

# PROJECT MANAGER

EXCEL TEMPLATE V2

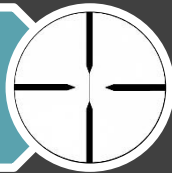
**SIMPLE**

[WWW.INDZARA.COM](http://WWW.INDZARA.COM)

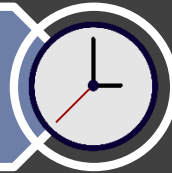
**EFFECTIVE**

# PURPOSE

SCOPE



SCHEDULE



COST



RESOURCE



Plan and manage a project effectively and efficiently from start to finish

# HIGHLIGHTS

## COMPREHENSIVE

PLAN AND MANAGE  
COMPARE PLAN VS BASELINE

## AUTOMATED

SCHEDULING ENGINE  
RELEVANT METRICS

SIMPLE & EFFECTIVE  
PROJECT MANAGEMENT

## REPORTING

INTERACTIVE  
CUSTOMIZABLE GANTT

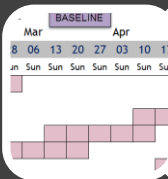
## SMART

ACTIONABLE TRIGGERS  
VISUAL FEEDBACK

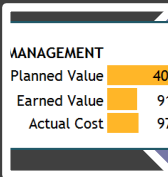
# BENEFITS



SAVE TIME IN SCHEDULING



GET AUTOMATED REPORTING



IMPROVED PROJECT MANAGEMENT



SAVE MONEY VS COSTLY PM SOFTWARE



ALL WITHIN FAMILIAR EXCEL

# FEATURES

- **Plan and Manage**
  - Create baseline plan and lock
  - Track actual progress
  - Compare Plan Vs Baseline & Actual Vs Plan
- **Automatic Scheduling**
  - Automatically creates schedule
  - Schedule updates with actual progress
- **Automated Reporting**
  - Project report with relevant metrics
  - Detailed Task level report
  - Resource Summary Report
  - Customizable Gantt Chart
  - Cost calculation (Earned Value, Planned Value)
  - Burn Down (Hours) Chart
- **Resource Management**
  - Supports flexible resource availability
  - Supports vacation/overtime
  - Calculates Resource Utilization Rates
- **Smart Actionable Triggers**
  - Identify tasks that will not complete
  - Identify tasks that are behind schedule
  - Identify resources underutilized
- **Practical Functionality**
  - Up to 2 Predecessors per task
  - Prioritize tasks
  - Milestones
  - Supports company Holidays
  - Ready to export as PDF

# SCREENSHOTS


# PROJECT REPORT

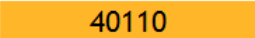


*Relevant metrics about  
Baseline Plan & Current Plan*

|                           | BASELINE PLAN |             | CURRENT PLAN               |  |
|---------------------------|---------------|-------------|----------------------------|--|
| <b>STATUS</b>             | Will Complete |             | Will Complete              |  |
| <b>DATES</b>              |               |             |                            |  |
| Start                     | 15-Feb-2016   | 29-Feb-2016 | Starts Behind Schedule     |  |
| Finish                    | 19-Apr-2016   | 27-Apr-2016 | Finishes Behind Schedule   |  |
| <b>HOURS</b>              |               |             |                            |  |
| Hours Required            | 3964          | 4019        | Increased Hours            |  |
| Hours Scheduled           | 3964          | 4019        |                            |  |
| Hours Not Scheduled       | 0             | 0           |                            |  |
| <b>COST</b>               |               |             |                            |  |
| Resource Cost             | 72620         | 73820       |                            |  |
| Other Cost                |               |             |                            |  |
| Total                     | 72620         | 73820       | Over Baseline Cost         |  |
| <b>TASKS</b>              |               |             |                            |  |
| Number of Tasks           | 150           | 150         |                            |  |
| Tasks that won't complete | 0             | 0           |                            |  |
| <b>RESOURCES</b>          |               |             |                            |  |
| Resource Utilization      | 52%           | 46%         | Decreased Utilization Rate |  |
| Resources Underutilized   | 30            | 30          |                            |  |

