

# 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.

# 1

### DATA ENTRY

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

[Go to Data Entry](#)

# 2

### 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](#)

# 3

### 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](#)

# 4

### ISSUE LOG

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

[Go to the Issue Log](#)

# 5

### 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](#)











# Customized Progress Report

[Return to the Introduction](#)

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.

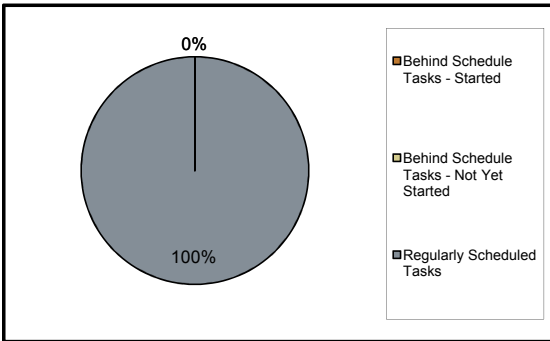
**IMPORTANT NOTICE:**

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.

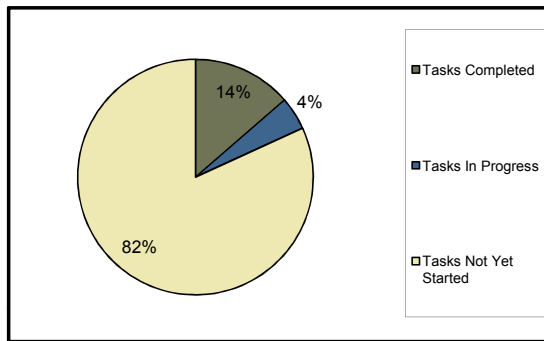
Enter Date to Start Progress Report      Thursday, June 04, 2009

Enter Date to End Progress Report      Monday, July 20, 2009

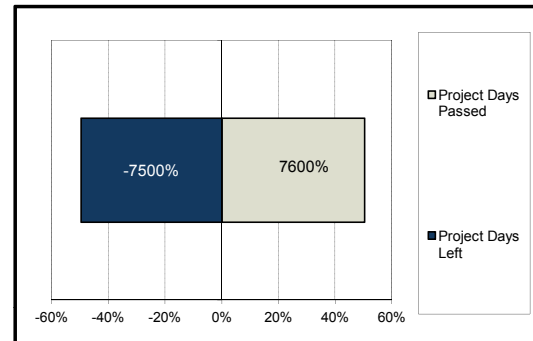
**Analysis of On-Schedule Tasks to Date**



**Analysis of Task Completion to Date**



**Analysis of Project Time Management**

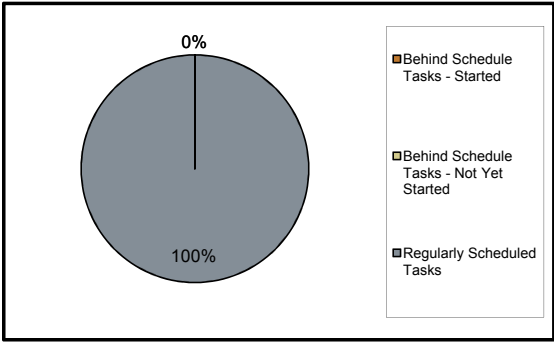


Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status
Jane Doe	Create Communications Plan	Task Not Yet Started	June 17, 2009	Task is scheduled for work during this timeframe.
	Project Kick-Off Meeting	Task Not Yet Started	June 19, 2009	Task is scheduled 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.

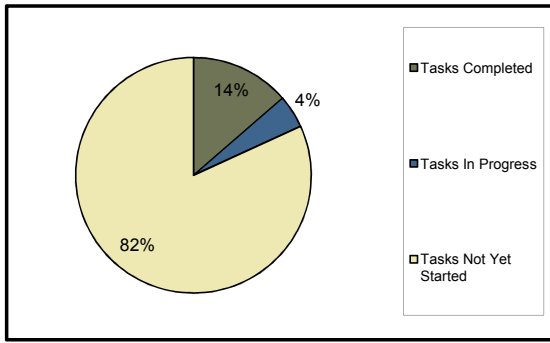
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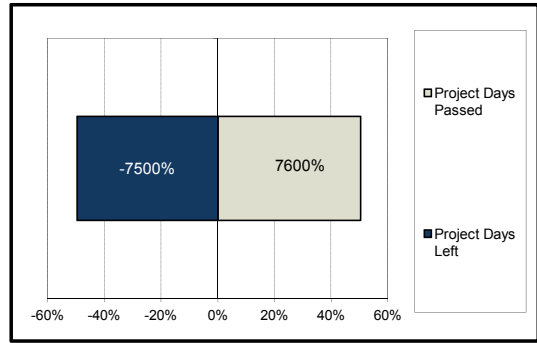
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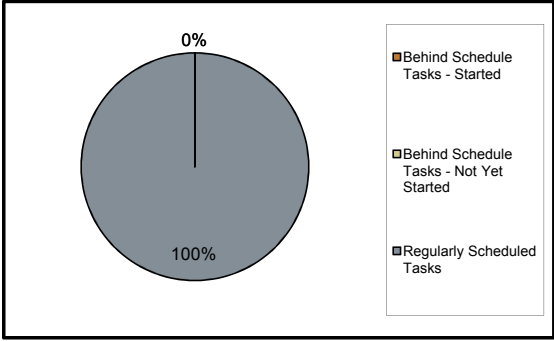
Task Owner	Task to be Completed During Specified Period	Task Status	Scheduled Due Date	On Track Status
Kim Lee	Communicate Phase 2 Progress	Task Not Yet Started	July 9, 2009	Task is scheduled for work during this timeframe.
	Change Control Processes	Task Not Yet Started	July 2, 2009	Task is scheduled for work during this timeframe.
	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.



