

Project Management Dashboard Pro v5 – Documentation

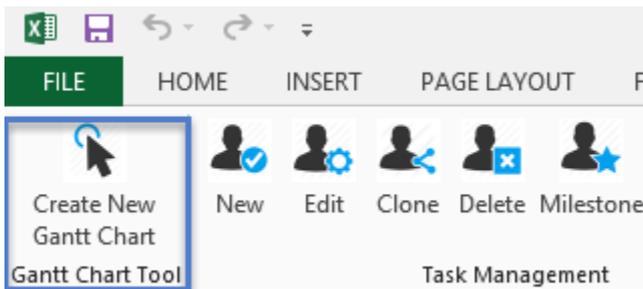
Installation

There is **NO** installation required. It's just a macro enabled excel file that opens if you have **Excel 2007, 2010, 2013 and 2016** on your Windows PC. Currently the Mac platform is not supported.

All you have to do is download and **save** the file on to your *PC* then **Open** the File and **Enable** Macros

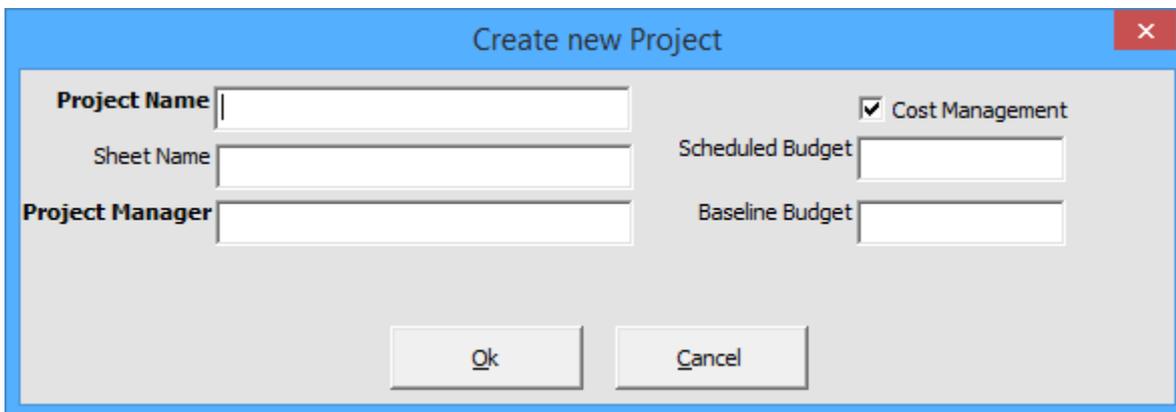
We have not use serial code, account activation or other frustrating things. No trial, registration, no hidden costs!

Open the file and click on Enable Macros then Create New Gantt chart icon on the ribbon.



How to Create A new Project?

To add a **Project or Gantt Chart**, click on the '**Add New Gantt Chart**' button on the ribbon.



This will open up a small popup to fill in the Project Information.

Project Name – Enter the Project Name

Sheet Name – The name of the excel worksheet that needs to be created. Don't use special characters and spaces

Project Manager – The name of the Project Manager

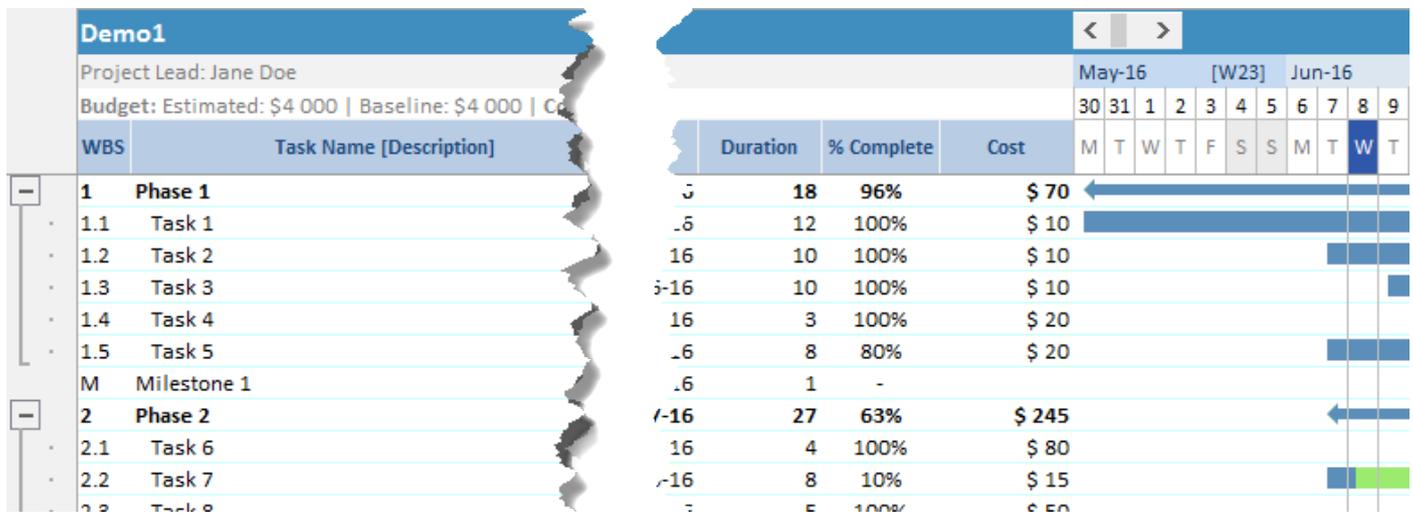
Cost Management (Optional) – Tick this box when your project needs to be tracked with costs. If you don't care about costs untick the box and Gantt Excel will disable all cost fields throughout the template. *You can change this option later as well.*

Scheduled (Estimated) Budget – Estimate of the total cost for the project

Baseline Budget – The original scheduled (estimated) budget should be inserted here and this should not preferably be changed. While the estimated budget may change over time the baseline budget should not be

changed. This gives management a fair idea as to what the original estimation was and helps them compare this with the Estimated Budget and the Actual costs of the project.

