

Article for MPA ezine – January 24, 2008
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Topic: Tasks by Week report

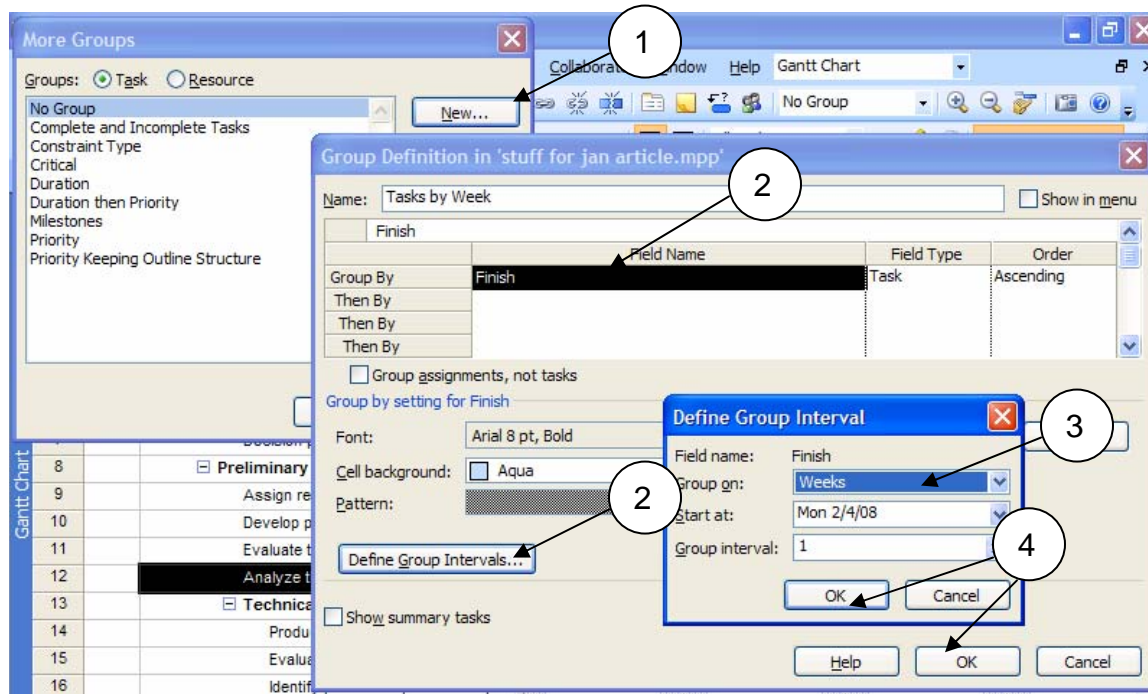
Question: What I would really like to see is a report that would show me all tasks that are due by week. When I use the date range filter, I am getting too many tasks. How could I create this report?

Answer: I like this question because it is something many users would like and have been looking for. There is a little used option in grouping called intervals that could help you with this request. Please see below for the steps and the result:

Create a group called “Tasks by Week”

1. Project → Group by → More Groups → New
2. Name: Tasks by Week, Group by: Finish, Select a color → Define Group Intervals
3. In the Define Group Interval form: Group on → Weeks, Group Interval 1 for every week
4. Click OK to close the Define Interval form, Click OK to close and save the Group Definition
5. To test: Click on the Task by Week Group → Click Apply

Another option: If you would like the tasks grouped by week by resource, add Resource Name as a secondary grouping next to “Then by”

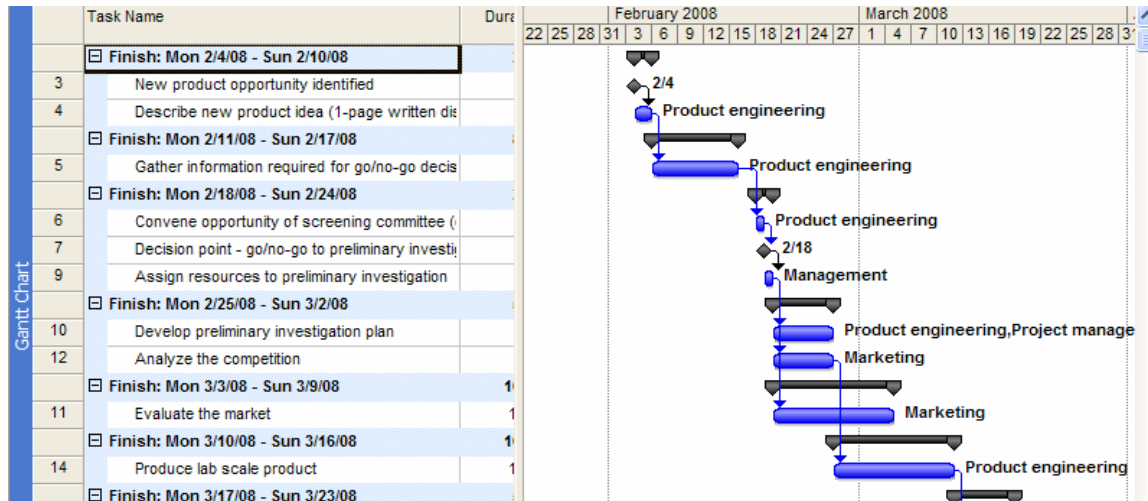


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Below is an example of the result. You can expand and contract each week to show the detail. Using the Show button on the formatting toolbar and selecting level 1 will expand and contract all the groups at once. This grouping may now be applied to any task report or view.



Using Define Group Interval opens up many options and possibilities for creative reporting. Define Interval is not available for all fields in the database. Try date field or a number field (ie: duration, priority, % complete, cost, etc) as well as custom fields including text fields among others. Resource grouping are also available.

NOTE: The group you created exists in the one project that it was created in. To allow the grouping to be available in other project schedules, copy the object through the organizer: Tools → Organizer → Groups → select the object on the right and copy it to the left.

Cool trick: If you are managing multiple projects, combine them using the New Window function and then apply this grouping. To make the information more clear, insert the column Project into the task table. You will now have a report of tasks per week with the name of the project on each task.