# PROJECT REPORT

*Actual Progress at your finger tips*

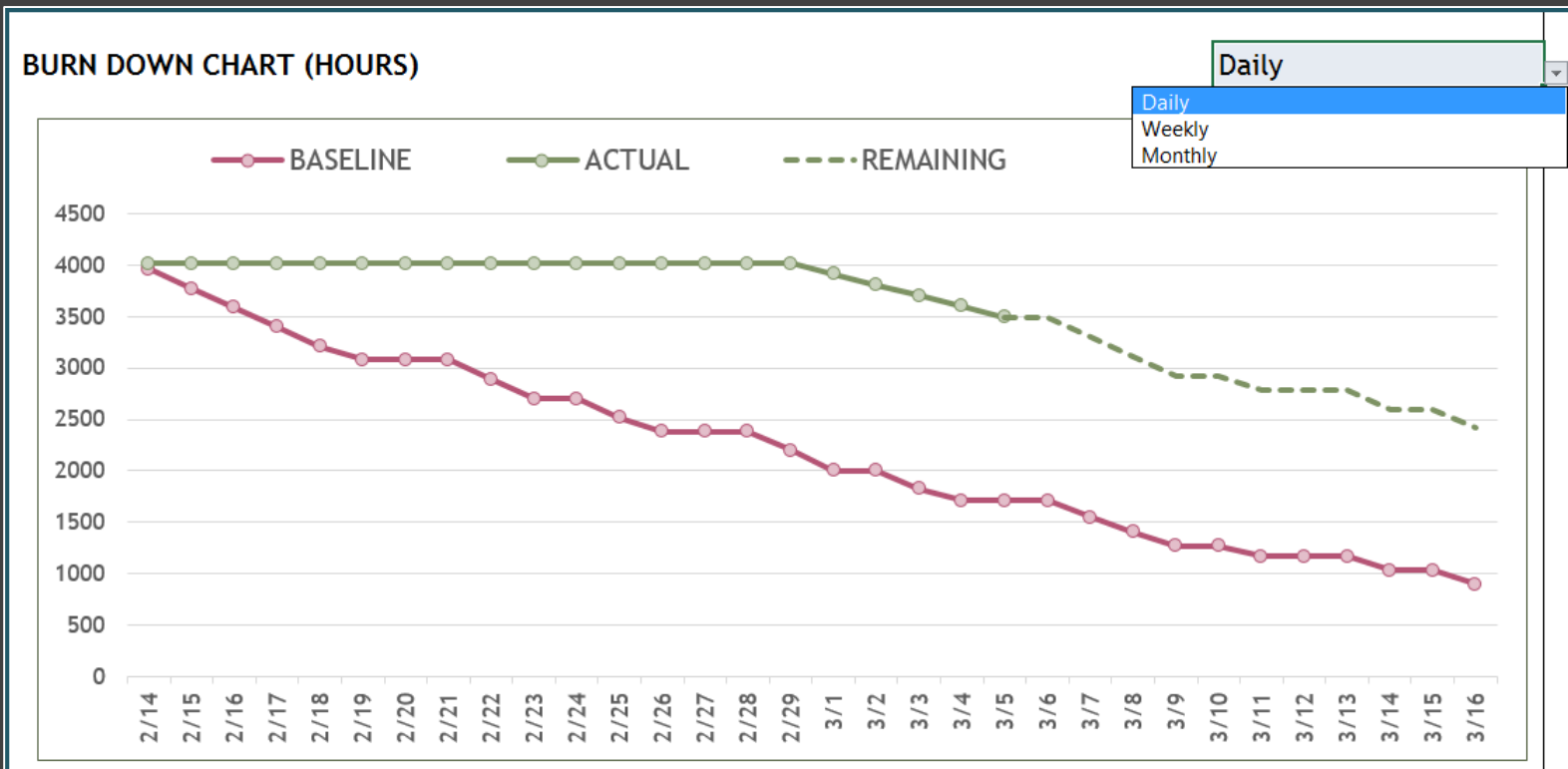
| ACTUAL  |                   |                           |                      |
|---|-------------------|---------------------------|----------------------|
|  |                   |                           |                      |
| <b>COMPLETE</b>   |                   |                           |                      |
| <b>DATES</b>  |                   |                           |                      |
| Start   | 01-Mar-2016 ----- | Finish                    |                      |
| <b>HOURS</b>  |                   | <b>% of CP Complete</b>   |                      |
| Hours Completed   | 522               | 12%                       | As per Baseline 2254 |
| Hours Remaining   | 3852              |                           | Currently 1732       |
|   |                   | Hrs should have completed |                      |
|   |                   | Hrs Behind Baseline       |                      |

| COST MANAGEMENT |   |       |  |
|-----------------|---|-------|--|
| Planned Value   |  | 40110 | Remaining Cost 70585                                   |
| Earned Value    |  | 9100  | Cost Performance Index 0.94 <b>OVER PLANNED COST</b>   |
| Actual Cost     |  | 9715  | Schedule Performance Index 0.23 <b>BEHIND SCHEDULE</b> |