Click the OK button when you have entered all the information. As soon as you click the OK button a new excel worksheet with a Gantt chart timeline is magically created for you.



A default section and task is also added to give you a jump-start.

Edit Project Details

To edit the Project Details, double click the Project Name in the Gantt Chart. This will open up the Project Information popup. Make changes and click the Ok button.

Edit Project Details
✕

Project Name

Sheet Name

Project Manager

Cost Management

Scheduled Budget

Baseline Budget

Manage Project Costs

Our Gantt chart excel template allows users to track costs and expenditures for projects and tasks.

To best track costs, you should first create a budget by creating and entering cost values for budget resources that are assigned to the project.

While creating a new gantt chart worksheet you will be able to enter the budget costs associated with the project.

Create new Project

Project Name: Demo Project Cost Management

Sheet Name: Project1 Scheduled Budget: 30 000

Project Manager: John Doe Baseline Budget: 30 000

Ok Cancel

You can edit the project information at anytime by **double clicking** the name of your project and the same new project popup will open up. The Actual costs is automatically calculated by summing up all the actual costs of the tasks.

Manage Task Costs

Tasks are associated with three cost fields that can be used for planning and to track actuals.

2.2 - Task Details

Options

Task Name: Task 7

Resource: Andy Add Resource Rate: 240

	Start Date	End Date	Days	% Completed
Scheduled	07-Jun-2016	16-Jun-2016	8	10
Baseline	07-Jun-2016	16-Jun-2016	8	Copy from Scheduled
Actual				

Cost Management (Optional)

Scheduled: 15

Baseline: 15 Copy from Scheduled

Actual: 30

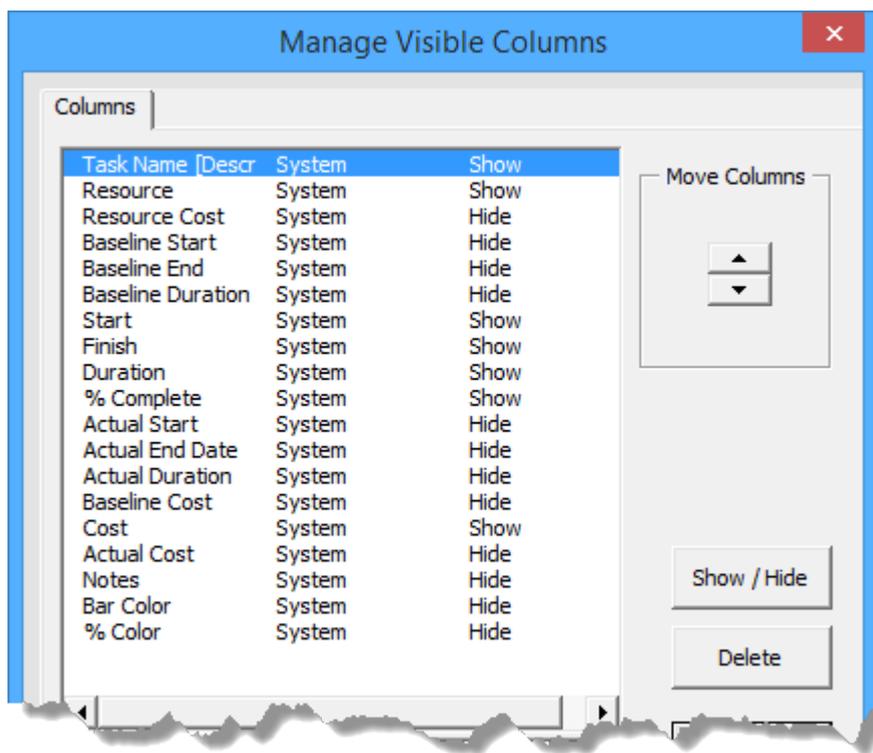
Comment:

Ok

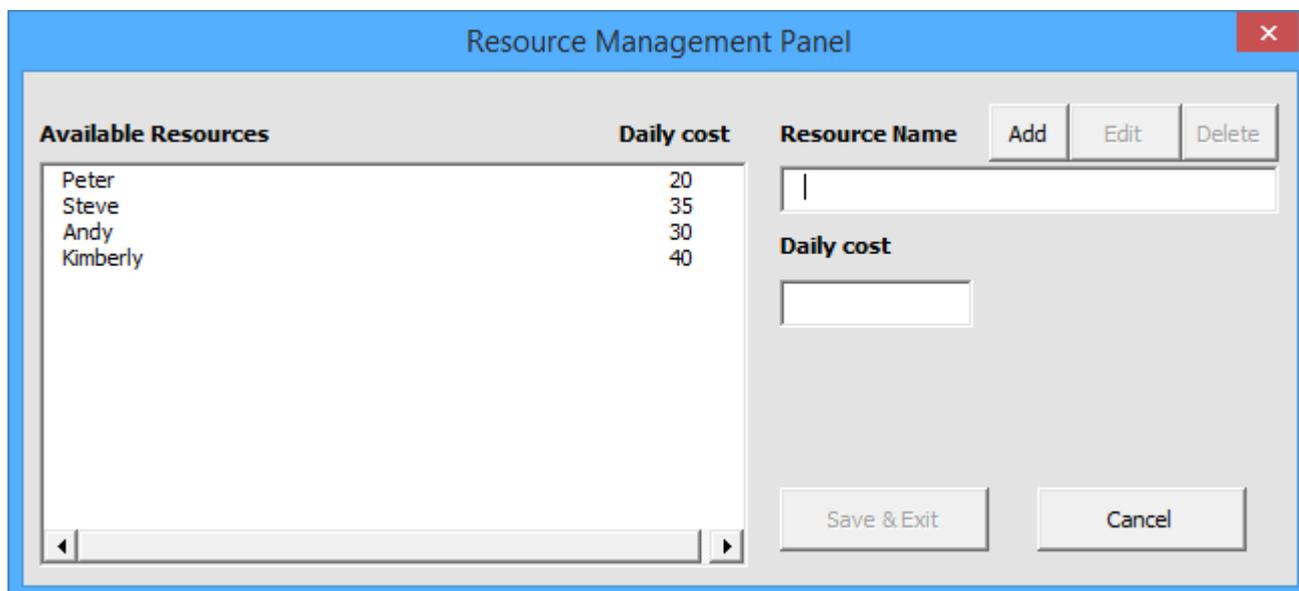
Scheduled (Estimated) Cost – The sum of planned costs of all expenses estimated for the task

