# Project Planner Excel Spreadsheet & Dashboard

# * User Manual *

# Table of Contents

## Summary

This user manual has been created to help you get the most out of your new download.

Your download file should have the following:

- 1 x Excel file that includes:
  - Instructions tab (this shows what each field in the data tab does and which ones have calculations in that should not be typed over)
  - DATA tab (where we add tasks, due dates and lots of other good stuff)
  - DASHBOARD Tab (this is an automated Gantt chart that is driven by a pivot table – this is just a way to VIEW the information from the data tab)
- This user manual

Whether you are working on a large multifaceted programme for a challenging client or keeping track of your small business – this tool is just what you need to get completely organised without the need for expensive software.

It will show you what task is due to be completed by when, who should be doing it and how close you are to the finish line (% Complete) amongst other things.

This guide will take you though each element of the workbook with screenshots – so you always have it to refer back to if you get lost.

I am constantly working on new tools so please do come back and visit me at any of my various homes to see what else I might be able to help you with.

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## *Entering the data*

Any plan is only as good as the data we can put into it.

This project planning tool allows for 3 levels of task – the reason for this is that larger projects often have tasks within tasks…

Let's say for example that you are working on an email campaign for your new product "super amazing product #1"

Your Tier 0 or Workstream (T0) task would be "Product #1 email campaign"

Your NEXT level tasks (T1) tasks might then be

1. Select target audience
2. Set up the email software autoresponder
3. Decide affiliate programmes to pair with my product
4. Select upsells for the campaign
5. Select on sells for the campaign
6. Launch

Your data input sheet would therefore look like this:

| Workstream (T0) | Level 1 Task (T1) |
|---|---|
| Product #1 email campaign | Select target audience |
| Product #1 email campaign | Set up the email software autoresponder |
| Product #1 email campaign | Decide affiliate programmes to pair with my product |
| Product #1 email campaign | Select upsells for the campaign |
| Product #1 email campaign | Select on sells for the campaign |
| Product #1 email campaign | Launch |
| | |
| | |

Note that I have repeated the information at the workstream level – this **is very important** as excel will use the data in this column to create the dashboard Gantt chart.

For this same reason it is important that the data is EXACTLTY the same so please copy and paste it into the cell where you need it to be to avoid any spelling mistakes or spaces in the wrong places.

> *When I use this sheet for my projects, I often create these fields as drop-down menus to ensure consistency – this is very easy to set up if you feel like it would help & you tube has some great videos on how to do it.*

If you are happy with just these 2 levels, then feel free to skip along to the next section on page 6.

If, however you think you might want to use the 3rd level of tasks – read on…

Using the same example of the email campaign, lets assume that in your level 1 task of "select target audience" you want to do 3 more things – these might include:

1. Look at my customer records to see who has bought something similar in the past
2. Make a list of businesses that would benefit from my product
3. Examine my competitors' customers to see what I can learn

If you added this data to your sheet – it would now look like this:

| Workstream (T0) | Level 1 Task (T1) | Level 2 Task (T2) |
|---|---|---|
| Product #1 email campaign | Select target audience | Look at my customer records to see who has bought something similar in the past |
| Product #1 email campaign | Select target audience | Make a list of businesses that would benefit from my product |
| Product #1 email campaign | Select target audience | Examine my competitors' customers to see what I can learn |
| Product #1 email campaign | Set up the email software autoresponder | |
| Product #1 email campaign | Decide affiliate programmes to pair with my product | |
| Product #1 email campaign | Select upsells for the campaign | |
| Product #1 email campaign | Select on sells for the campaign | |
| Product #1 email campaign | Launch | |

You will see again that I have repeated the information in the 1st 2 levels (T0 & T1) so that our Gantt chart will work on the dashboard (skip to ***The Dashboard*** if you want to see this in action)

In your download folder you will see that I have added an extra copy of the file which is prepopulated with the data I have used in this manual, it's just for demonstration purposes so it's not strictly accurate but it might help you out of you get a bot stuck.

Please do NOT delete any columns in your working sheets as it will damage many of the linked formulas and your sheet will stop working properly. If you need to delete lines of data in the data tab though – that's perfectly fine.

