

Create simple report activities

Activity 1: Create a simple task report

You want to track all of your active tasks in a single report. Create a Task report named “My Current Tasks” using the following:

- Columns (View) = Standard
- Groupings = Project
- Filter = My Current Tasks
- Description = Incomplete tasks on Current projects where I am the task owner, grouped by project.

Answer 1

1. Go to the **Main Menu** and select **Reports**.
2. Click the **New Report** drop-down menu and select **Task Report**.
3. In Columns (View), click the **Apply an Existing View** menu and select **Standard**.

New Task Report Report Settings ▾

Columns (View) Groupings Filters Chart

Select or add a new Column

- Project Outline
- Project Outline+
- Recent Activity
- Revenue
- Search Results
- Standard**
- Standard + Constraint
- Standard + Description

Column Preview Apply an Existing View ▾ [+ Add Column](#)

TASK NAME	ASSIGNMENTS	DURATION	PLN HRS	PREDECESSORS	START ON	DUE ON	% COMPLETE
Train Inside Sales Team		1234 Minutes	20.57 Hours	↳ 2 ↳ 3sf	8/18/20	8/20/20	75%

[Save + Close](#) [Apply](#) [Cancel](#)

4. In the **Groupings** tab, click the **Apply an Existing Grouping** menu and select **Project**.

New Task Report

Report Settings 

Columns (View) **Groupings** Filters Chart

Group your Report:

[Switch to Matrix Grouping](#) | [Switch to Text Mode](#)

First by:

Project » Name

[+ Add another Grouping](#)




Collapse this grouping by default 

- Planned Hours Alignment
- Priority
- Progress Status
- Project**
- Start Date By Week
- Status
- Tasks by Week by Project
- Team

Grouping Preview

[Apply an Existing Grouping](#) 

[+ Add Grouping](#)

TASK NAME	ASSIGNMENTS	DURATION	PLN HRS	PREDECESSORS	START ON	DUE ON	% COMPLETE
Project » Name 							
Train Inside Sales Team		1234 Minutes	20.57 Hours	 2  3sf	8/18/20	8/20/20	75%

[Save + Close](#)

[Apply](#)

[Cancel](#)

5. In the **Filters** tab, click the **Apply an Existing Filter** menu and select My Current Tasks.

New Task Report

[Report Settings](#) ▾

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report

Only show me Tasks in which the...

Switch to Text Mode | Apply an Existing Filter ▾

Task » Assigned To ID	Equal ▾	\$\$USER.ID
AND ▾		
Project » Status Equates With	Equal ▾	Current
AND ▾		
Task » Is Complete	Equal (Case Sensitive) ▾	<input type="radio"/> True <input checked="" type="radio"/> False ×

[+ Add another Filter Rule](#)

- Customer Guide
- Hours worked on tasks
- Incomplete Tasks
- Milestone Tasks
- My Current Tasks**
- My Late Tasks
- My Project Tasks
- My Tasks

[Save + Close](#)

[Apply](#)

[Cancel](#)

6. Open **Report Settings** and name the report “My Current Tasks.”
7. In the Description field, enter “Incomplete tasks on Current projects where I am the task owner, grouped by project.”

My Current Tasks

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report

Only show me Tasks in which the...

Task » Assigned To ID Equal

AND

Project » Status Equates With Equal

AND

Task » Is Complete Equal (Case Sensitive)

+ Add another Filter Rule

Report Options

Report Title

My Current Tasks

Description

Incomplete tasks on Current projects where I am the task owner, grouped by project.

Run this report with the Access Rights of:

Start typing name...

When the Report loads, show the:

Details Tab

When the report loads on a dashboard, show:

15 Items

Show this report in a Gantt view by default

Report Prompts

Done

Save + Close

Apply

Cancel

8. Save and Close your report.