# PROJECT REPORT

*Burn Down Chart – Daily/Weekly/Monthly*  
*31 periods*



# PROJECT REPORT

## *Milestones – Planned and Actual*

### MILESTONES

| TASK    | BASELINE FINISH | CURRENT PLAN FINISH |
|---------|-----------------|---------------------|
| TASK 2  | 05-Apr          | 06-Apr              |
| TASK 6  | 19-Apr          | 21-Apr              |
| TASK 15 | 17-Feb          | 03-Mar              |
| TASK 23 | 16-Feb          | 01-Mar              |
| TASK 35 | 22-Mar          | 04-Apr              |
| TASK 53 | 23-Feb          | 09-Mar              |
| TASK 67 | 16-Mar          | 28-Mar              |
| TASK 83 | 08-Mar          | 23-Mar              |
| TASK 91 | 26-Feb          | 11-Mar              |

### MILESTONES

| TASK    | ACTUAL FINISH | % Complete |
|---------|---------------|------------|
| TASK 2  | 01-Mar        | 100%       |
| TASK 6  | 01-Mar        | 100%       |
| TASK 15 |               | 45%        |
| TASK 23 |               | 11%        |
| TASK 35 |               | 0%         |
| TASK 53 |               | 0%         |
| TASK 67 |               | 0%         |
| TASK 83 |               | 0%         |
| TASK 91 |               | 0%         |

# TASK REPORT

*Baseline Plan & Current Plan Metrics for each task*

## BASELINE PLAN

| BASELINE START | BASELINE FINISH | BASELINE HOURS REQUIRED | BASELINE HOURS NOT SCHEDULED | BASELINE BUDGET COST | BASELINE STATUS             |
|----------------|-----------------|-------------------------|------------------------------|----------------------|-----------------------------|
| 17-Feb-2016    | 22-Feb-2016     | 20                      | 0                            | 500                  | Won't Complete by Pref Date |
| 15-Feb-2016    | 16-Feb-2016     | 9                       | 0                            | 90                   | Will Complete by Pref Date  |
| 11-Mar-2016    |                 | 42                      | 30                           | 240                  | Won't Complete              |
| 07-Mar-2016    |                 | 200                     | 187.5                        | 187.5                | Won't Complete              |
| 23-Feb-2016    | 14-Mar-2016     | 47                      | 0                            | 940                  | Will Complete by Pref Date  |
| 23-Feb-2016    | 26-Feb-2016     | 23                      | 0                            | 230                  | Will Complete by Pref Date  |
| 15-Feb-2016    | 25-Feb-2016     | 39                      | 0                            | 585                  | Will Complete by Pref Date  |
| 15-Feb-2016    | 18-Feb-2016     | 25                      | 0                            | 625                  | Will Complete by Pref Date  |
| 15-Feb-2016    | 15-Feb-2016     | 4                       | 0                            | 40                   | Will Complete by Pref Date  |