Baseline Cost – When the ‘Copy from Estimated’ button is clicked the Estimated cost entered is saved into the Baseline. While the estimated cost may change often, the baseline cost should not be changed ideally.

Actual Cost – The actual cost of the task should be entered **after the task is completed**. To view the Cost columns in the grid you can un-hide the columns by clicking on the **Column Manager**.



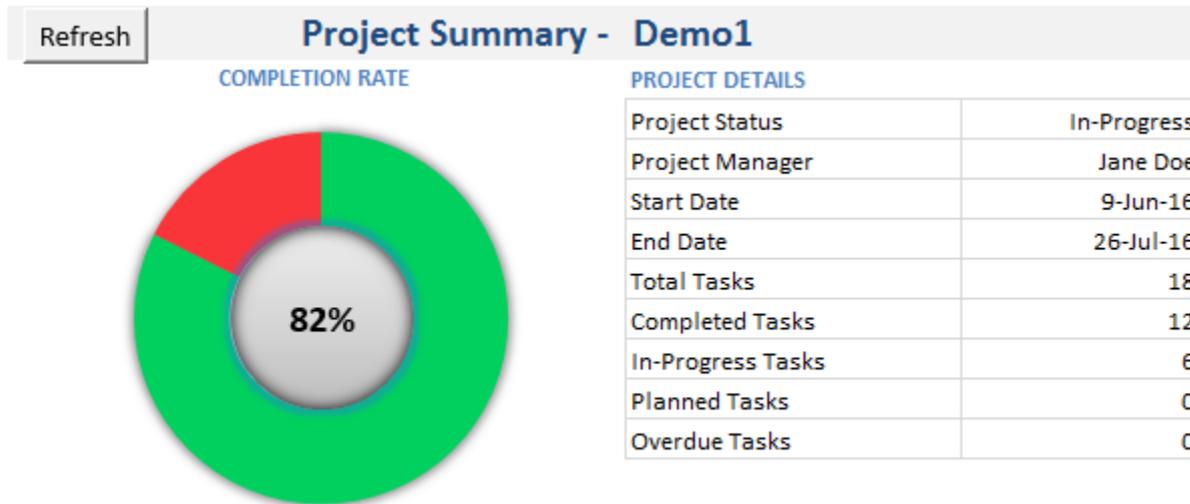
Tasks are also associated with Resource Cost. You can set resource cost by clicking on Add in the task form popup or by clicking Settings in the Gantt ribbon and then clicking on the Resources button. Resource Cost is calculated based on Resource Cost per day * Duration of task in days.



To view the Resource Cost column you can un-hide the column by clicking on the Settings icon in the ribbon and then un-hiding the column in the columns tab.

Project Dashboard Overview

The project dashboard provides a high level summary of the project costs. The first picture show us that the project is 82% complete and the project budget was set to \$3000 and that \$1205 has already been spent on it.



This second screenshot tells us that the sum of all tasks – baseline costs was set to \$3000 and that the estimated costs was probably revised from the originally set \$1040 to \$1249 It also tells us that \$1205 has already been spent.



We've used 4 another charts to overview statuses:

- Task Activity - Top 5 Tasks by Cost
- Task Activity - by % Complete
- Resources - Task Allocation by %
- Resource Activity - Task Completion %

Tasks

Tasks are the basic unit of action in Project Management Dashboard Pro. You can create tasks, assign them to yourself or others, set costs and dates for tracking and add notes for context.

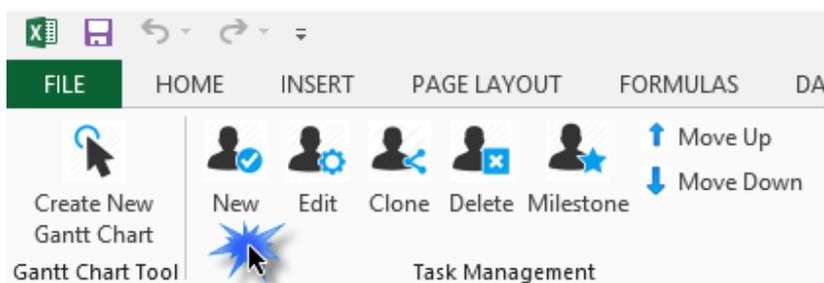
WBS	Task Name [Description]	Start	Finish	Duration	% Complete	Cost	M	T	W	T	F	S	S	M	T	W	T	F	S
1	Phase 1	30-05-16	22-06-16	18	96%	\$ 70													
1.1	Task 1	30-05-16	14-06-16	12	100%	\$ 10													
1.2	Task 2	07-06-16	20-06-16	10	100%	\$ 10													
1.3	Task 3	09-06-16	22-06-16	10	100%	\$ 10													
1.4	Task 4	10-06-16	14-06-16	3	100%	\$ 20													
1.5	Task 5	07-06-16	16-06-16	8	80%	\$ 20													
M	Milestone 1	18-06-16	18-06-16	1	-														
2	Phase 2	07-06-16	13-07-16	27	63%	\$ 245													
2.3	Task 8	21-06-16	27-06-16	5	100%	\$ 30													
2.4	Task 9	30-06-16	13-07-16	10	43%	\$ 100													
3	Phase 3	09-06-16	12-07-16	24	47%	\$ 644													
3.1	Task 10	09-06-16	17-06-16	7	20%	\$ 30													
3.2	Task 11	13-06-16	22-06-16	8	59%	\$ 200													
3.3	Task 12	14-06-16	20-06-16	5	55%	\$ 120													
3.4	Task 13	15-06-16	20-06-16	4	50%	\$ 30													
3.5	Task 14	16-06-16	29-06-16	10	40%	\$ 40													
3.6	Task 15	17-06-16	04-07-16	12	40%	\$ 60													
3.7	Task 16	18-06-16	01-07-16	10	100%	\$ 44													
3.8	Task 17	05-07-16	12-07-16	6	10%	\$ 120													

