Project - Updating the Task List

This project includes:

Excel File 1 – Task List.xlsb

- This is the list that we will be updating. This excel file lists all the outstanding tasks, and we will need to update this list using Submitted 20190901.xlsx and Confirmed Tasks 20190901.xlsx

Excel File 2 – Submitted 20190901.xlsx

- List of all the tasks submitted over the last year (9/1/2018 – 9/1/2019)

Excel File 3 – Confirmed Tasks 20190901.xlsx

- List of all the tasks that have been reviewed for confirmation over the last year (9/1/2018 – 9/1/2019)

Project Description

The parent company you work for has many subsidiaries, each of which must submit a proposal each time they would like to undertake a large task. This project focuses on managing the list of these proposals.

The task list keeps a lot of information about the tasks, all of which is sourced from two reports: the Submitted report (Submitted 20190901.xlsx) and the Confirmed Tasks report (Confirmed Tasks 20190901.xlsx). These reports do not have the exact same fields, and are not in the same format, adding to the complexity and difficulty of this project!

Here are all the Task List fields and what they mean:

- **Task Num** – This is the code assigned to a task when it is submitted for review. A task can encompass multiple companies, so the Task List can have multiple rows for each Task Num
- **Final Task Code** – Similar to Task Num, but this code is assigned after a task has been reviewed. If the task is still "Pending", this field will just be "N/A"
- **Group Num** – ID of the Group
- **Group** – The Line of Business for the indicated company
- **Company Num** – ID of the Company
- **Company** – The name of the company. If the task applies to multiple companies, each company in the Task is given its own line
- **Task Description** – Description of the Task
- **Total Budget** – Total Budget
- **Effective Start Date** – Date task is scheduled to start
- **Status** – Review status of the task. When a task is initially submitted, the status is Pending. Once a task is reviewed, the task will appear in the Confirmed Tasks report in addition to the Submitted report, and the Status will be decided.
- **Submission Date** – Date the task is submitted. The list is ordered by Submission Date, with the most recently submitted tasks being at the top
- **Date Row was Entered** – This is updated every time we insert new rows into the list, with the date of the report being the value we use for these new rows.
- **Date Row was Updated** – Sometimes a task can be both submitted and reviewed before we get a chance to put it into the list. In this case, the record of the task will not need to be updated. But typically a new task is inserted that is still Pending, and we will have to update the record later to reflect the final decision on the task. When we update the records, we will use the date of the Confirmed Tasks report as the value for the update records.

Best of luck!