*Flags tasks that will not complete*

## CURRENT PLAN

| EARLIEST POSSIBLE START | CURRENT PLAN START | CURRENT PLAN FINISH | CURRENT PLAN HOURS REQUIRED | HOURS NOT SCHEDULED | COST | PLAN STATUS                 | FINISH VARIANCE STATUS |
|-------------------------|--------------------|---------------------|-----------------------------|---------------------|------|-----------------------------|------------------------|
| 08-Mar-2016             | 01-Mar-2016        | 14-Mar-2016         | 30                          | 0                   | 750  | Won't Complete by Pref Date | Behind Schedule        |
| 15-Feb-2016             | 01-Mar-2016        | 07-Mar-2016         | 9                           | 0                   | 110  | Will Complete by Pref Date  | Behind Schedule        |
| 10-Mar-2016             | 01-Mar-2016        |                     | 42                          | 26                  | 320  | Won't Complete              | On Schedule            |
| 05-Mar-2016             | 01-Mar-2016        |                     | 205                         | 157                 | 930  | Won't Complete              | On Schedule            |
| 15-Mar-2016             | 02-Mar-2016        |                     | 47                          | 42                  | 75   | Won't Complete              | Behind Schedule        |
| 15-Mar-2016             | 01-Mar-2016        | 01-Mar-2016         | 23                          | 0                   | 345  | Will Complete by Pref Date  | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        |                     | 39                          | 14                  | 375  | Won't Complete              | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        | 14-Mar-2016         | 25                          | 0                   | 625  | Will Complete by Pref Date  | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        | 07-Mar-2016         | 4                           | 0                   | 40   | Will Complete by Pref Date  | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        | 07-Mar-2016         | 3                           | 0                   | 45   | Will Complete by Pref Date  | Behind Schedule        |
| 08-Mar-2016             | 08-Mar-2016        |                     | 19                          | 3                   | 400  | Won't Complete              | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        |                     | 42                          | 2                   | 800  | Won't Complete              | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        |                     | 33                          | 8                   | 500  | Won't Complete              | Behind Schedule        |
| 15-Feb-2016             | 07-Mar-2016        | 08-Mar-2016         | 10                          | 0                   | 100  | Will Complete by Pref Date  | Behind Schedule        |

*Flags tasks that will finish behind schedule*

# TASK REPORT

*Actual Progress Metrics for each task*

*Flags tasks that are late*

## ACTUAL

| ACTUAL START | ACTUAL FINISH | HOURS COMPLETED | HOURS REMAINING | ACTUAL COST | REMAINING COST | ACTUAL STATUS | % COMPLETE | ACTUAL vs BASELINE VARIANCE STATUS |
|--------------|---------------|-----------------|-----------------|-------------|----------------|---------------|------------|------------------------------------|
| 01-Mar-2016  |               | 13              | 17              | 325         | 425            | In Progress   | 43%        | Late                               |
| 01-Mar-2016  |               | 6               | 3               | 80          | 30             | In Progress   | 67%        | Late                               |
| 01-Mar-2016  |               | 4               | 12              | 80          | 240            | In Progress   | 10%        | Ahead                              |
| 01-Mar-2016  |               | 33              | 15              | 705         | 225            | In Progress   | 16%        | Ahead                              |
| 02-Mar-2016  |               | 5               | 0               | 75          | 0              | In Progress   | 11%        | Late                               |
| 01-Mar-2016  | 01-Mar-2016   | 23              | 0               | 345         | 0              | Complete      | 100%       | On Track                           |
|              |               | 0               | 25              | 0           | 375            | Not Started   | 0%         | Late                               |
|              |               | 0               | 25              | 0           | 625            | Not Started   | 0%         | Late                               |
|              |               | 0               | 4               | 0           | 40             | Not Started   | 0%         | Late                               |
|              |               | 0               | 3               | 0           | 45             | Not Started   | 0%         | Late                               |
|              |               | 0               | 16              | 0           | 400            | Not Started   | 0%         | Late                               |
|              |               | 0               | 40              | 0           | 800            | Not Started   | 0%         | Late                               |

# RESOURCE REPORT

*Resource Metrics with quick highlight of underutilized resources*

| RESOURCE SUMMARY |               | BASELINE PLAN |           |             |      |
|------------------|---------------|---------------|-----------|-------------|------|
| RESOURCE NAME    | COST PER HOUR | HOURS         | HOURS     | UTILIZATION | COST |
|                  |               | AVAILABLE     | SCHEDULED | RATE        |      |
| 1 RES 1          | 10            | 349           | 103       | 30%         | 1030 |
| 2 RES 2          | 15            | 210           | 125       | 60%         | 1875 |
| 3 RES 3          | 25            | 278           | 181       | 65%         | 4525 |
| 4 RES 4          | 20            | 258           | 151       | 59%         | 3020 |
| 5 RES 5          | 20            | 172           | 121       | 70%         | 2420 |
| 6 RES 6          | 10            | 344           | 126       | 37%         | 1260 |
| 7 RES 7          | 15            | 221           | 105       | 48%         | 1575 |
| 8 RES 8          | 25            | 266           | 143       | 54%         | 3575 |
| 9 RES 9          | 10            | 178           | 102       | 57%         | 1020 |
| 10 RES 10        | 15            | 252           | 136       | 54%         | 2040 |