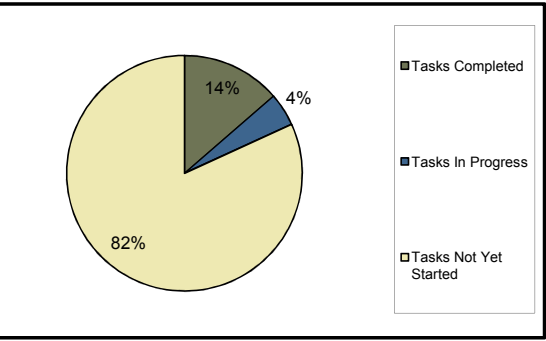
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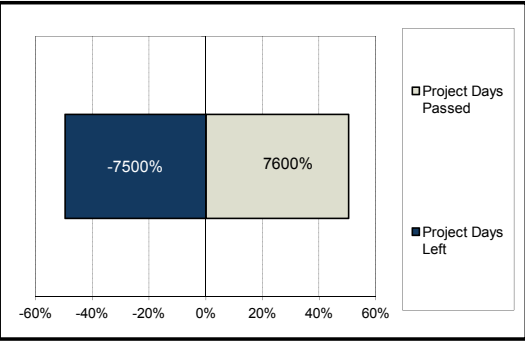
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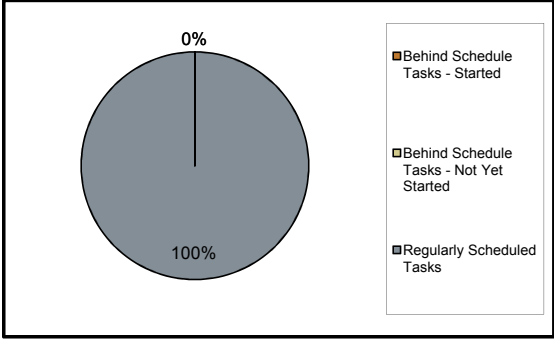


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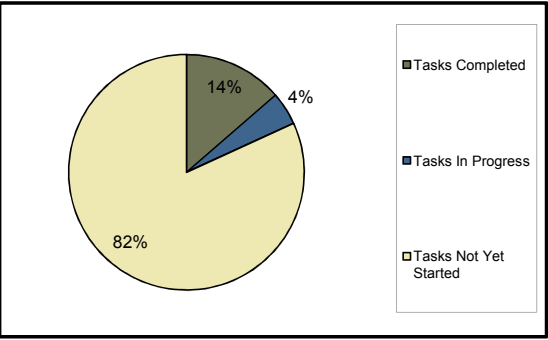
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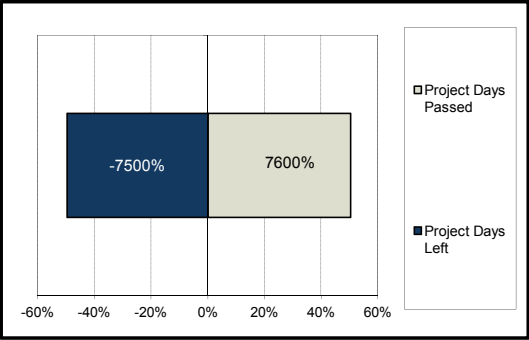
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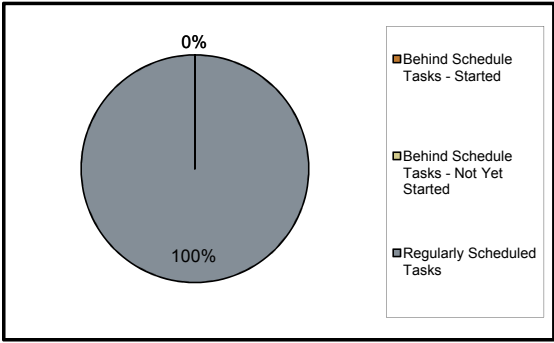


