For document reports, it's a good idea to align the output format and orientation with the included simple reports. For this example, we use A4 in landscape orientation.
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STEP 2 — PERMISSIONS

According to our requirements, only management should be able to access the report. So we'll add their roles to the report's permissions and remove any roles that shouldn't have access.

CONCLUSION

With that, the document report is fully configured. Run it and check that the project data and project progress bars are displayed together in a single document as intended.

Project data with progress bars



1. Project data overview

Name	Connect2026	Manager	Melinda Wright
Customer	Northcom	Finish (Plan)	10/19/26
Status		% Com.	48 %
Phase	EXECUTION	Risk classification	High

2. Project progress with deviations

Effort		48%	Variance		1%
Costs		11%	Variance		0%
Dates		58%	Variance		9%



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