| RESOURCE SUMMARY |               | CURRENT PLAN |           |             |      |
|------------------|---------------|--------------|-----------|-------------|------|
| RESOURCE NAME    | COST PER HOUR | HOURS        | HOURS     | UTILIZATION | COST |
|                  |               | AVAILABLE    | SCHEDULED | RATE        |      |
| 1 RES 1          | 10            | 426          | 104       | 24%         | 1070 |
| 2 RES 2          | 15            | 260          | 131       | 50%         | 1965 |
| 3 RES 3          | 25            | 340          | 207       | 61%         | 5175 |
| 4 RES 4          | 20            | 306          | 192       | 63%         | 3840 |
| 5 RES 5          | 20            | 214          | 116       | 54%         | 2320 |
| 6 RES 6          | 10            | 410          | 103       | 25%         | 1030 |
| 7 RES 7          | 15            | 272          | 105       | 39%         | 1575 |
| 8 RES 8          | 25            | 316          | 143       | 45%         | 3575 |
| 9 RES 9          | 10            | 220          | 97        | 44%         | 970  |
| 10 RES 10        | 15            | 300          | 136       | 45%         | 2040 |

| RESOURCE SUMMARY |               | ACTUAL    |             |      |                 | ENTER UTILIZATION RATE THRESHOLD |
|------------------|---------------|-----------|-------------|------|-----------------|----------------------------------|
| RESOURCE NAME    | COST PER HOUR | HOURS     | UTILIZATION | COST | HOURS REMAINING |                                  |
|                  |               | COMPLETED | RATE        |      |                 |                                  |
| 1 RES 1          | 10            | 7         | 6%          | 100  | 97              | ✗                                |
| 2 RES 2          | 15            | 34        | 52%         | 510  | 97              | ✓                                |
| 3 RES 3          | 25            | 24        | 26%         | 600  | 183             | ✓                                |
| 4 RES 4          | 20            | 25        | 30%         | 500  | 167             | ✓                                |
| 5 RES 5          | 20            | 0         | 0%          | 0    | 116             | ✗                                |
| 6 RES 6          | 10            | 0         | 0%          | 0    | 103             | ✗                                |
| 7 RES 7          | 15            | 0         | 0%          | 0    | 105             | ✗                                |
| 8 RES 8          | 25            | 0         | 0%          | 0    | 143             | ✗                                |
| 9 RES 9          | 10            | 0         | 0%          | 0    | 97              | ✗                                |
| 10 RES 10        | 15            | 0         | 0%          | 0    | 136             | ✗                                |

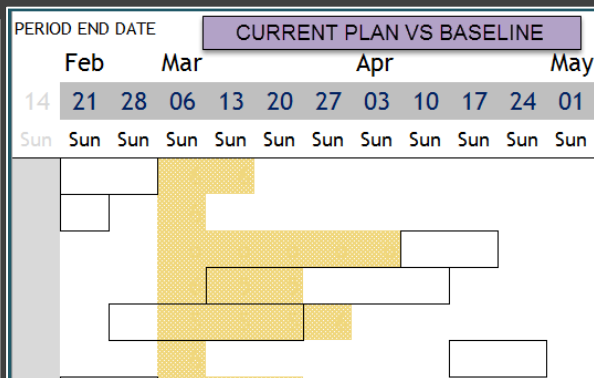
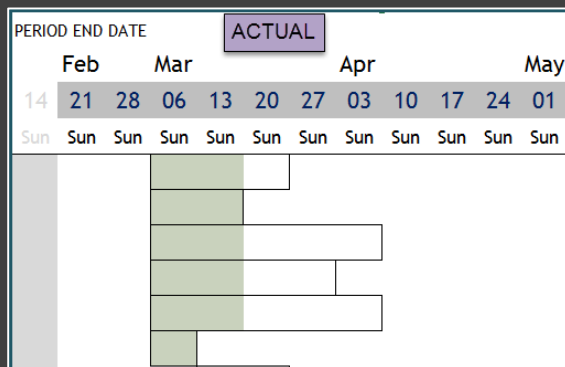
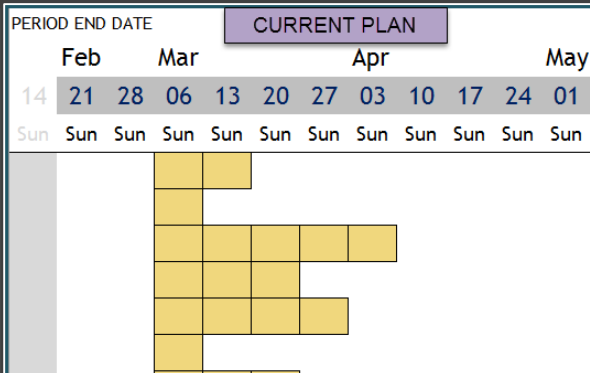
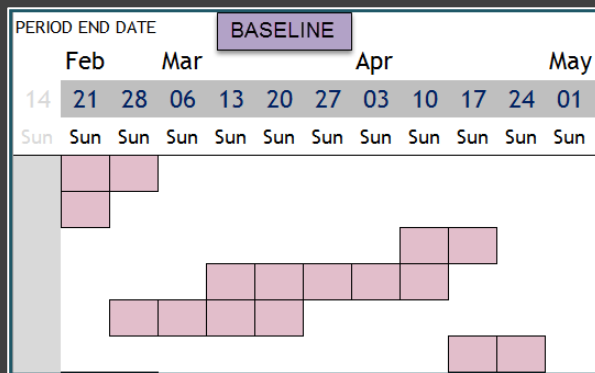
ENTER UTILIZATION RATE THRESHOLD  
**20%**

