Project Planning and Monitoring Tool

Purpose:

This tool assists in organizing and monitoring project work. By using the task planning section, project milestones and tasks can accurately be planned out. Once the project begins, real-time progress is tracked and the project is monitored against the set baselines.

Instructions:

This tool can be used for managing a project, starting with the planning stages right through to monitoring project progress. Refer to the boxes below to view each sections' instructions, and understand how each step is useful for managing projects.

Alternatively, information entered in Microsoft Project can be copied and pasted into this tool to take advantage of its reporting capabilities. A simple copy and paste will work, however there is some preparation needed:

- 1. Ensure that the fields in MS Project are altered to match this tool. The order should be: Task Name, Start, Finish, and Resource Names.
- 2. Once pasted into this tool's Tab 2, reformat the start and finish columns to use a date format (within the Format menu, choose "Cells..." and select the desired date format).
- 3. Resource Names within MS Project must match the naming conventions used in this tool's Tab 1, table 1.

Important Notice:

Although this tool is capable of advanced functions, keep in mind that this is a light project management tool working within the limitations of Microsoft Excel. Pay close attention to any notices or warnings included within the individual tabs.

Getting Started:

In chronological order, use the boxes below to navigate through the tool as the project progresses. Click the blue buttons to go directly to the section of choice, or use the worksheet tabs along the bottom of the spreadsheet screen. Some of the column headings in the sections include comments that offer additional instructions. Hover the mouse over the column headings to view these instructions.



DATA ENTRY

This section requires some basic data entry to get the project started. nformation regarding project start and end dates, project team members and stakeholders, and non-work days is required.

Go to Data Entry



PROJECT TASK PLANNING

Use this important section to plan out the project. Tasks should be entered, along with deadlines and task owners. Once hashed out and completed, copy and paste this plan into Tab 3 to begin monitoring project progress.

Go to Project Task Planning



PROJECT MONITORING CHART

Copy and paste the project plan from Tab 2 into the first four columns of this Gantt chart. By entering the actual start and end dates for tasks, this chart allows you to view which tasks are on schedule, behind schedule or ahead of schedule.

Go to Project Monitoring



ISSUE LOG

If issues arise, use this area to log and ensure that problems are resolved.

Go to the Issue Log



CUSTOMIZED PROGRESS REPORT

Use this section to generate a custom progress report. Specify the time period that you would like to view and tasks during this time, ordered by task owner, will appear. This report is ideal for weekly meeting updates, or stakeholder progress reporting.

Go to Task Report

Basic Data Entry

Fill in all of the white cells with the necessary information. To view additional instructions, hover your mouse over the table column headings.

Project Name	CRM Implementation						
Estimated Project Start Date	June 1, 2009						
Estimated Project End Date	July 20, 2009						
Project Manager Name	Jane Doe						

1. Project Team Members, Task Groups &
Stakeholders

Stakeholders
Name
Jane Doe
John Doe
Jane and John
John Smith
Kim Lee
Chris Johnson
Alex Singh
Marketing Department Production Team
Production Team

2. Holidays / Time Off Project								
Date	Holiday							
10-Apr-09	Good Friday							
13-Apr-09	Easter Monday							
15-Apr-09	All Day Dept Meeting April							
18-May-09	Canadian Victoria Day							
4-Jul-09	US Independence Day							
3-Jul-09	Non-Project Work Day							
12-Oct-09	Canadian Thanksgiving							
26-Nov-09	US Thanksgiving							
25-Dec-09	Christmas Day							
1-Jan-10	New Year's Day							

Use this section to work out the project plan. Feel free to add and delete rows as necessary, or move tasks around until the optimal project plan has been drafted. Once satisfied with the project plan, copy this information and paste it into the corresponding table in Tab 3. **No changes can be made to the project plan within Tab 3**, so ensure that if any changes are needed, the adjustments are made in this tab before re-copying and repasting the data into Tab 3.

An example has been included below.

