

# Project Task Tracking

PRINT

## Project Task Tracking

### 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 section's 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:

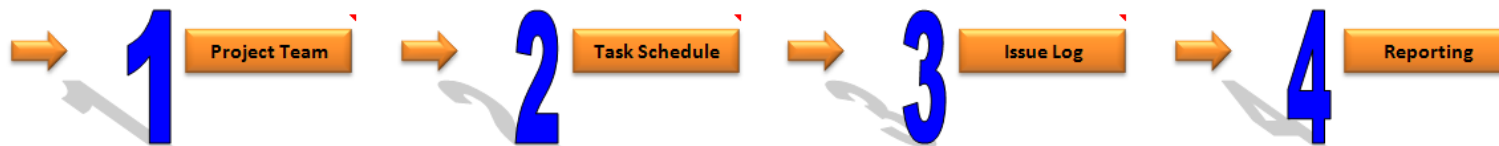
1. Ensure that the fields in MS Project are altered to match this tool. The order should be: Task Name, Start, Finish, and Resource Names.
2. Once pasted into this tool's Tab 2, reformat the start and finish columns to use a date format (within the Format menu, choose "Cells..." and select the desired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



# Project Task Tracking – Project Team

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## Project Team

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

<b>Project Name</b>	PMO Implementation
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<b>Estimated Project Start Date</b>	May 1, 2012
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<b>Estimated Project End Date</b>	October 1, 2012
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<b>Project Manager Name</b>	Mike McCormick
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If you don't have the Excel Date Picker add-in, you can download it which will eliminate typing in the dates.

**Date Picker Add-in:**

<http://officeblogs.net/excel/samra>

After downloading the add-in, stick it in your XLSTART folder (mine is at C:\Program Files\Microsoft Office\OFFICE12\XLSTART) and restart Excel for it to load.

### 1. Project Team Members, Task Groups & Stakeholders

<b>Name</b>
Mike McCormick
John Doe
Mike and John
John Smith
Kim Lee
Chris Johnson
Alex Singh
Research Department
HR Team

### 2. Holidays / Time Off Project

<b>Date</b>	<b>Holiday</b>
4/6/2012	Good Friday
4/8/2012	Easter Monday
5/14/2012	All Day Dept Meeting April
7/4/2012	US Independence Day
7/2/2012	Non-Project Work Day
9/3/2012	Labor Day
11/12/2012	Veterance's Day' observed
11/22/2012	US Thanksgiving
12/25/2012	Christmas Day
1/1/2012	New Year's Day

# Project Task Tracking – Task Schedule

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## Project Schedule


### IMPORTANT NOTICE:

It is very important that the following actions are followed:  
 - Tasks must be entered with unique names. If task names are repeated, the data will not carry over correctly. Name each task differently.  
 - Task Owner must be selected from the drop down menu. If unique names are entered, the report data will not carry over correctly.

### IMPORTANT NOTICE REGARDING MACROS:

Do NOT Insert or Delete any rows within the Schedule, otherwise you will cause calculation errors.

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

Project Task Information							Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	W																																			
Project Task	Estimated Start Date	Estimated Completion Date	Task Owner <i>MUST USE DROP DOWN MENU</i>	Actual Start Date	Actual Completion Date	Comments	30-Apr	7-May	14-May	21-May	28-May	4-Jun	11-Jun	18-Jun	25-Jun																																				
							30	1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30	1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	25	26	27	28	29	3
							H	T	W	T	F	H	T	W	T	F	H	T	W	T	F	H	T	W	T	F	H	T	W	T	F	H	T	W	T	F	H	T	W	T	F	H	T	W	T	F	H	T			
<b>Project Feasibility Study</b>	4/23/2012	5/1/2012	Mike McCormick	4/23/2012	5/3/2012																																														
New Project Sample Task	5/14/2012	5/18/2012	Kim Lee	5/15/2012																																															
Cost Benefit Analysis	5/21/2012	5/25/2012	Mike and John																																																
Project Definition	6/6/2012	6/8/2012	Kim Lee																																																
Assign Resources	6/8/2012	6/11/2012	Mike McCormick																																																
Create Project Plan	6/8/2012	6/18/2012	Mike McCormick																																																
Create Communications Plan	6/18/2012	6/25/2012	Kim Lee																																																
Project Kick-Off Meeting	6/26/2012	6/26/2012	Mike McCormick																																																
Create Phase 1 Plan and Definition	6/27/2012	7/3/2012	Mike McCormick																																																
Phase 1 Execution Kick-Off	7/5/2012	7/5/2012	Mike McCormick																																																
Communicate Phase 1 Progress	7/13/2012	7/13/2012	John Doe																																																
Change Control Processes	7/13/2012	7/27/2012	Mike and John																																																
<b>Close Phase 1</b>	7/30/2012	7/31/2012	Mike McCormick																																																
Create Phase 2 Plan and Definition	8/1/2012	8/10/2012	Chris Johnson																																																
Phase 2 Execution Kick-Off	8/13/2012	8/13/2012	Chris Johnson																																																
Communicate Phase 2 Progress	8/17/2012	8/17/2012	Chris Johnson																																																
Change Control Processes	8/20/2012	8/31/2012	Chris Johnson																																																
<b>Close Phase 2</b>	9/3/2012	9/3/2012	Mike McCormick																																																
Project Delivery	9/4/2012	9/7/2012	Research Department																																																
Project Closure Meeting	9/10/2012	9/10/2012	Mike McCormick																																																
Performance Appraisal	9/11/2012	9/14/2012	Mike McCormick																																																
Project Feedback Form	9/17/2012	9/21/2012	Kim Lee																																																
<b>Project Debrief Report</b>	9/28/2012	9/28/2012	Mike McCormick																																																