Create a Task

To create a task, simply type in the last row that contains the text “Type here to create a new task”
 This is fastest way to create a new task. As soon as you hit enter a new task is created and WBS automatically updates.

Demo1		
Project Lead: Jane Doe		
Budget: Estimated: \$4 000 Baseline: \$4 000 Cost: Estimated: \$959 Baseline:		
WBS	Task Name [Description]	Resource
3.6	Task 15	Kimberly
3.7	Task 16	Steve
3.8	Task 17	Peter
	Type here to create a new task	

Second method is to use the buttons in the Ribbon. You can also add a task in between tasks by selecting ‘New’ Task from the Task Management Panel.



Task Details Page

1.5 - Task Details

Options

Task Name: Task 5

Resource: Steve [Add] Resource Rate: 200

	Start Date	End Date	Days	% Completed
Scheduled	07-Jun-2016	16-Jun-2016	8	80
Baseline	07-Jun-2016	20-Jun-2016	10	Copy from Scheduled
Actual				

Cost Management (Optional)

Scheduled: 20

Baseline: 20 [Copy from Scheduled]

Actual: 20

Comment: Everythings is OK

Dependency Details

Options

Select Predecessor Task	Dependency Type	Gap (Days)

[Add] [Save] [Delete] [Clear]

Ok Cancel

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Task Name – is the name of the task

Resource – Can we used for Task Owners or resources like Rooms etc...

% Completed – Actual percentage completed for the task should be entered here.

Estimated Dates: Estimated dates are planned dates for when a scheduled task is planned to start or end

Estimated Start Date – The estimated date when the task should be started

Estimated End Date – Task Due date – The date by when the task should be completed

Estimated Duration – The difference between the estimated dates

Baseline Dates: Baseline dates are essentially a snapshot of the estimated dates when a task is created. While the estimated dates may change often, the baseline dates should not be ideally changed. It gives the stakeholders a fair idea as to when the task was originally supposed to start or end. Add the Baseline Start field to a task sheet when you want to compare baseline start dates to scheduled or actual start dates for tasks.

Baseline Start Date – A snapshot of the Estimated Start Date

Baseline End Date – A snapshot of the Estimated Start Date

Baseline Duration – The difference between the baseline dates

Actual Dates: Actual dates are the actual dates when the task was started and completed. They should be frequently updated to reflect task current status.

Actual Start Date – The actual date when the task was started

Actual End Date – The actual date when the task was completed

Actual Duration – (calculated automatically) – The actual numbers of days taken to complete the task.

The duration is automatically calculated if you enter the start date and end date and the end date.

Estimated Cost – Cost estimated for the task

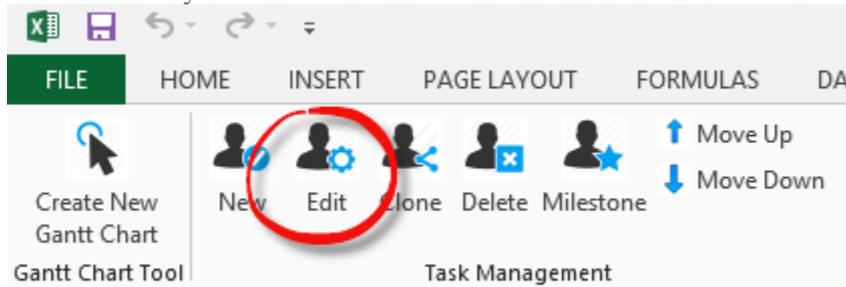
Baseline Cost – When the ‘Copy from Estimated’ button is clicked the Estimated cost is saved into the Baseline.

Actual Cost – The actual cost of the task should be entered after the task is completed.

Edit A Task

There are multiple ways to edit a task.

- You can edit the task fields in the spreadsheet itself. This option is the easiest.
- You can also **double click** the Task name in the Ribbon and this will open the Task Details popup
- Or click on any row that contains a task and click the Edit button.