## Linked RAID Ref # (Column D)

If you are using a Risks, Assumptions, Issue and Dependencies (RAID) log (see BONUS file in your download folder) then you can enter the reference here - this will help if there is a part of your plan that is overdue, and the reasons are logged in your RAID - you can track it here.

## Status (Column E)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This field will automatically calculate and colour code the status of your task based on the due date, completed date and task duration.

It will use **today's date to automatically** highlight those tasks that have fallen due and have not had a completion date entered in the relevant column.

## Progress (Column F)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

Using the due date and task duration this field will provide a % for progress completed based again on today's date - this can be useful if you see a task that is almost complete, but you know it's delivery will be delayed - you can change the due date and duration.

## Key Milestone (Column G)

a simple "Y" in this field will allow you to select all milestone tasks in one click from the slicer at the top of the data sheet and also on the dashboard, this is a manual entry field, you can type "Y" or “Yes” or X – whatever you like – just keep it constant.

## Key update (Column H)

If you have updated a large number of tasks on one day or just want to group some activities together and want to see them all in a single view - denote them as key update tasks and select them on either the dashboard or the data sheet.

You can use different letters or key words for different groupings if you like. Just keep it short at whatever you put in here will show up in your slicer selections at the top of the page.

Don't forget to take the letters / notes out of this field when you are done with it.

## Start Date (Column I)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that works out the start date of your task based on the due date and the duration that you entered into the relevant fields - it assumes that duration is workdays only and automatically accounts for weekends - do not type over this date - if you want it to change, adjust the duration days instead.

## Start Week (Column J)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

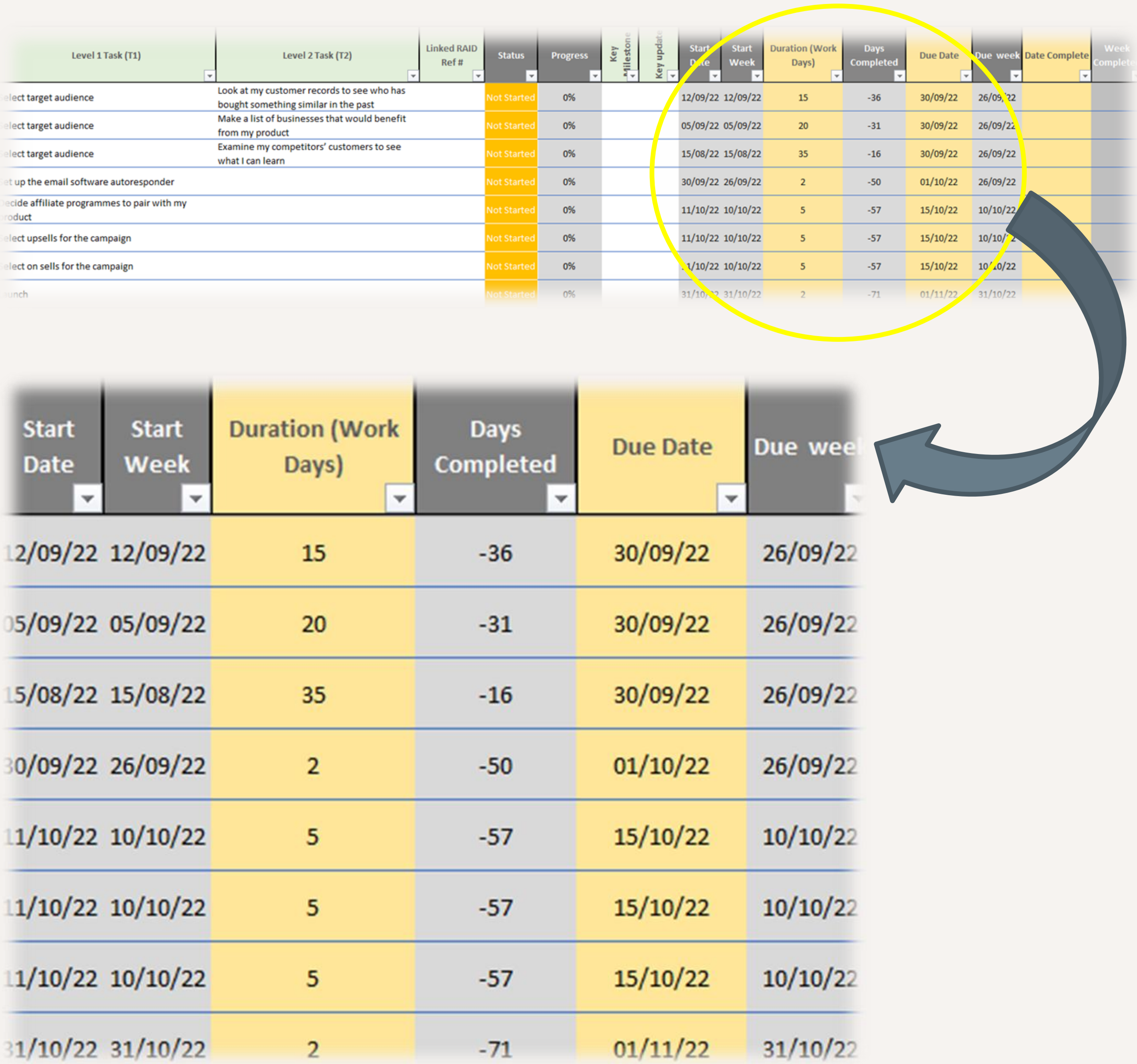
This is a calculated field that looks up the start date in a week table and returns the date that Monday falls on for that week - do not type over this field as it is used to summarise the data on the dashboard into the Gantt chart by week.

