

Lehnert Computer Services

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Article for MPA ezine – April 4, 2008
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Subject: Export the task list to Excel and keep the WBS structure

Question: I would like to take the task list in MS Project and export it to Excel and keep the WBS structure. A cut and paste loses the WBS structure as well and the Export to Excel function. Is there a way to accomplish this?

Answer: Yes, this can be accomplished. The answer comes from Greg H. of Wheaton, IL which he presented at an MPA meeting years ago. This export can only be done on MS Project 2002 and MS Project 2003 versions of the product.

The first decision you have to make is what would you like to export. You can export any standard or custom tables or you can select individual fields to create your own export map. For the purpose of this example, we will export the task Entry table to Excel keeping the WBS format in tack. Here is an example of a direct export from MS Project to Excel.

	A	B	C	D	E
1	ID	Indicators	Task_Name	Duration	Start_Date
2	1		New Product Development Template	766 days	1/1/2004 8:00
3	2		Initial New Product Screening Stage	9 days	1/1/2004 8:00
4	3		New product opportunity identified	0 days	1/1/2004 8:00
5	4		Describe new product idea (1-page written dis	2 days	1/1/2004 8:00
6	5		Gather information required for go/no-go decis	6 days	1/5/2004 8:00
7	6		Convene opportunity of screening committee	1 day	1/13/2004 8:00
8	7		Decision point - go/no-go to preliminary invest	0 days	1/13/2004 17:00
9	8		Preliminary Investigation Stage	53 days	1/14/2004 8:00
10	9		Assign resources to preliminary investigation	1 day	1/14/2004 8:00
11	10		Develop preliminary investigation plan	5 days	1/15/2004 8:00
12	11		Evaluate the market	10 days	1/15/2004 8:00
13	12		Analyze the competition	5 days	1/15/2004 8:00
14	13		Technical Feasibility Analysis	20 days	1/22/2004 8:00
15	14		Produce lab scale product	10 days	1/22/2004 8:00
16	15		Evaluate internal product	5 days	2/5/2004 8:00
17	16		Identify production process steps required for	5 days	2/12/2004 8:00
18	17		Assess manufacturing capabilities	10 days	2/19/2004 8:00
19	18		Determine safety issues	10 days	2/19/2004 8:00
20	19		Determine environmental issues	10 days	2/19/2004 8:00
21	20		Review legal issues	10 days	2/19/2004 8:00
22	21		Perform financial evaluation	10 days	2/19/2004 8:00

1. Open the MS Project file
2. File → Save as → selection the location you wish to put the file, enter a filename;
Save as type is Web page (*.html, *.htm) → click on Save (the export wizard will start)
3. Next (to continue)
4. We will select a new map for this example → Next
5. Click on Tasks in the top area, make sure that Export Header row is selected in the bottom area, then click Next

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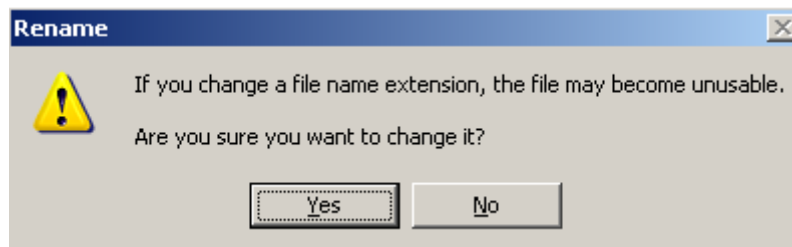
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6. For this example we will use the table Entry so click on the button "Base on Table" and select Entry → click OK to continue
7. Click Finish



8. You have created a .html file that looks like this
9. Right click on the file name in Windows Explorer and Rename the file by just changing the file ending to a .xls file. You will see this error message:



Click "yes" to make the change.

Results – see example below:

	A	B	C	D	E	F
7	Task_Table1					
8						
9	ID	Indicators	Task Name	Duration	Start Date	Finish Date
10	1		New Product Development Template	766 days	4/1/2008	3/8/2011
11	2		Initial New Product Screening Stage	9 days	4/1/2008	4/11/2008
12	3		New product opportunity identified	0 days	4/1/2008	4/1/2008
13	4		Describe new product idea (1-page written disclosure)	2 days	4/1/2008	4/2/2008
14	5		Gather information required for go/no-go decision	6 days	4/3/2008	4/10/2008
15	6		Convene opportunity of screening committee (decision to pursue idea or not)	1 day	4/11/2008	4/11/2008
16	7		Decision point - go/no-go to preliminary investigation	0 days	4/11/2008	4/11/2008
17	8		Preliminary Investigation Stage	53 days	4/14/2008	6/25/2008
18	9		Assign resources to preliminary investigation	1 day	4/14/2008	4/14/2008
19	10		Develop preliminary investigation plan	5 days	4/15/2008	4/21/2008
20	11		Evaluate the market	10 days	4/15/2008	4/28/2008
21	12		Analyze the competition	5 days	4/15/2008	4/21/2008
22	13		Technical Feasibility Analysis	20 days	4/22/2008	5/19/2008
23	14		Produce lab scale product	10 days	4/22/2008	5/5/2008

Give it a try!!!