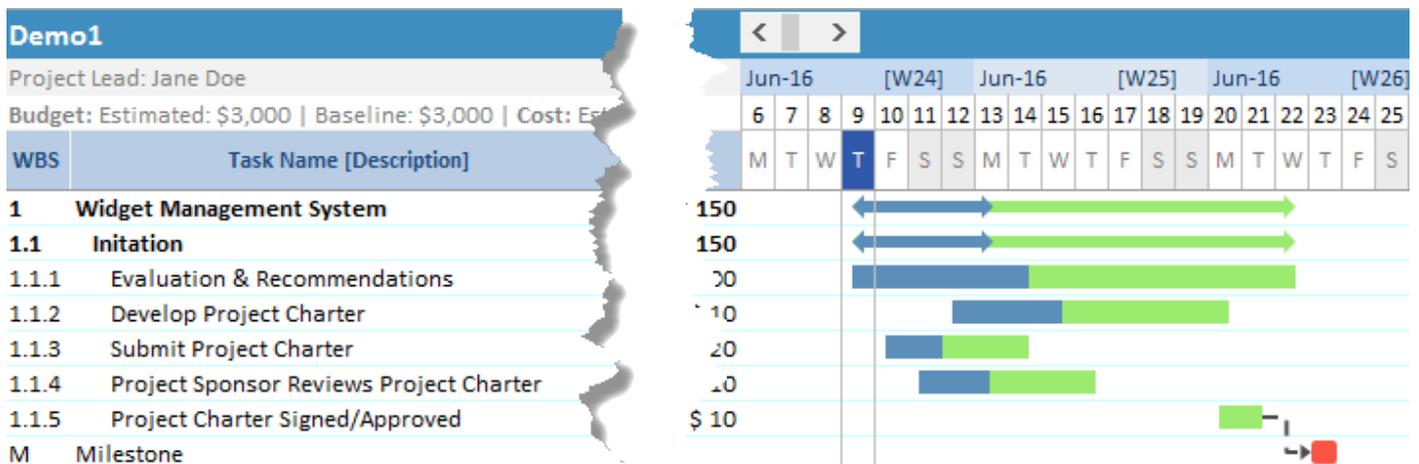
Relationships between Tasks

If a task is relatively large and requires several users with different skills to manage, break the task into subtasks and create parent-child relationships.

A child task should be a relatively smaller, manageable size of work. The parent task takes on the form of a summary task or rollup task for its child tasks.

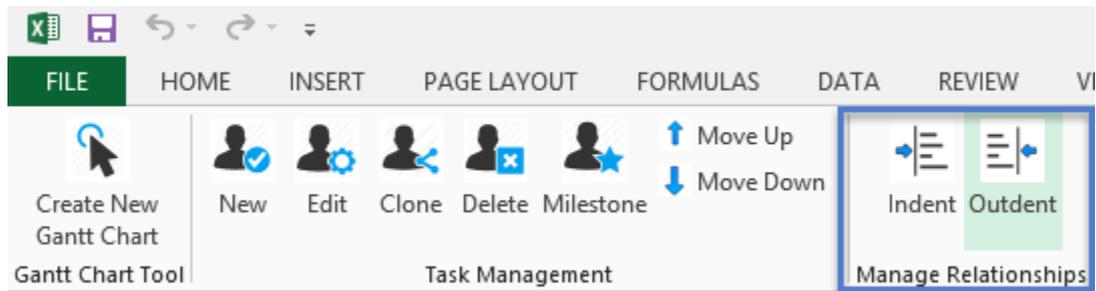
Planned start date and Planned end date rollup occurs when you create child tasks: the duration of the parent automatically adjusts to cover its child tasks. A parent-child relationship is different from a dependency relationship. In a dependency, one task must finish before another begins.

In a parent-child relationship, any number of tasks can be nested under a parent task with or without any dependencies.



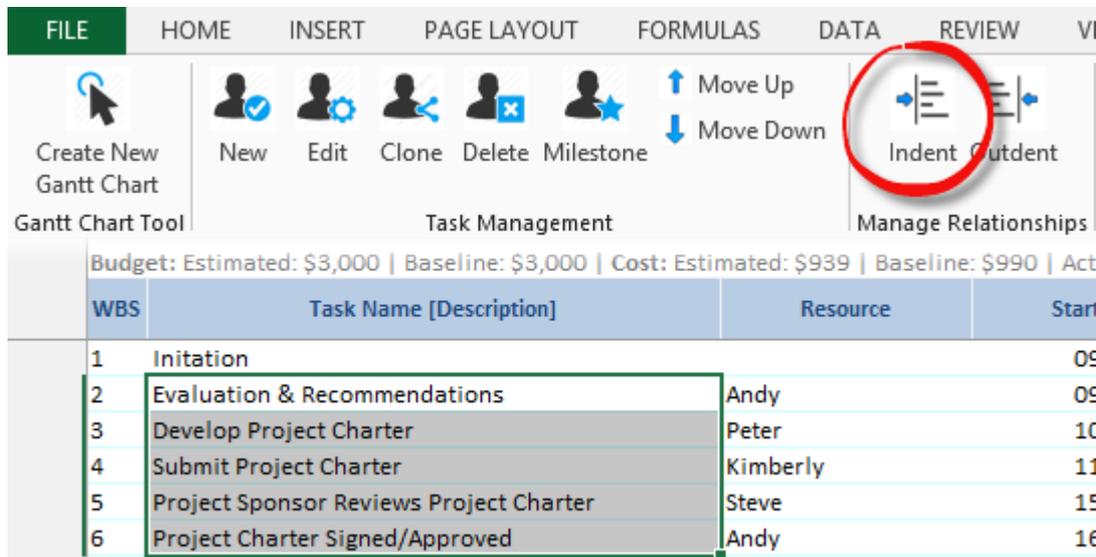
Creating a Parent-Child Task Relationship

To set parent-child relationships, select a task that you want to convert to a child task and click on the **Indent** button. To create a parent task from a child task click on the **Outdent** button.