## Duration (Workdays) – (Column K)

Enter here how many workdays you think this task will take: e.g. if you think it will take you 2 weeks - enter 10 into this field. Note that this field requires numbers only – anything else such as a letter or full stop added here will prevent the formulas from working and might make the rest of your sheet look very broken!

It is important to add the duration days to the sheet as it will use this to calculate the start date of your task.

Using our previous example, lets imaging that we have a number of due dates that we want to complete our tasks by, and we have an estimate of how long these things will take.



| Level 1 Task (T1) | Level 2 Task (T2) | Linked RAID Ref # | Status | Progress | Key Milestone | Key update | Start Date | Start Week | Duration (Work Days) | Days Completed | Due Date | Due week | Date Complete | Week Completed |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| elect target audience | Look at my customer records to see who has bought something similar in the past | | Not Started | 0% | | | 12/09/22 | 12/09/22 | 15 | -36 | 30/09/22 | 26/09/22 | | |
| elect target audience | Make a list of businesses that would benefit from my product | | Not Started | 0% | | | 05/09/22 | 05/09/22 | 20 | -31 | 30/09/22 | 26/09/22 | | |
| elect target audience | Examine my competitors' customers to see what I can learn | | Not Started | 0% | | | 15/08/22 | 15/08/22 | 35 | -16 | 30/09/22 | 26/09/22 | | |
| t up the email software autoresponder | | | Not Started | 0% | | | 30/09/22 | 26/09/22 | 2 | -50 | 01/10/22 | 26/09/22 | | |
| ecide affiliate programmes to pair with my roduct | | | Not Started | 0% | | | 11/10/22 | 10/10/22 | 5 | -57 | 15/10/22 | 10/10/22 | | |
| elect upsells for the campaign | | | Not Started | 0% | | | 11/10/22 | 10/10/22 | 5 | -57 | 15/10/22 | 10/10/22 | | |
| elect on sells for the campaign | | | Not Started | 0% | | | 11/10/22 | 10/10/22 | 5 | -57 | 15/10/22 | 10/10/22 | | |
| unch | | | Not Started | 0% | | | 31/10/22 | 31/10/22 | 2 | -71 | 01/11/22 | 31/10/22 | | |