Project Task Information							
Project Task	Estimated Start Date	Estimated Completion Date	Task Owner (MUST USE DROP DOWN MENU)				
Project Feasibility Study	1-Jun-09	3-Jun-09	Alex Singh				
Cost Benefit Analysis	2-Jun-09	4-Jun-09	Jane and John				
Project Definition	6-Jun-09 8-Jun-09	8-Jun-09 9-Jun-09	Jane Doe				
Assign Resources Create Project Plan	8-Jun-09 9-Jun-09	9-Jun-09 16-Jun-09	John Smith Kim Lee				
Create Communications Plan	9-341-09 15-Jun-09	17-Jun-09	Jane Doe				
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Project Kick-Off Meeting	19-Jun-09	19-Jun-09	Jane Doe				
Create Phase 1 Plan and Definition	00 him 00	24 1 00	lon- D				
Create Phase 1 Plan and Definition Phase 1 Execution Kick-Off	22-Jun-09 24-Jun-09	24-Jun-09 24-Jun-09	Jane Doe Jane Doe				
Communicate Phase 1 Progress	24-Jun-09 25-Jun-09	24-Jun-09 1-Jul-09	Jane Doe John Doe				
Communicate Friase i Frogress Change Control Processes	1-Jul-09	2-Jul-09	Jane and John				
Close Phase 1	2-Jul-09	3-Jul-09	Jane Doe				
	2 3 5 5 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7						
Create Phase 2 Plan and Definition	1-Jul-09	3-Jul-09	Chris Johnson				
Phase 2 Execution Kick-Off	6-Jul-09	6-Jul-09	Chris Johnson				
Communicate Phase 2 Progress	7-Jul-09	9-Jul-09	Chris Johnson				
Change Control Processes	9-Jul-09	10-Jul-09	Chris Johnson				
Close Phase 2	13-Jul-09	14-Jul-09	Jane Doe				
Project Delivery	15-Jul-09	15-Jul-09	Production Team				
Project Closure Meeting	16-Jul-09	16-Jul-09	Jane Doe				
Performance Appraisal	16-Jul-09	18-Jul-09	Jane Doe				
Project Feedback Form	16-Jul-09	18-Jul-09	Kim Lee				
Project Debrief Report	17-Jul-09	20-Jul-09	Jane Doe				
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Work Schedule Monitoring

IMPORTANT NOTICE:
It is very important that tasks are entered with unique names. If task names are repeated, the data will not carry over correctly, sure to name each task differently.

IMPORTANT NOTICE:
Rose cannot be insented or deleted from the table below. If changes are made to the project plan, make these changes in Tab 2.

Ramining, and copy and paste the changes into this sheef. Be saven that the actual start and end dates will not update when chan are copy and pasted into this sheet, so make adjustments to these last two columns as necessary.

GANTT CHART LEGEND
Holiday / Vacation / No Work
Planned Project Work Day
Task Completed
COMPLETION STATUS LEGEND
Task Completed of Schedule
Task Completed Shebald Schedule

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16-00 16-0	Close Phase 2	13-Jul-09	14-Jul-09	Jane Doe																										
	Project Delivery	15-Jul-09	15-Jul-09	Production Team																										
	Project Closure Meeting Performance Appraisal	16-Jul-09 16-Jul-09	16-Jul-09 18-Jul-09	Jane Doe Jane Doe																										
	Project Feedback Form Project Debrief Report	16-Jul-09 17-Jul-09	18-Jul-09 20-Jul-09	Kim Lee Jane Doe	1			1																				Ш		
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Issue Log

Date	Issue	Comments	Resolution
3-Jan-09	Sample Issue		

Customized Progress Report

To create a customized progress report, insert the desired timeframe for analysis in the start and end date boxes below. For a progress report of the entire project, insert the project's start and end dates. Consider running reports based on tasks for today, this week, or next week.

IMPORTANT NOTICE:

Task owner names must be selected from the drop down menus in Tabs 2 and 3 in order for this reporting page to work correctly. If errors occur on this page, return to the project planning stage and ensure that task owner names were selected from the menus, rather than typed in manually.

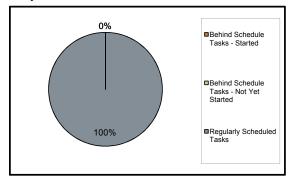
Enter Date to Start Progress Report

Thursday, June 04, 2009

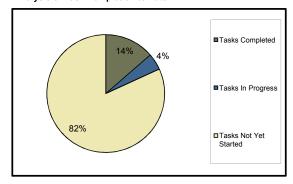
Enter Date to End Progress Report

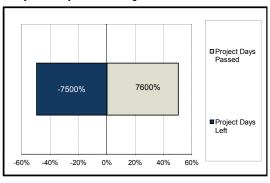
Monday, July 20, 2009

Analysis of On-Schedule Tasks to Date

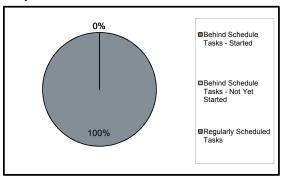


Analysis of Task Completion to Date

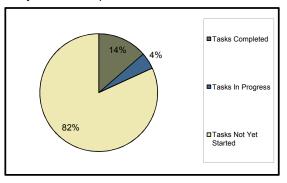


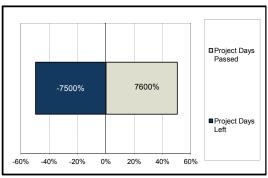


Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status
Jane Doe	Create Communications Plan	Task Not Yet Started	June 17, 2009	Task is scheduled for work during this timeframe.
	Project Kick-Off Meeting	Task Not Yet Started	June 19, 2009	Task is scheduled for work during this timeframe.
	Create Phase 1 Plan and Definition	Task Not Yet Started	June 24, 2009	Task is scheduled for work during this timeframe.
	Phase 1 Execution Kick-Off	Task Not Yet Started	June 24, 2009	Task is scheduled for work during this timeframe.
	Close Phase 1	Task Not Yet Started	July 3, 2009	Task is scheduled for work during this timeframe.
	Close Phase 2	Task Not Yet Started	July 14, 2009	Task is scheduled for work during this timeframe.
	Project Closure Meeting	Task Not Yet Started	July 16, 2009	Task is scheduled for work during this timeframe.
	Performance Appraisal	Task Not Yet Started	July 18, 2009	Task is scheduled for work during this timeframe.
	Project Debrief Report	Task Not Yet Started	July 20, 2009	Task is scheduled for work during this timeframe.
Chris Johnson	Create Phase 2 Plan and Definition	Task Not Yet Started	July 3, 2009	Task is scheduled for work during this timeframe.
	Phase 2 Execution Kick-Off	Task Not Yet Started	July 6, 2009	Task is scheduled for work during this timeframe.

