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The Importance of Reporting Functionality in Integrated Project Management Systems

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1) Reporting Flexibility and User Acceptance:

Many integrated job costing and accounting systems in use in the creative industry offer great value to the organisation by streamlining the project management from recording the first client brief, generating budgets and quotes right through to closing the job bag and handling the billing. There is however one aspect in many such systems, that is often underestimated by the software authors. It is the user control over the creation of reports. Whilst all systems around provide standard reports such as profitability reports or job bag reports on the project management side and aged debtors and creditors reports on the accounting side, it is the flexibility in generating one's own reports that makes the big difference in user acceptance or rejection of the system.

2) Technical Restrictions to the Reporting Flexibility:

All databases consist of tables holding information. Whilst it is relatively straightforward to create a report on one of those tables, e.g. creating a list of clients with their address and telephone number details based on the client table, it is the connection of tables that allows for more complex reports. An example for such a report would be a client profitability report: You start with the client table, connect a client to all the client's jobs in the job table and then connect every job to the job transaction table to get a list of all costs and income for those jobs for that client. Ideally you have the added ability to being able to have profit calculations and subtotalling as well.

The number of tables that can easily be linked for reporting is directly related to the strength of the database hosting those tables. Thus the user defined report building ability of the project management software has physical restrictions in particular when simpler stand alone data bases are used, but is greater in systems based on more powerful data bases such as e.g. SQL or Oracle. Whilst in simpler databases more complicated reports can be programmed in hard code by the software developers and are therefore not amendable by the end user, mightier databases give the user the flexibility to create their reports on an ad-hoc basis.

3) How to Resolve this Problem and Increase User Acceptance:

Although there are independent software solutions enabling users to access their integrated project management system and extract data for reporting purposes, these are seldom perceived to be user-friendly solutions and most certainly defy the objective of having an integrated system. Why entering all timesheets, estimates or third party costs in one system in the first place, if you then have to use a separate system - be it an easy Excel odbc query or something like crystal reporting - to get the reward of useful reports out of it.

This perceived lack of user friendliness on the project management site of the software is even more unfortunate as in many cases the finance department users are quite happy with the accounting reports produced by their software.

In many training courses for project managers attendees have quoted the lack of reporting

functionality as the biggest obstacle in end user acceptance of systems previously used. In those same seminars being able to show participants easy to use report writers as part of their new integrated system has proved to be the breaking point for them buying into a new integrated project management software. In the environment of an agency this ability of creating user-defined reports is even more influential as users operate powerful software systems to create fancy creative products for their customers all the time. It is difficult to comprehend why one is able to produce impressive creative end products often combining text, graphic and video in one system whilst at the same time in a system that has the "relatively easy task" to just handle numbers and figures it is not possible to make even minor changes to ready made reports.

Upgrading the database on top of which the project management software sits, might offer one, but not always the most feasible solution in particular for small and medium sized companies due to the extra costs and administration involved. Experience from running project management and reporting seminars shows that upgrading the project management software to one that has a better designed architecture of tables thus enhancing the flexibility even of a simple stand alone data base and giving users the ability to construct their reports in a drag and drop manner has proved to be the most cost effective solution for many agencies. If - in addition to that - the user knowledge of the data base structure and the report writing technique is built up, the organisation will soon benefit from an improved job reporting and along with that user acceptance.

© 2008 Volker Bendel - Volker Bendel is manager of the training department of Agency Software Worldwide, the producers of the "Paprika/Rebus" job costing software (<http://www.paprika-software.com>) - (<http://www.rebus-software.com>) Originally from a legal background, he has several years experience in planning and implementing Job Costing and Accounting Software Systems in the Creative Industry. He has also delivered training courses in the UK, Europe, Dubai, the US, China and Australia. Prior to that he worked as a senior business consultant in Hong Kong and as a department manager of a design department in Hong Kong.

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