

Lehnert Computer Services

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Topic: Tasks by Department/Group report

Don M of Bozeman, MD asks: Our projects are performed by multiple departments within our organization. How can I get a Gantt Chart and task list per department?

Answer: It is a little known feature of the system that the Resource Group field in the Task tables is populated from the Resource Groups field on the Resource Sheet when an assignment is made to a task. If you insert the column "Resource Group" into any task table, you will see the values on tasks that contain assignments. This means that how you design the use of the Resource Grouping field could have an impact on the task reports you will be able to obtain.

Obtaining a report for a single resource group would best be accomplished using filters applied to a task table with or without a Gantt Chart view. Grouping is another possibility, but if you have multiple resources assigned from different groups, grouping will not separate the individual values. Filters have the ability to show individual group values. The easiest solution is to insert the Resource Group field into a task table, turn on the autofilter and then filter on the required group requested. Another option would be to create a filter that would allow you to select the group you would like at the time you executed the request. Another advantage of creating a filter is that it can be applied to reports as well as views. See below for both options.

Autofilter:

The screenshot shows a software interface with a Gantt chart and a task list. The task list has a 'Resource Group' column. A dropdown menu is open for the 'Resource Group' column, showing options like '(All)', '(Custom...)', 'Crew', 'Equipment', 'Expenses', 'Film and Lab', 'Production', and 'Talent'. A callout box points to the 'Autofilter' button in the toolbar, saying 'Click to turn on autofilter'. Another callout box points to the dropdown menu, saying 'Click on autofilter option and select group from list'.

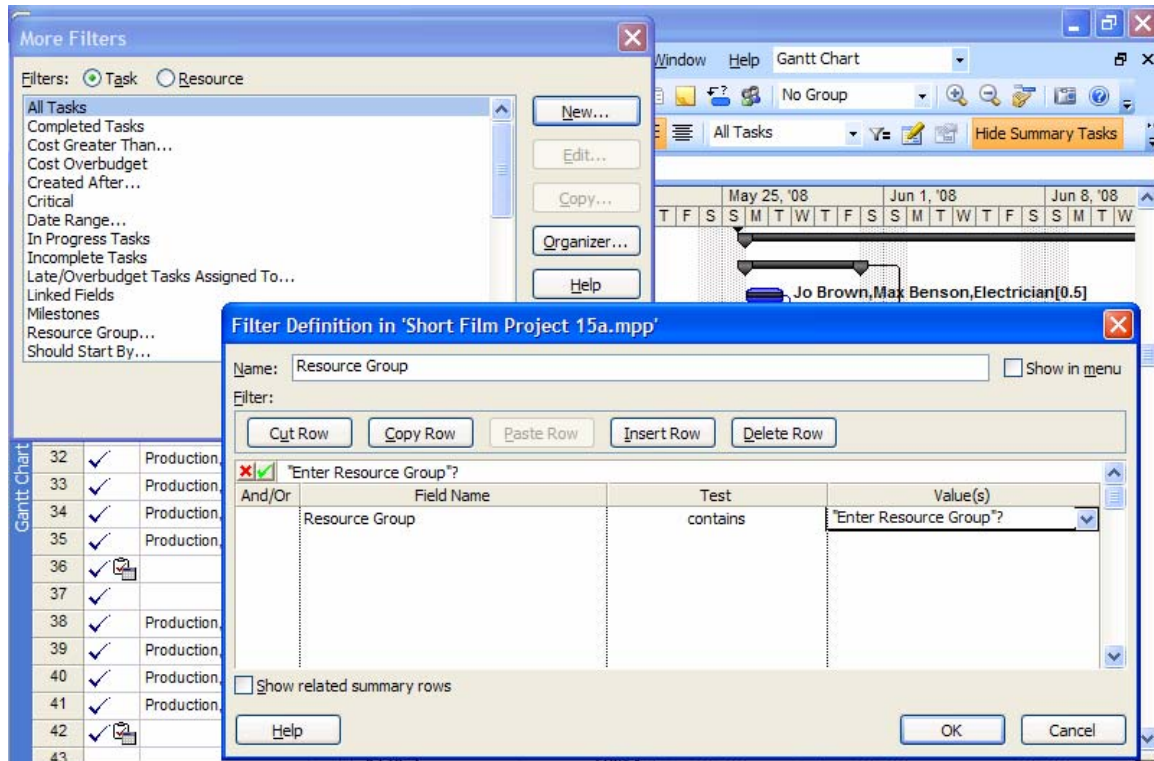
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Create a custom filter with an execution time selection option:

Tools → Filter → more filters → New

In the Filter definition form enter the values as shown on screen below:



Name: Resource group

Show in the menu: click to put in a check mark

Field Name: Resource Group

Test: Contains

Value: "Enter Resource Group"?

Click – OK

Project → Filters → Resource Group or select Resource Group from the filter selector on the formatting toolbar. The column Resource Group does not have to be in the table to run the filter. This filter may now be applied to reports as well as views.

Shortcut: F3 key will remove any filter