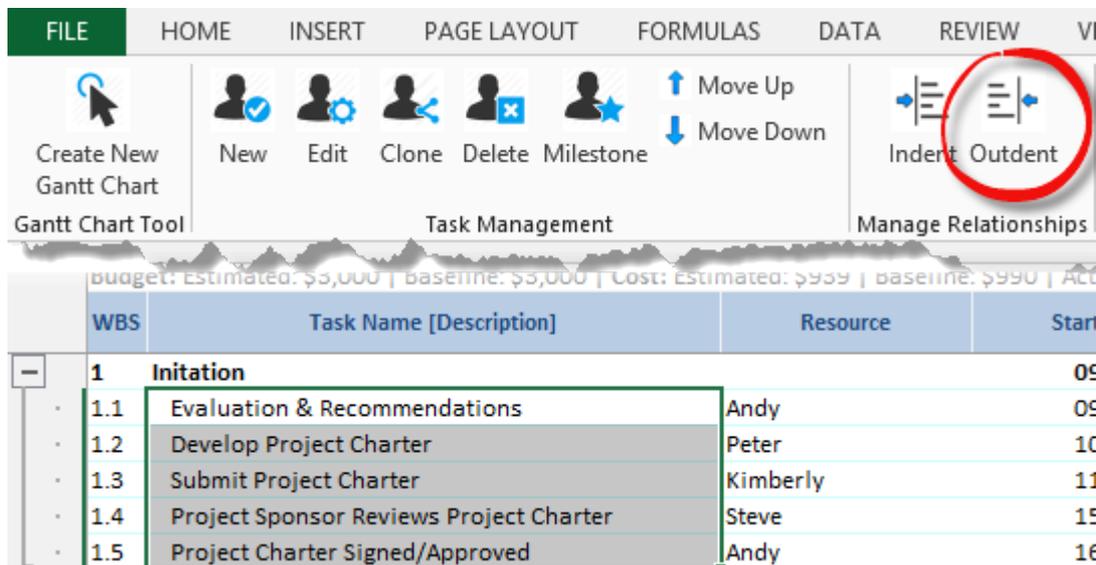
Create Child Task

Just select the sub task and click to **Indent** icon on the ribbon.



Back To Parent Task

You have to select tasks and click to **Outdent** icon on the ribbon.



Task Dependencies

Setting dependencies between tasks is the most powerful feature of **Project Management Dashboard Pro**.

The built-in auto-scheduling module is able to update the dates of tasks based on changes that are made to its dependent tasks.

The screenshot displays the software interface. On the left, the 'Task Management' pane shows a project named 'Demo2' with a lead of 'Jane Doe' and a budget of '\$0'. A Work Breakdown Structure (WBS) is listed with tasks 1.1 through 1.4 under 'Phase 1'. On the right, a Gantt chart shows a timeline from May 16 to June 20. A task bar is highlighted in blue, showing a 21% completion rate. The chart includes a grid for weeks and days, and a progress bar with a blue segment indicating the current status.

Definition of Task Dependency

Task Dependency is a relationship in which a task or milestone relies on other tasks to be performed (completely or partially) before it can be performed. It's very important to understand the types of dependencies that can be used in **Project Management Dashboard Pro**.

The template supported the following 4 types of task dependencies:

1. **Finish-to-Start (FS)**
2. **Start-to-Start (SS)**
3. **Finish-to-Finish (FF)**
4. **Start-to-Finish (SF)**

Finish-to-Start (FS):

This is the most often used type of dependency between tasks. This dependency (relationship) means that if there are two tasks Task 'A' and Task 'B', then TASK A (FS) B means that, the dependent task (B) cannot begin until the task that it depends (A) on is complete. In other words if TASK A is delayed by a day, then TASK B will also be delayed and will begin a day later. **Example:**



Start-to-Start (SS):

This dependency means that if there are 2 tasks TASK A and B, Task B can't start until Task A starts. They don't have to start at the same time: Task B can begin any time after Task A begins. **Example:** Road excavating must start before Asphalt can be laid.



Finish-to-Finish (FF)

This dependency means that if there are 2 tasks TASK A and B, Task B can't finish until Task A is completed. Predecessor must finish before Successor can finish. **Example:** Until *Asphalting* (Task A) gets done, you won't be able to finish *Line Painting* (Task B).



Start-to-Finish (SF)

Task B can't finish until Task A begins. Task B can finish any time after Task A begins. This type of link is rarely used. **Example:** Road excavating must start before line painting can be completed.

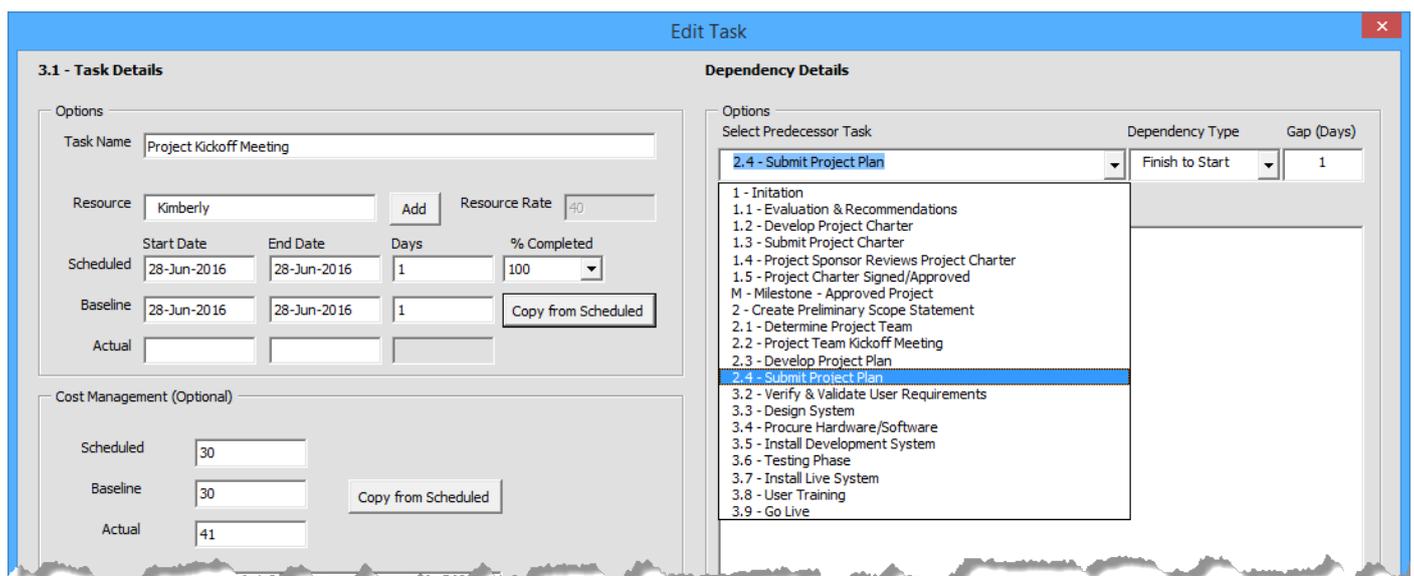


Gap is a time interval, can be set between dependent tasks to allow for required delays.

