



The Taylor Institute for Teaching and Learning (TI) Research Associate (RA) Program holds the vision of creating a community of research, innovation, and excellence in undergraduate and graduate students employed at the TI. The RA Program invites current RAs to develop the knowledge, skills, and abilities required to meet individual project goals, engage in the TI community, and create meaningful work experiences that empower their future aspirations. This guide on creating and managing tasks on Excel is one potential means for RAs to record, organize, and report their development within the context their diverse roles at the TI.

Step 1: Create Excel workbook document.

Create a separate List row for each of the following: Title and "Last backup date".

Step 2: Insert Table (with Headers) seven columns wide and ten rows deep.

| | A | B | C | D | E | F | G |
|---|-----------------------------|---------|---------|---------|---------|---------|---------|
| 1 | Rachel's Task List | | | | | | |
| 2 | Last backup date: 13.Feb.17 | | | | | | |
| 3 | | | | | | | |
| 4 | Column1 | Column2 | Column3 | Column4 | Column5 | Column6 | Column7 |
| 5 | | | | | | | |

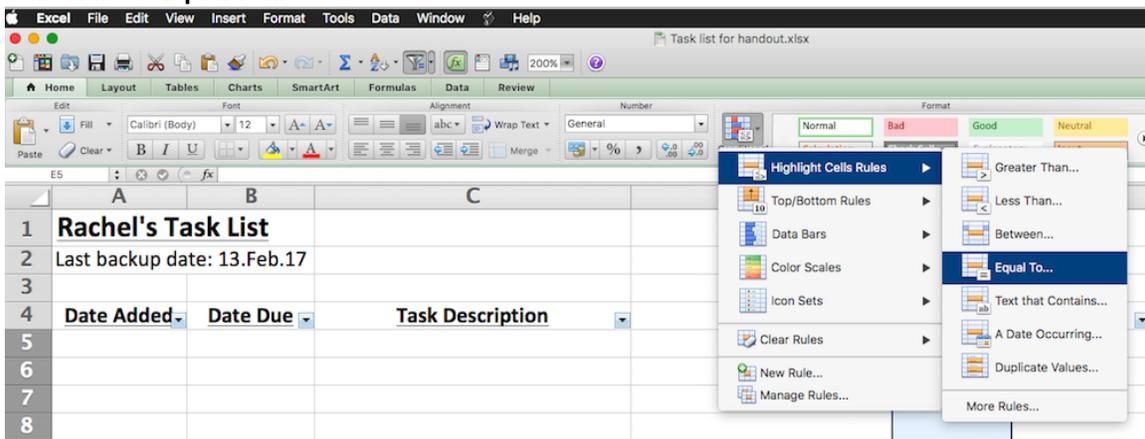
Step 3: Label each column

Label each column from left to right as shown. Make adjustments to width, text alignment, and formatting (etc.) as desired.

| | A | B | C | D | E | F | G |
|---|-----------------------------|----------|------------------|-----|----------|----------|-------|
| 1 | Rachel's Task List | | | | | | |
| 2 | Last backup date: 13.Feb.17 | | | | | | |
| 3 | | | | | | | |
| 4 | Date Added | Date Due | Task Description | For | Priority | Progress | Month |
| 5 | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |

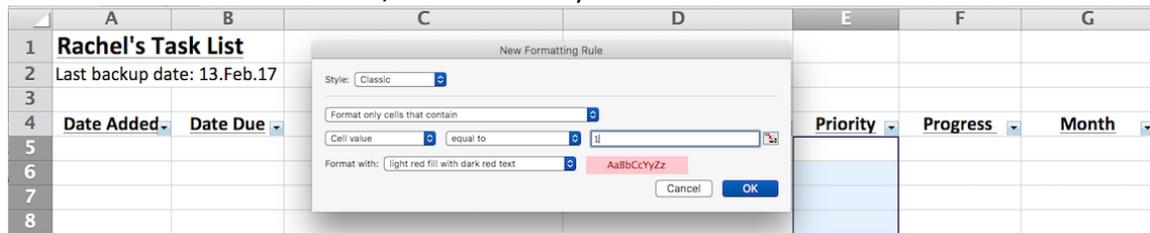
Step 4: Apply Conditional Formatting

Select the 10 rows in the "Priority" column. Click Home > Conditional Formatting > Highlight Cells Rules > Equal To...



Step 5: Create formatting rules for “Priority” and “Progress” columns

Select cell values and format fill/text colours as you desire.



A prioritization system could be as follows: 0 = complete, 1 = top priority, 2 = next priority, 3 = “if there’s time”.

| | A | B | C | D | E | F | G |
|---|-----------------------------|----------|------------------|-----|----------|----------|-------|
| 1 | Rachel's Task List | | | | | | |
| 2 | Last backup date: 13.Feb.17 | | | | | | |
| 3 | | | | | | | |
| 4 | Date Added | Date Due | Task Description | For | Priority | Progress | Month |
| 5 | | | | | 0 | Complete | |
| 6 | | | | | 1 | Ongoing | |
| 7 | | | | | 2 | | |
| 8 | | | | | 3 | | |
| 9 | | | | | | | |

Step 6: Fill in and maintain your task sheet

As you fill in your tasks, organize and arrange the information as desired using the drop-down menus in the table headers. To reset, return to these menus and click **Select All**.

| | A | B | C | D | E | F | G |
|----|-----------------------------|-----------|---------------------------|---------------|----------|----------|-------|
| 1 | Rachel's Task List | | | | | | |
| 2 | Last backup date: 12.Feb.17 | | | | | | |
| 3 | | | | | | | |
| 4 | Date Added | Date Due | Task Description | For | Priority | Progress | Month |
| 5 | 12.Feb.17 | 20.Feb.17 | Lunch/Learn: Order food | L & L (W2017) | 3 | | ruary |
| 6 | 12.Feb.17 | 17.Feb.17 | 1 post on RA Notebooks | RA Notebooks | 2 | | ruary |
| 7 | 12.Feb.17 | 13.Feb.17 | Update RAPID Badge online | RAPID | 1 | | ruary |
| 8 | 12.Feb.17 | 14.Feb.17 | MP: Check-in with Nancy | RA Program | 1 | | ruary |
| 9 | 12.Feb.17 | 15.Feb.17 | M: Check-in with Nancy | RA Program | 1 | | ruary |
| 10 | 12.Feb.17 | 12.Feb.17 | Create task list handout | RA Program | 0 | | ruary |
| 11 | | | | | | | |
| 12 | | | | | | | |
| 13 | | | | | | | |
| 14 | | | | | | | |
| 15 | | | | | | | |

Tips and Tricks

- Select the cells in each column. Click **Home**. Align the text in each column to your preference. The examples in this handout use a combination of **Align Text Top**, **Align Text Left**, **Align Text Centre**, and **Wrap Text**.
- Create your own shorthand to keep descriptions consistent and brief, e.g., “MP” = “Meeting Prep”.
- Create tasks that are small enough for you to mark one “Complete” every day, e.g., “Write 250 words” or “Email supervisor regarding project report”.
- Adapt this format to manage citations, links, and environmental scans.
- Need support? Email screenshot to Rachel Braun (rabraun@ucalgary.ca)