

TASK MANAGER (ADVANCED) EXCEL TEMPLATE v2

PURPOSE

Task Manager Excel template allows one to easily create, assign and manage tasks

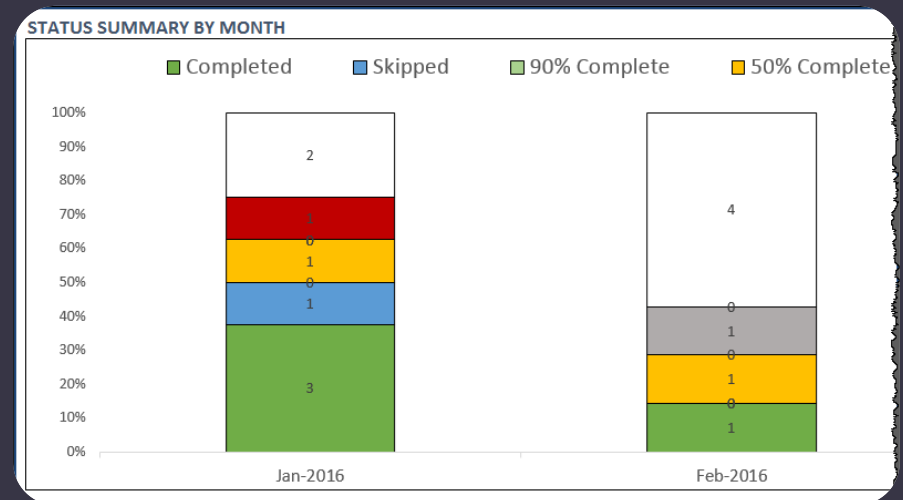
- Save time by automatically create recurring tasks
- Customize to suit your needs (status tracking values, holidays, weekends)
- Automated reporting
- Easy, Simple and Quick
- All within Excel

REQUIREMENTS

- Microsoft Excel for Windows (2010 & above); Excel for Mac (2011 & above)

MORE DETAILS

<http://indzara.com/product/task-manager-advanced/>



FEATURES

✓ Time saving features

- One-time and recurring tasks
- Automatically create recurring tasks (12 Frequency types)
- Assign recurring task to a resource once

✓ Automated Reporting

- Built-in Calendar of tasks
- Summary Report of distribution & trends
- Detailed Report of all occurrences

✓ Customize to suit your needs

- Choose Weekends & Holidays
- Set 7 status tracking values
- 100 active tasks & 1200 active occurrences
- Custom Columns

✓ Simple, easy and quick

- Easy and simple data entry
- Print-ready Dashboard & Report
- Export to PDF

TIME SAVING FEATURES – ONE-TIME AND RECURRING TASKS

Create one-time and recurring tasks easily

Supports 12 frequency types.

Task occurrences are generated automatically.

The following frequency types are available

FREQUENCY TYPE	DEFINITION
One-time	Only one occurrence on a specific date
Daily	Occurrence(s) daily
Weekly	Occurrence(s) every week
Monthly	Occurrence(s) every month on the same day
Nth Wkday of Mth	Occurrence(s) every Nth Weekday of Month
Last Wkday of Mth	Occurrence(s) on Last Weekday of Month
Last day of Mth	Occurrence(s) on Last day of Month
Every Nth Busn day	Occurrence(s) every Nth Business day
Nth Busn day of Mth	Occurrence(s) on Nth Business day of Month
Last Busn day of Mth	Occurrence(s) on Last Business day of Month
Nth Busn day of Week	Occurrence(s) on Nth Business day of Week
Last Busn day of Week	Occurrence(s) on Last Business day of Week

CUSTOMIZE TO SUIT YOUR NEEDS

Customize easily to suit your unique needs

SET STATUS VALUES

1. ENTER PERIOD START

1-Jan-2016

2. SET STATUS VALUES

Set your status values. Choose whether they should be considered as pending.