| Start Date | Start Week | Duration (Work Days) | Days Completed | Due Date | Due wee |
|---|---|---|---|---|---|
| 12/09/22 | 12/09/22 | 15 | -36 | 30/09/22 | 26/09/22 |
| 05/09/22 | 05/09/22 | 20 | -31 | 30/09/22 | 26/09/22 |
| 15/08/22 | 15/08/22 | 35 | -16 | 30/09/22 | 26/09/22 |
| 30/09/22 | 26/09/22 | 2 | -50 | 01/10/22 | 26/09/22 |
| 11/10/22 | 10/10/22 | 5 | -57 | 15/10/22 | 10/10/22 |
| 11/10/22 | 10/10/22 | 5 | -57 | 15/10/22 | 10/10/22 |
| 11/10/22 | 10/10/22 | 5 | -57 | 15/10/22 | 10/10/22 |
| 31/10/22 | 31/10/22 | 2 | -71 | 01/11/22 | 31/10/22 |

*The grey fields are calculated for you – the only data that is required is highlighted in yellow.*

The days completed shows a minus value in this example as we have not started the task yet – however if I change the duration of the task because I think it will take me longer it would look like this:

| Status | Progress | Key Milestone | Key update | Start Date | Start Week | Duration (Work Days) | Days Completed | Due Date | Due week |
|---|---|---|---|---|---|---|---|---|---|
| Started | 9% | | | 18/07/22 | 18/07/22 | 55 | 5 | 30/09/22 | 26/09/22 |

Here I have changed my 1st task from taking 15 days to taking 55 days – the formula in the sheet now calculates how may days I must have already completed (based on "todays date"

NOTE: the "TODAY()" formula used in this sheet is always "today" and takes the system date in your computer to see exactly what date today is.

## Days Completed (Column L)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that uses today's date and the start date to return the number of workdays that have been used on this task so far - the result of this drives the calculation in the progress column.

## Due Date (Column M)

Enter the due date of this specific task - DATES only - please don't add any text in here as this field drives a number of other calculations throughout the data sheet and the dashboard.

If you notice that some of the cells next to the due date look wrong, it might be that you have entered the date in incorrectly.

If you are in the UK type "dd/mm" or "dd/mm/yyyy" if you want a date outside of the current year. So, for the 1st of December I would type 01/12 or 01/12/2023 – NOT 01.12, the computer will see "01.12" as text – not a "date".

For the US version of this sheet type in "mm/dd" or "mm/dd/yyyy" if you want a date outside of the current year, as above use the slash symbol to separate your date from month, not a full stop (period).

## Due week (Column N)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that looks up the due date in a week table (this sits in a hidden sheet in the workbook) and returns the date that Monday falls on for that week - do not type over this field as it is used to summarise the data on the dashboard into the Gantt chart by week

## Date Complete (Column O)

If your task has been completed - enter the final completed date in here and your reports will instantly show that the task is complete.

Please take care again to enter the date in the correct format.

## Week Completed (Column P)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that looks up the completed date in a week table and returns the date that Monday falls on for that week - do not type over this field as it is used to summarise the data on the dashboard into the Gantt chart by week

## Workstream lead (Column Q)

Add in here the name of the Workstream lead (if you have one) obviously you might want to leave this blank if you have a small team without layers of reporting.

Please also note that as this field is used to select and filter the data in the shortcut buttons both on the data tab and on the dashboard – if you do use multiple names, please make sure that you spell them the same way every time.

## Task Owner (Column R)

Add in here the name of the task owner – you might only want to use this if you have a team of more than 1 person!

Please also note again that as this field is used to select and filter the data in the shortcut buttons both on the data tab and on the dashboard – if you do use multiple names, please make sure that you spell them the same way every time.

## Narrative (Column S)

This is a free text field for project use so you can type anything in here that you need to remind yourself of that relates to this task, this field is not included in reporting so go wild!

## Interdependencies (Column T)

Another free text field for project use so you can type anything in here that reminds you about other task that are either dependant on this one or that this one is dependent on (make sense?).

If for example you are waiting for the supplier to confirm the dimensions of a product before you order the packaging – this is where you would put that detail in.

It can be useful to give tasks references and add hyperlinks to the tasks if you have a lot of these.

## Due Month (Column U)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that looks up the due date in a week table and returns the month so that we can select "due month" in both the data tab and the dashboard - do not type over this field as it is used to summarise the data.

