Procedure for Updating Task Lists

This procedure lists the step needed to update the task lists for each election with data from the Project Schedule. (Note: this assumes you have a previous Excel file to work from. Here is a sample from Tompkins County. But even without that file, you can use the information below to get a general idea of how to generate task lists.)

- Open up the task list spreadsheet
- Delete all rows containing the previous data (rows 3 to the end)
- Edit the "header" to read the name of the specific election you are working on.
- Save the spreadsheet.
- Open up "Open Project schedule for the subject election
- In the menu bar, click on "view"
- Click on "Resource Usage" to get a listing of tasks by resource
- After the "Name" column, add 3 columns labeled "Task ID", "Start", and "Finish" (to add a column, put the cursor on the top of the column, right click, and click on "Insert Column", scroll down to the column name desired, and click on the name).
- Make sure the 4 columns are in order ("Name", "Task ID", "Start", and "Finish".
- Highlight all data in the four columns (highlight first cell, hold down shift key, and highlight last cell)
- From the menu bar, select "Edit", then click on "copy"
- Move to the spreadsheet and highlight cell B3
- select "Edit" from the menu bar, and click on paste.
- When the dialog box appears, select "Unicode" in field labeled "Character Set"
- With all the data pasted in, highlight each title, cut it, and paste it into Column A, one row below its original position
- When all titles are in row A, highlight the column and change the format to 12 pt, bold
- Sort each group by "finish date" (Column E) in ascending order
- Insert rows as required between groups so each group is on a separate page
- Save the spreadsheet
- Print out the results and distribute