STATUS	PENDING OR NOT	PRESET COLOR
Completed	NO	Green
Skipped	NO	Blue
90% Complete	YES	Light Green
50% Complete	YES	Yellow
10% Complete	YES	Orange
On Hold	YES	Grey
Unknown	YES	Red

Colors cannot be modified

CHOOSE WEEKENDS

3. NON-BUSINESS DAYS

Choose days which you would like to consider as non-business days.

WEEKENDS

SAT & SUN

HOLIDAYS

DATE

SAT & SUN
SUN & MON
MON & TUE
TUE & WED
WED & THU
THU & FRI
FRI & SAT
SUN

ENTER HOLIDAYS

HOLIDAYS

DATE

HOLIDAY NAME

07-Jan-2016

Company Holiday

08-Jan-2016

Offsite

AUTOMATED REPORTING – DASHBOARD

PENDING OCCURRENCES

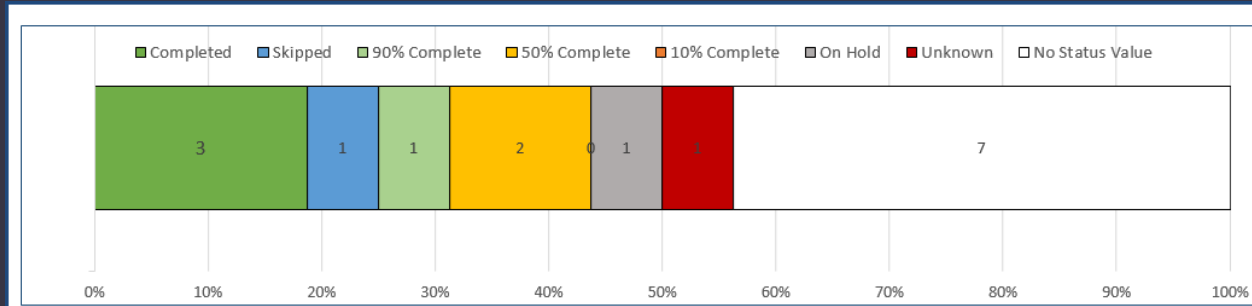
PENDING TASK OCCURRENCES				
TODAY 30-Jan-2016				
PENDING TASK OCCURRENCES 4				
TASK NAME	DUE DATE	RESOURCE	PRIORITY	
Weekly update	25-Jan	VALLUVAR	M	
Month-end Meeting	29-Jan	BHARATHI	H	
Daily Meet	28-Jan	VALLUVAR		
Daily Meet	29-Jan	VALLUVAR		

CALENDAR VIEW

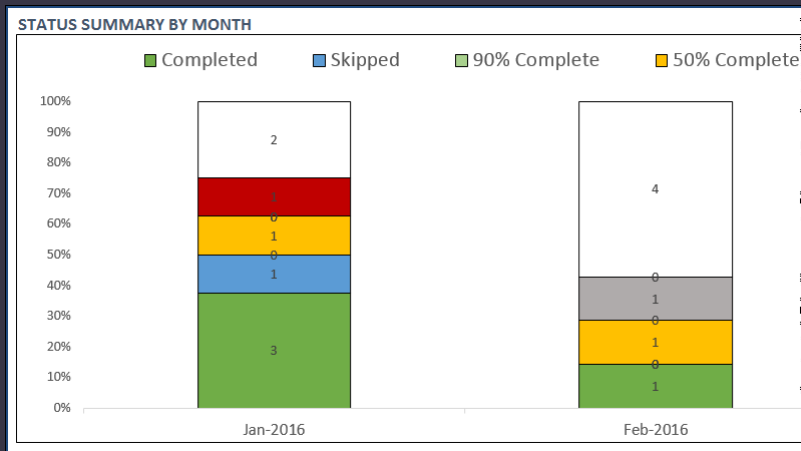
CALENDAR VIEW				
FROM 25-Jan-16				
25-Jan	26-Jan	27-Jan	28-Jan	29-Jan
<i>Mon</i>	<i>Tue</i>	<i>Wed</i>	<i>Thu</i>	<i>Fri</i>
<div style="background-color: orange; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Weekly update <div style="background-color: green; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Daily Meet	<div style="background-color: green; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Daily Meet	<div style="background-color: blue; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Daily Meet	<div style="background-color: green; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Daily Meet	<div style="background-color: red; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Month-end Meeting <div style="background-color: orange; width: 10px; height: 10px; display: inline-block; margin-right: 5px;"></div> Daily Meet