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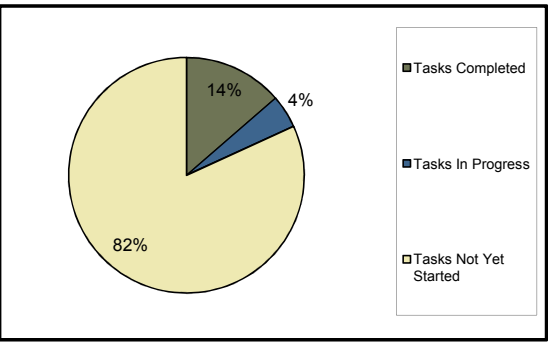
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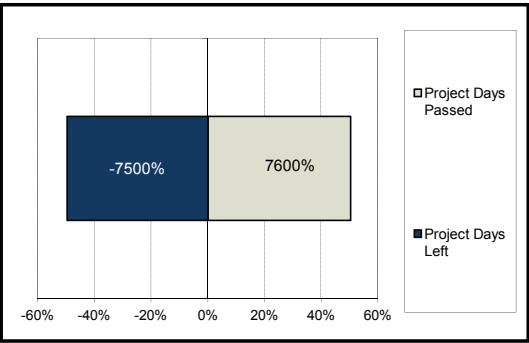
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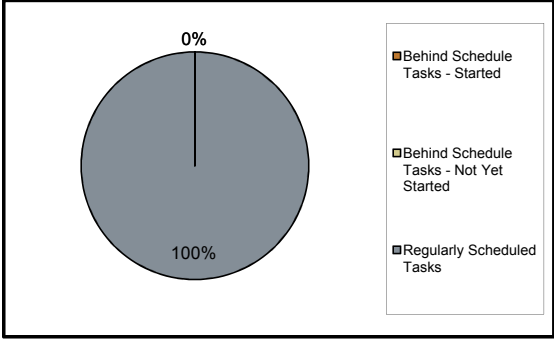


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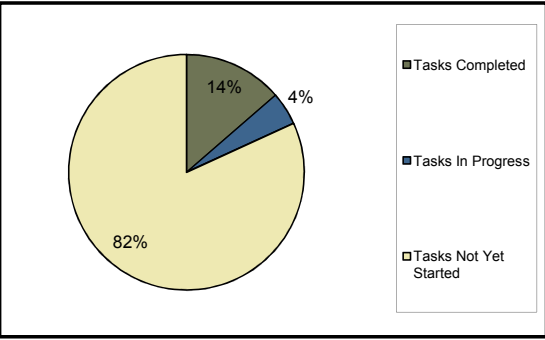
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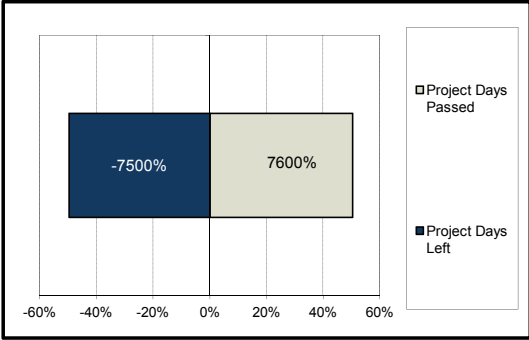
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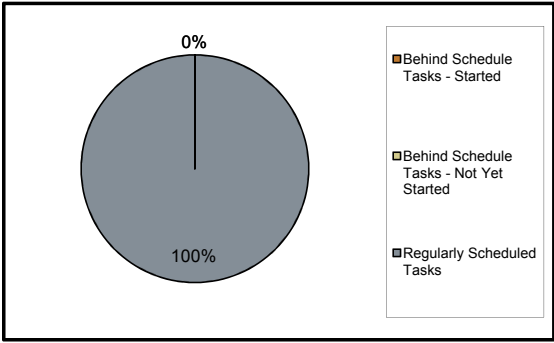


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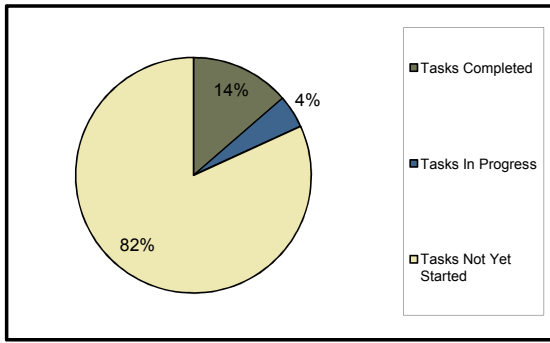
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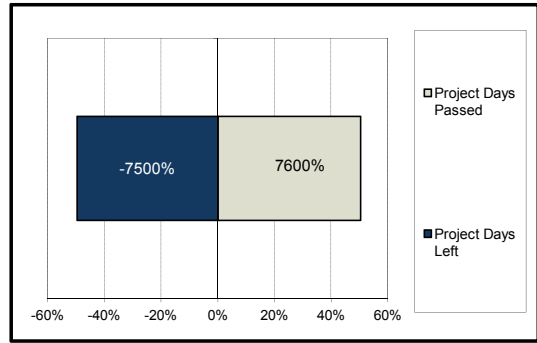
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