# Project Task Tracking – Issue Log

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## Issue Log

Item	Date	Issue	Comments	Resolution	Date Closed	Risk Level	Assigned To
1	5/3/2012	Sample Issue			5/3/2012	1	
2							
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# Project Task Tracking – Project Status Reporting

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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. **NOTE:** When you enter the Task's actual completion date is then removed from the report.

## IMPORTANT NOTICE:

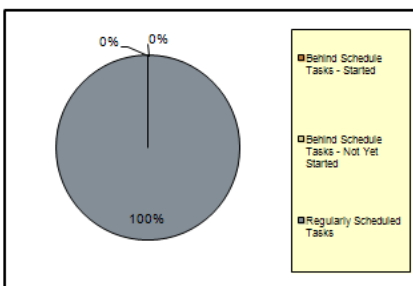
Task owner names must be selected from the drop down menus in Tabs 2 and 3 in order for this reporting page to work correctly. If errors occur on this page, return to the project planning stage and ensure that task owner names were selected from the menus, rather than typed in manually.

## Progress Report

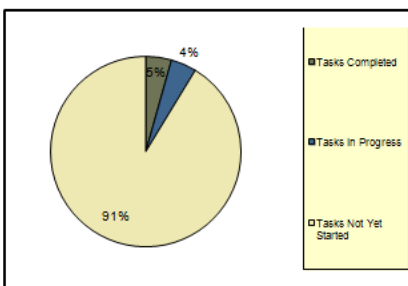
Enter Date to Start Progress Report:

Enter Date to End Progress Report:

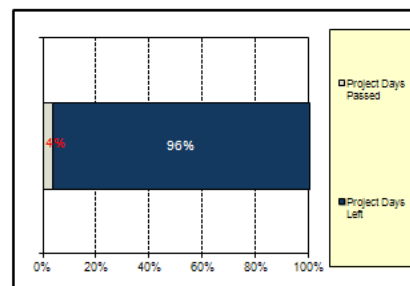
Analysis of On-Schedule Tasks to D



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
Mike McCormick	Assign Resources	Task Not Yet Started	June 11, 2012	Task is scheduled for work during this timeframe.
	Create Project Plan	Task Not Yet Started	June 18, 2012	Task is scheduled for work during this timeframe.
	Project Kick-Off Meeting	Task Not Yet Started	June 26, 2012	Task is scheduled for work during this timeframe.
	Create Phase 1 Plan and Definition	Task Not Yet Started	July 3, 2012	Task is scheduled for work during this timeframe.
	Phase 1 Execution Kick-Off	Task Not Yet Started	July 5, 2012	Task is scheduled for work during this timeframe.
	Close Phase 1	Task Not Yet Started	July 31, 2012	Task is scheduled for work during this timeframe.
	Close Phase 2	Task Not Yet Started	September 3, 2012	Task is scheduled for work during this timeframe.
	Project Closure Meeting	Task Not Yet Started	September 10, 2012	Task is scheduled for work during this timeframe.
	Performance Appraisal	Task Not Yet Started	September 14, 2012	Task is scheduled for work during this timeframe.
Kim Lee	Project Debrief Report	Task Not Yet Started	September 28, 2012	Task is scheduled for work during this timeframe.
	New Project Sample Task	Task In Progress	May 18, 2012	Task is scheduled for work during this timeframe.
	Project Definition	Task Not Yet Started	June 8, 2012	Task is scheduled for work during this timeframe.
	Create Communications Plan	Task Not Yet Started	June 25, 2012	Task is scheduled for work during this timeframe.
	Project Kick-Off Meeting	Task Not Yet Started	June 26, 2012	Task is scheduled for work during this timeframe.