## Due Year (Column V)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that looks up the due date in a week table and returns the YEAR that it is due so that we can select "due year" in both the data tab and the dashboard - do not type over this field as it is used to summarise the data.

## Qtr. (Column W)

### This is a Calculated Field - DO NOT TYPE IN THIS COLUMN

This is a calculated field that looks up the due date in a week table and returns the QTR that it is due so that we can select "Qtr" in both the data tab and the dashboard - do not type over this field as it is used to summarise the data.

- Qtr 1 = January to March
- Qtr 2 = April to June
- Qtr 3 = July to September
- Qtr 4 = October to December

## Adding rows to the data

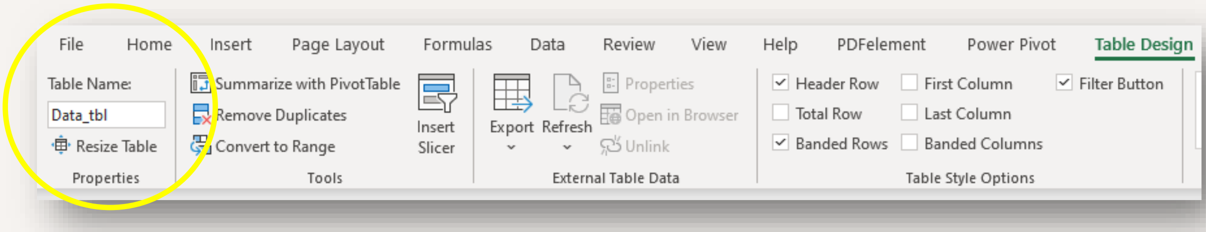
The data in the data tab is formatted as a table – this means that if you start typing a new row of information in the next available row at the end of the current data – it will automatically assume that you are adding data to the table and copy all the formulas that you need down into your new row.

If you skip a row before typing – it will NOT do this, and your new data will not be included in the filtering or the dashboard reports

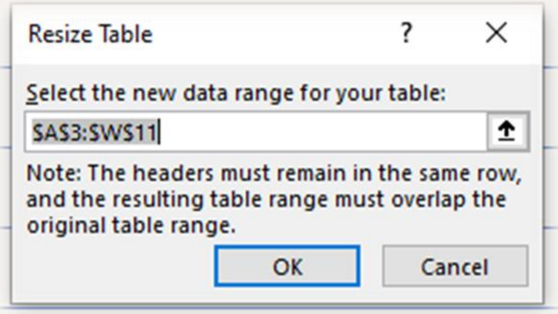
Alternatively, you can add a row into your existing data by selecting a row, right clicking and selecting "insert row" from the menu – this will again copy all the necessary formulas down with it.

One final note on entering data in a data table such as this one, if you do add rows and then find that they have not been captured in the reports or are being excluded from the filtering options, please click into the table (select a cell in one of the headings for example) then go to "Table Design" menu at the top of your page:

When you have this menu up you will see on the far left an option to "resize table"




Click on resize table, and in the popup box make sure that the range is enough to capture all your rows of data – if you're not sure, just increase the number of rows and have a few spares at the end of your data set – i.e. in this example you might change the "$A$3:$W$11" to "$A$3:$W$25" to capture an extra 14 rows.




Be careful here – selecting just the number you want to change can be a bit tricky – if you mistakenly delete everything, just click cancel and start again.

Now that we have entered all the data that we need – we can start to filter it and see what we have in a number of different ways using the shortcut "slicer" boxes at the top of the page.

