**TASK REPORT INSTRUCTIONS**

**Overview:** The task report is a critical tool for tracking team status over the course of the project, and is a concept widely used (though exact form differs) in professional practice in managing project teams. It is useful for both the project mentor/supervisor and for the team: For the supervisor, it provides continuous insight into the progress the team is making, as well who is contributing what to team output. For the team, it is a valuable communication tool, making very clear and explicit what tasks needed to be done, who was supposed to do them…and whether that person(s) is performing well.

**Filling out the Task Report**

Filling out the task report is designed to be relatively low overhead, by making it mostly an operation of copy-paste, with appropriate updating. The team should plan to meet each week, shortly before their mentor meeting to discuss existing tasks to update the task report accurately, as well as to negotiate tasks/assignments to list for the coming week.

**Things to do just once.**

The first thing to do is to customize your task report for your team. Fill in the items shown in red in the header area: team name and logo, project title, plus names and small (50x50 pixel or so) headshots of all team members. SAVE THIS OFF to use as your template for the whole year.

**What to do every week, before your mentor meeting:**

Meet as a team before your mentor meeting to discuss tasks and create new task report.

**A. Getting started.**  The first thing to do is to open your task report from \*last week\* and save it off as a new file. This is how the overhead stays low: you make every week’s report by editing/updating the one from last week! Checklist:

* Update the report number at top right: counts up by one each week
* Update the date to show correct date for mentor meeting (paper version only).
* Bullet out your meetings in the last week, either team internal or with client. Do not list your mentor meeting.

**B. Update Status on tasks tackled in past week.**

Start with last week’s task report. Review all tasks assigned for last week. Hopefully you will assign them a status of “complete” and move them to “TASKS COMPLETED” in the current task report you are creating.
If a task was not completed, show its percentage complete in the STATUS field. If it is past its due date, also add the work “OVERDUE” to the percentage shown in STATUS.

**C. Plan and assign tasks for coming week**

Next turn your attention to the coming week. Discuss workload and create specific tasks that should be completed. This means copy-pasting an empty copy of a task table, into the “COMING WEEK plan” area, and filling it out. Please observe the following:

* Task title: is just a short 2-5 word title for the task, e.g., “Implement database updating”.
* Task initiation: is the date that you create/assign the task. Never changed after creation.
* Task due date: is the date that you set for task completion. This states clearly when you expect the task to be completed.
* Status: starts out “in progress” and 0% done. Hopefully the next status will be “complete” and 100% as you move it to the “TASKS COMPLETED” section next week. But if a task slips, it stays in “THIS WEEK” and the completion percentage is shown. If it passes the due date, it’s status becomes “OVERDUE”.
* Who: States who is responsible for the task. If there are multiple people responsible for it, it shows the percentage of responsibility/contribution of each.
* Description: Elaborates on the short task title by giving a brief 2-3 sentence description. For the “database updating” task title mentioned above, it might be “Explore API between MyFrameWork and our PostgreSQL database, and implement reliable update of our client records”
* Expected Outcome: Succintly describes exactly what deliverable(s) you expect to see at completion. For our example this might be “A simple web page that opens to show all current records, allows user to select a record and enter an updated value for some field. After submit, the page refreshes to show the updated database”. See? Avoids misunderstandings about what completing the task means.

VITAL POINTERS regarding tasks:

* Your tasks should be small and detailed enough to complete in a week. It’s useless to list “do the user interface” as a task, with a deadline four weeks out! You should rarely have tasks that span more than a week. If a task seems longer than a week, split it into task:partA and task:partB, each a week long and showing what you expect done after each week.
* Avoid assigning tasks to multiple people when possible. If a task is big, split it into task:PartA, taskPartB etc, with each of these subtasks and expected outcomes detailed. If you do have to list multiple people, try to specify what contributions/outcomes are expected for each.
* You should typically aim to have each team member assigned to one or more tasks each week. If you don’t, then something is broken with your teaming process!

**D. Finish up last task report details**

You’re almost done! Now just fill out the last sections of the task report.

1. **Upcoming Tasks:** Just list larger tasks that you see on the horizon, e.g., “Draft of feasibility report” or “Design Review II”. The idea is just to be explicitly aware of larger tasks/deadlines coming up in the next weeks. These can be quite large-grained; they will be broken into subtasks and assigned when you get to them.
2. **Other problems/Issues:**  This is just a great place to note down any issues/problems/misunderstandings that happened…and that you might want to capture or discuss with your mentor at the meeting.