Creating a Task Dependency

The easiest way to create a task dependency is to **double click** a task and then set dependencies from the right pane.

1. Click on the **dropdown** under Predecessor – Task name and **select** the predecessor task, set the **dependency type** and **lag**.
2. Click the **Add** button to add the dependency and click **Ok** to finish. A task dependency is set instantly.



3.1 - Task Details
Dependency Details

Options

Task Name:

Resource: Resource Rate:

	Start Date	End Date	Days	% Completed
Scheduled	<input type="text" value="28-Jun-2016"/>	<input type="text" value="28-Jun-2016"/>	<input type="text" value="1"/>	<input type="text" value="100"/>
Baseline	<input type="text" value="28-Jun-2016"/>	<input type="text" value="28-Jun-2016"/>	<input type="text" value="1"/>	<input type="button" value="Copy from Scheduled"/>
Actual	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Cost Management (Optional)

Scheduled:

Baseline:

Actual:

Options

Select Predecessor Task:

Dependency Type:

Gap (Days):

Predecessor Task	Dependency Type	Gap (Days)
2.4 - Submit Project Plan	Finish to Start	1

- 2.4 Submit Project Plan
- 3 Execution
- 3.1 Project Kickoff Meeting



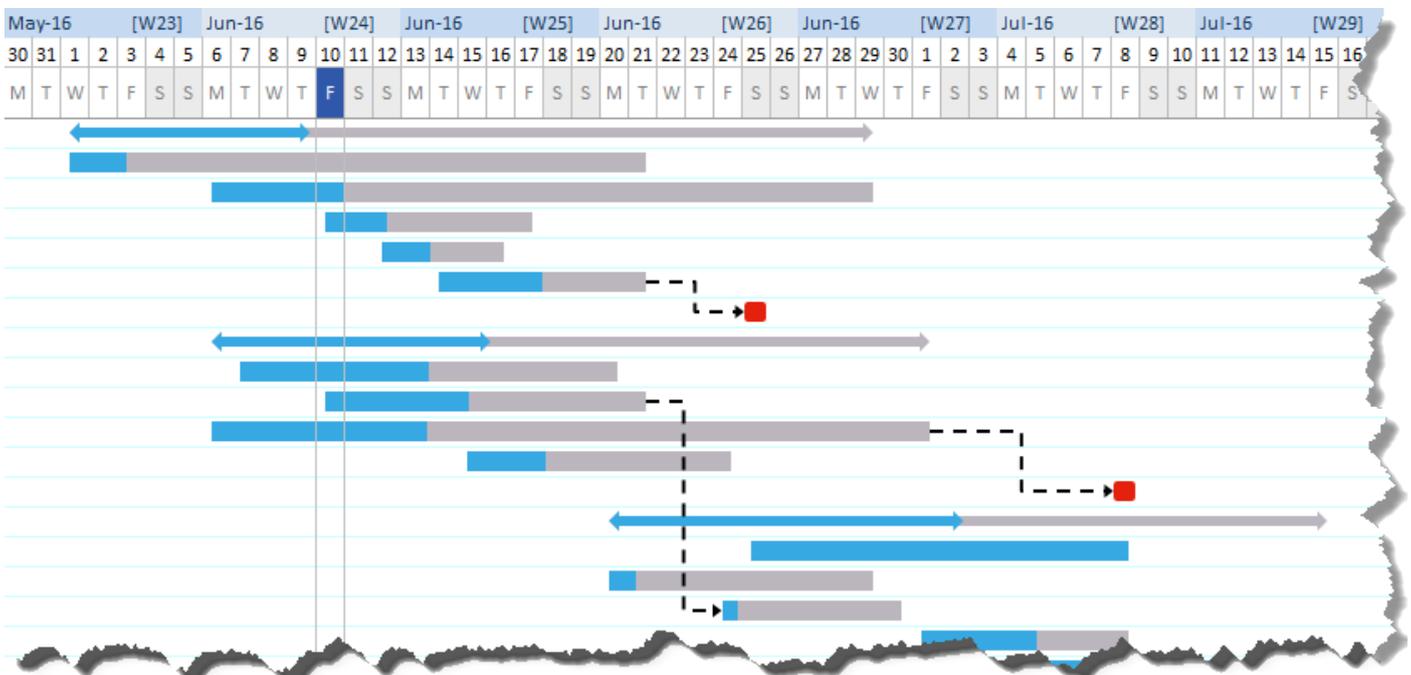
Modifying Task Dependency

To modify a task dependency just **double click** a task and then you can add/ edit or delete existing dependencies.

To edit a dependency, select the task dependency and click the edit button. Click the Save button when you finish. To delete a dependency, select the task dependency and click the delete button.

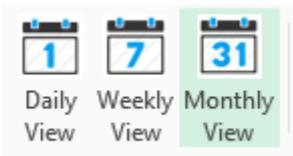
TimeLine

In addition to the grid portion of the template, the Gantt Chart timeline view also provides an illustrated version of your task list, with Gantt bars that show the duration of your project's tasks across a timeline. For each task, the associated Gantt bar begins at the start date, and ends at the finish date.