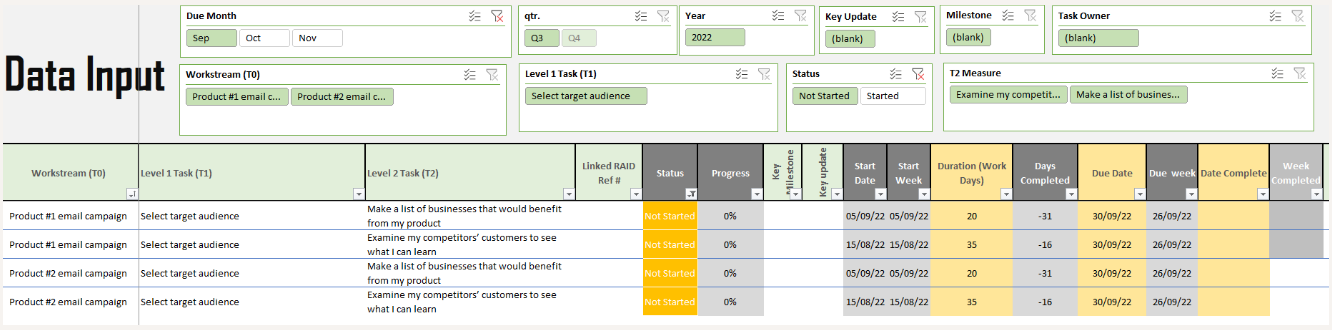
## Filtering the data

This is where we can start to see the magic!

The slicers at the top of your data page will have automatically updated to show your data so you can click on anything and see just that in your data set.

If for example you wanted to only see overdue tasks or tasks due in the next month – then select that from the relevant slicer box.

Use as few or as many as you like:




| Workstream (T0) | Level 1 Task (T1) | Level 2 Task (T2) | Linked RAID Ref # | Status | Progress | Key Milestone | Key update | Start Date | Start Week | Duration (Work Days) | Days Completed | Due Date | Due week | Date Complete | Week Completed |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Product #1 email campaign | Select target audience | Make a list of businesses that would benefit from my product | | Not Started | 0% | | | 05/09/22 | 05/09/22 | 20 | -31 | 30/09/22 | 26/09/22 | | |
| Product #1 email campaign | Select target audience | Examine my competitors' customers to see what I can learn | | Not Started | 0% | | | 15/08/22 | 15/08/22 | 35 | -16 | 30/09/22 | 26/09/22 | | |
| Product #2 email campaign | Select target audience | Make a list of businesses that would benefit from my product | | Not Started | 0% | | | 05/09/22 | 05/09/22 | 20 | -31 | 30/09/22 | 26/09/22 | | |
| Product #2 email campaign | Select target audience | Examine my competitors' customers to see what I can learn | | Not Started | 0% | | | 15/08/22 | 15/08/22 | 35 | -16 | 30/09/22 | 26/09/22 | | |

Here I have selected only those items due in September that have not been started.

I can also make multiple selection in a single slicer by 1st checking the "multiple selections" icon as shown here:


To clear your selection, click the X on the filter sign which will be red when you have selected (or deselected) something.

## *The Dashboard*

The dashboard is for reporting ONLY – you do NOT need to add any data in here – you have already done everything you need to in the data tab.

This sheet is driven by a pivot table which uses the data that you entered in the data tab & all the colours are automatic depending on the status of your tasks.

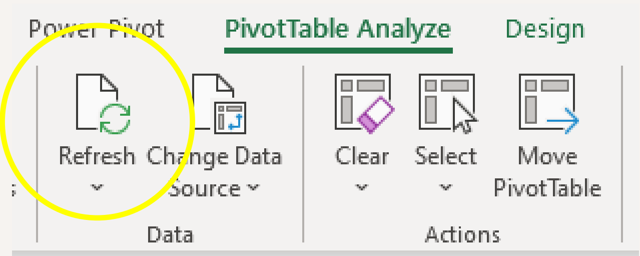
- Blue = Complete
- Green = Started (In progress)
- Red = Overdue
- Yellow = Not started (but has a planned due date and duration)

This means that there is no need to select cells and fill the cells with colour individually just so long as you have entered the due dates and durations in the data tab – these cells will automatically get coloured in!