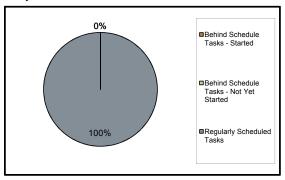


Analysis of Task Completion to Date



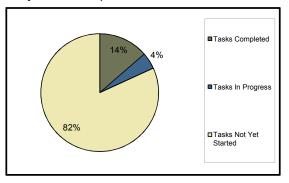


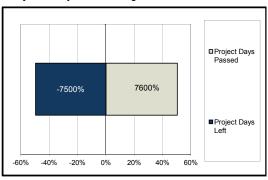
Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status
	Communicate Phase 2 Progress	Task Not Yet Started	July 9, 2009	Task is scheduled for work during this timeframe.
	Change Control Processes	Task Not Yet Started	July 2, 2009	Task is scheduled for work during this timeframe.
Kim Lee	Create Project Plan	Task Not Yet Started	June 16, 2009	Task is scheduled for work during this timeframe.
	Project Feedback Form	Task Not Yet Started	July 18, 2009	Task is scheduled for work during this timeframe.
John Doe	Communicate Phase 1 Progress	Task Not Yet Started	July 1, 2009	Task is scheduled for work during this timeframe.
Jane and John	Change Control Processes	Task Not Yet Started	July 2, 2009	Task is scheduled for work during this timeframe.
John Smith	Assign Resources	Task In Progress	June 9, 2009	Task is scheduled for work during this timeframe.
Production Team	Project Delivery	Task Not Yet Started	July 15, 2009	Task is scheduled for work during this timeframe.



Analysis of Task Completion to Date

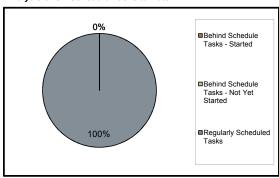
Thursday, June 04, 2009



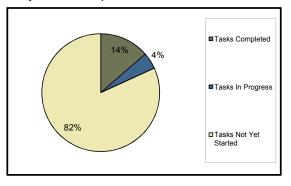


Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status

Enter Date to Start Progress Report

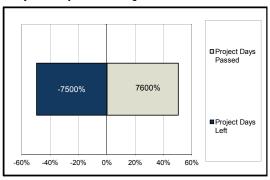


Analysis of Task Completion to Date



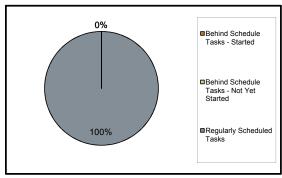
Analysis of Project Time Management

Enter Date to End Progress Report

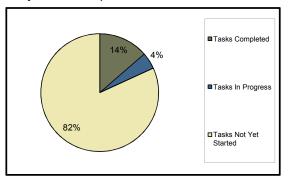


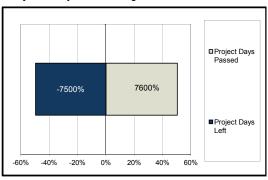
Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status

Enter Date to Start Progress Report



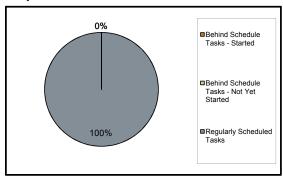
Analysis of Task Completion to Date



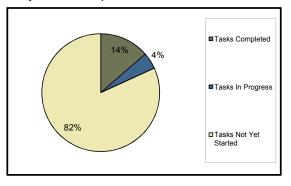


Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status

Enter Date to Start Progress Report

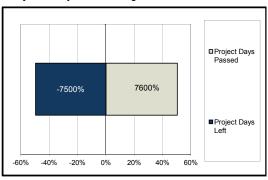


Analysis of Task Completion to Date



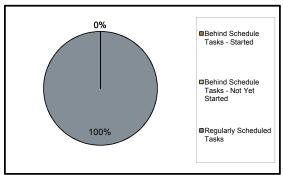
Analysis of Project Time Management

Enter Date to End Progress Report

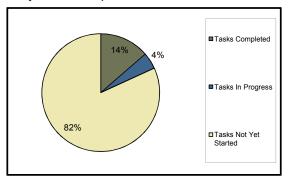


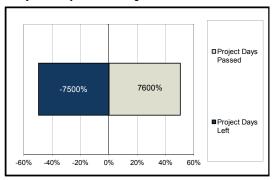
Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status

Enter Date to Start Progress Report



Analysis of Task Completion to Date





Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status