AUTOMATED REPORTING – DASHBOARD

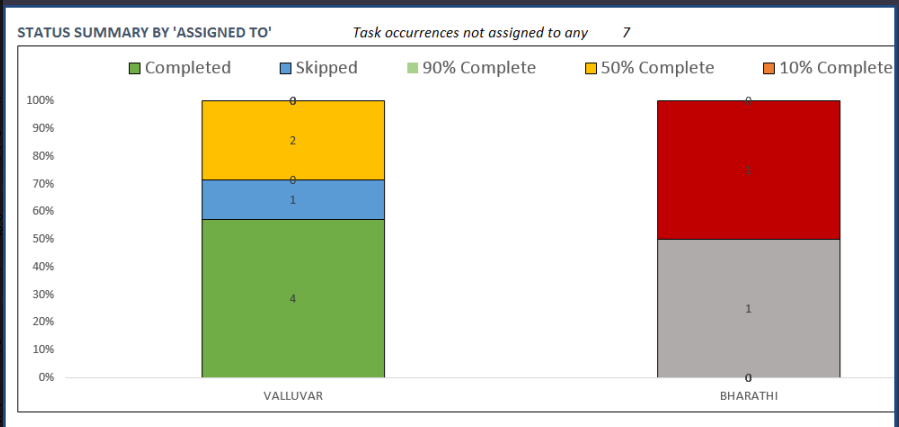
DISTRIBUTION OF STATUS



STATUS DISTRIBUTION BY MONTH



STATUS DISTRIBUTION BY RESOURCE



AUTOMATED REPORTING – TASK OCCURRENCE REPORT

View all task occurrences in one report

Filter to view only pending ones

TASK OCCURRENCE REPORT				PLEASE DO NOT SORT THIS TABLE BELOW. PLEASE DO NOT INSERT/DELETE			
				TODAY	30-Jan-2016		
YOU CAN USE FILTERS TO NARROW DOWN DATA. CHOOSE TRUE IN PENDING FIELD TO VIEW ALL PENDING TASK OCCURRENCES.							
TASK ID	TASK NAME	DUE DATE	STATUS	PRIORITY	RESOURCE	COMPLETED DATE	PENDING
1	Weekly update	11-Jan-2016	Completed	M	VALLUVAR	05-Jan-2016	FALSE
1	Weekly update	25-Jan-2016	50% Complete	M	VALLUVAR		TRUE
1	Weekly update	01-Feb-2016					FALSE
2	Month-end Meeting	29-Jan-2016	Unknown	H	BHARATHI		TRUE
2	Month-end Meeting	29-Feb-2016	On Hold	H	BHARATHI		FALSE
2	Month-end Meeting	31-Mar-2016					FALSE
2	Month-end Meeting	29-Apr-2016					FALSE
3	Daily Meet	25-Jan-2016	Completed		VALLUVAR		FALSE
3	Daily Meet	26-Jan-2016	Completed		VALLUVAR		FALSE
3	Daily Meet	27-Jan-2016	Skipped		VALLUVAR		FALSE
3	Daily Meet	28-Jan-2016					TRUE
3	Daily Meet	29-Jan-2016					TRUE
3	Daily Meet	01-Feb-2016					FALSE
3	Daily Meet	02-Feb-2016	Completed		VALLUVAR		FALSE
3	Daily Meet	03-Feb-2016	50% Complete		VALLUVAR		FALSE
3	Daily Meet	04-Feb-2016					FALSE
3	Daily Meet	05-Feb-2016					FALSE

MORE DETAILS

Product Page:

<http://indzara.com/product/task-manager-advanced/>

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