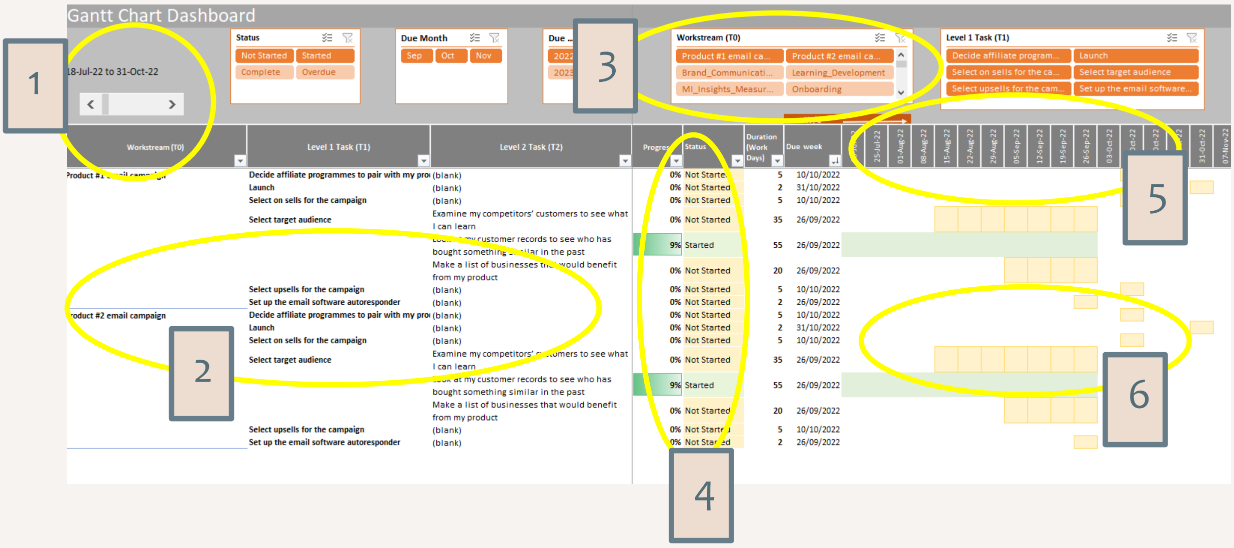
In order to consistently see the latest information in your dashboard you will need to refresh the pivot table, to do this, 1st click into the pivot table.

If you are not sure how to do this, in this sheet the pivot table starts at cell $A$4 so click on that cell.

Next go to the top to your page and select the PivotTable Analysis menu and click "Refresh" as shown here:



# Navigating the dashboard




## 1. Date selection

If you want to view the Gantt chart and the dates that are visible in the date headers (section 5) then you can skip forward or back a week at a time using this handy little scroll bar. It will always show you the date range that you are viewing at the top.

By default, the start of this range is the earliest start date that exists within your data.

## 2. Pivot Table Data

This is your task data that you entered into the data tab.

Please do not try to change this – if you notice something that needs to be corrected – go back to the data tab and do it there – a pivot table is just a “view” of the data.

Even if you entered data out of sequence in the data sheet – the pivot table will collect it all together and show you everything grouped by workstream 1st, then level 1 tasks, then level 2.

## 3. Selection Slicer

Similar to using slicers in the data tab, select just what you want to see in the view and the sheet will automatically change to show you just that information. (see Filtering the data)

## 4. Status and % complete

This is taken from the calculations on the data sheet and will show you clearly what status your tasks / projects are at, which ones are overdue, completed or almost at their due date.

## 5. Week Commencing Date

This range starts at the earliest start date in your data set and will automatically roll up all tasks due in that week (Monday – Sunday) to belonging to that week commencing date.

So, if you have 1 task active (i.e. started but not yet completed) on Friday 15th July, another on Monday 11th July and a 3rd on Saturday 16th July, this will place all of these tasks in the column for W/C 11th July.

## 6. Automatic Gantt Chart

If you have started a task in week 1 and are due to complete it in week 5, all these weeks will be coloured green if you have started it, yellow if you have yet to start it, Red if it's overdue and blue if you have completed it.

There is no need to colour anything in here – it's all automatic!

NOTES:

There is a hidden sheet called tables that contains date references up to the March of 2034 – if you are using this file after that date you will need to adjust the data in the hidden table.

Please do not delete any columns in any of the sheet, data rows can be added or removed from the data sheet only.

The Gantt chart pivot table has been set to refresh on opening – if you do not wish this to happen you will need to change the pivot table settings.

If you have any additional requirements or suggestions, please get in touch: help@linzibee.com

I am constantly working on new tools so please do come back and visit me at any of my various homes to see what else I might be able to help you with.

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