TimeLine View Setup

The timeline can be viewed in three different views so it can be useful for large projects.



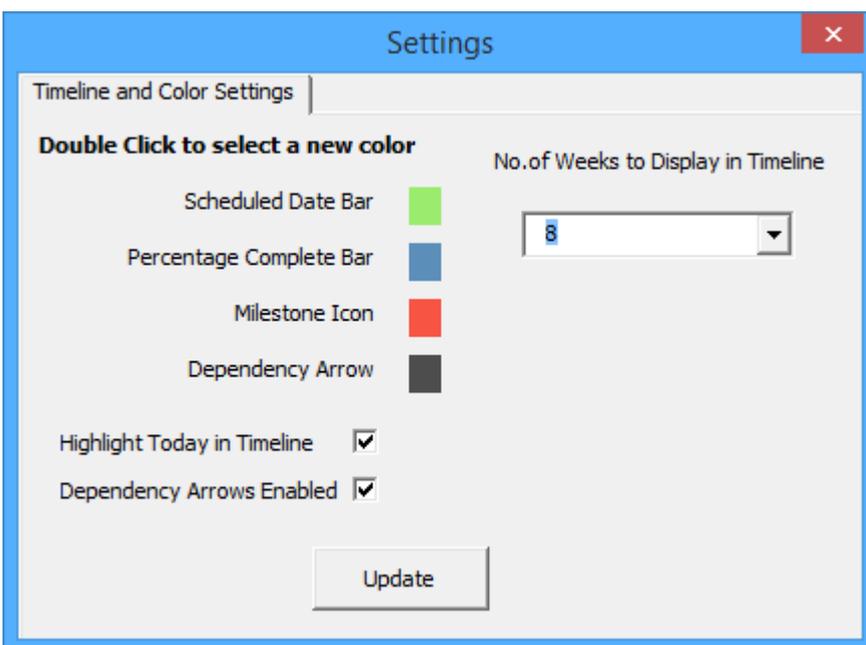
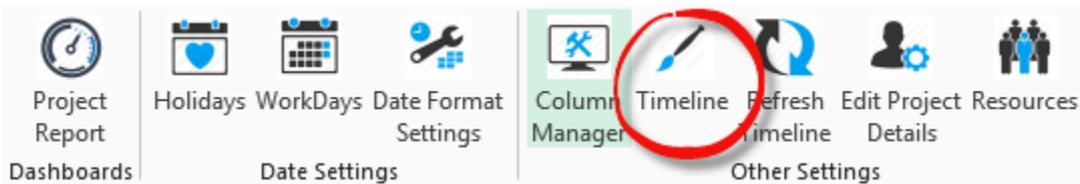
Customize the TimeLine Colors

The timeline gantt bars are made of two colored shapes.

1. One colored shape that represents the beginning to end of the task.
2. The second colored shape that overlays the task shape to represent the percentage of task completion.

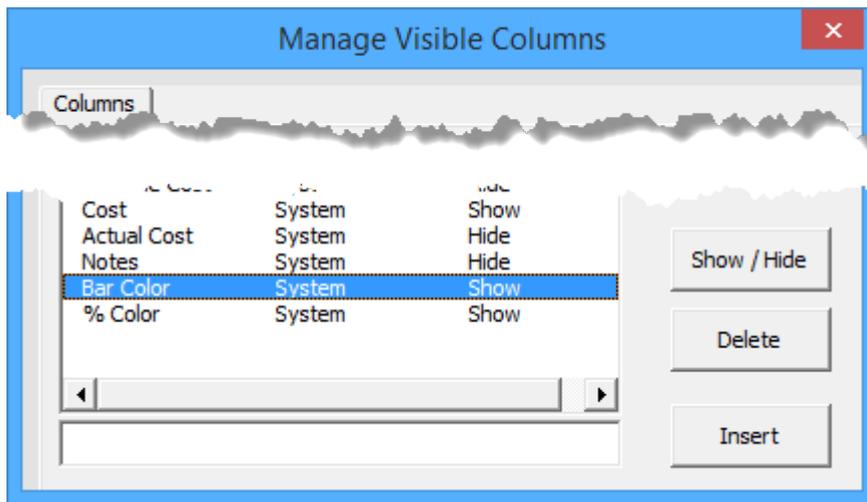
Gantt Bar Colors

Default colors can be changed across the sheet by clicking on the **Settings** button in the ribbon and selecting the **Timeline** tab. From here double click the default green colors to any color of your choice and click the **Update** button.

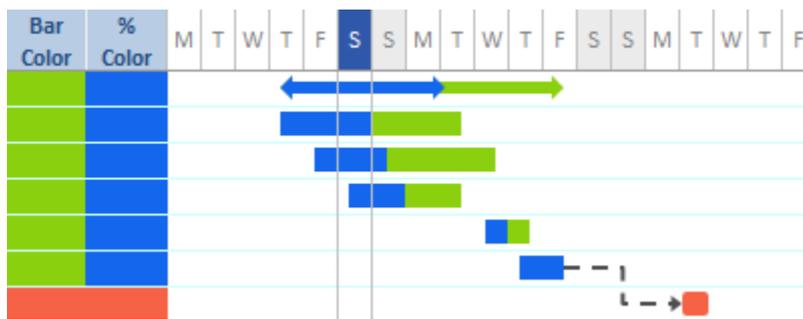


Changing Colors of Individual Sections & Tasks

You can change the color of each individual section or task.



To do this, click on the **Settings** button in the **ribbon** and select the **Columns** tab. **Un-hide** the columns “Bar Color” & “% Color” and **close** the settings popup.



You can multi-select the cells, Use the “**Fill**” option in the Home tab of Excel then select **Refresh Timeline icon on the Ribbon**. This will update all the gantt bars instantly.