# GANTT CHART

*Customizable Gantt Chart*

*Daily/Weekly/Monthly, Any Start Date*

*Four Views: Baseline, Current Plan, Actual, Plan vs Baseline*



## GANTT CHART

|          |               |
|----------|---------------|
| PERIOD   | DAILY         |
| VIEW     | BASELINE PLAN |
| FILTER   | ALL TASKS     |
| RESOURCE | RES 1         |
| START DT | 15-Feb        |

*30 tasks at a time,*

*52 periods*

*Filter to one resource*

*or only milestones*

# TASK SCHEDULE

*7 Day schedule at task level*

| TASK ID | TASK NAME | RESOURCE | 08-Mar | 09-Mar | 10-Mar | 11-Mar | 12-Mar | 13-Mar | 14-Mar |
|---------|-----------|----------|--------|--------|--------|--------|--------|--------|--------|
|         |           |          | Tue    | Wed    | Thu    | Fri    | Sat    | Sun    | Mon    |
| 3       | TASK 3    | RES 3    | 0      | 8      | 0      | 0      | 0      | 0      | 8      |
| 1       | TASK 1    | RES 1    | 3      | 0      | 0      | 0      | 0      | 0      | 0      |
| 4       | TASK 4    | RES 4    | 0      | 0      | 0      | 0      | 0      | 0      | 0      |
| 2       | TASK 2    | RES 2    | 5      | 2.5    | 0      | 2.5    | 0      | 0      | 2.5    |
| 5       | TASK 5    | RES 5    | 0      | 0      | 0      | 0      | 0      | 0      | 0      |
| 6       | TASK 6    | RES 6    | 0      | 0      | 0      | 0      | 0      | 0      | 0      |
| 7       | TASK 7    | RES 7    | 5      | 5      | 0      | 5      | 0      | 0      | 5      |
| 8       | TASK 8    | RES 8    | 8      | 8      | 0      | 0      | 0      | 0      | 8      |
| 9       | TASK 9    | RES 9    | 4      | 0      | 0      | 0      | 0      | 0      | 0      |
| 10      | TASK 10   | RES 10   | 3      | 0      | 0      | 0      | 0      | 0      | 0      |
| 11      | TASK 11   | RES 11   | 0      | 4      | 0      | 4      | 0      | 0      | 4      |
| 12      | TASK 12   | RES 12   | 8      | 8      | 0      | 8      | 0      | 0      | 8      |

| LEGEND          |               |
|-----------------|---------------|
| Company Holiday | Unavailable   |
| Weekend         | Underutilized |
|                 | Unutilized    |

## LIMITATIONS

- Maximum 1-year project duration
- 150 Tasks
- 30 Resources
- 1 Project at a time
- Only 1 resource can be assigned to a Task
- Dependent Tasks begin 1 day after predecessor tasks end

## REQUIREMENTS

- Excel for Windows (2010 and above)
- Excel for Mac (2011 and above)



## MORE DETAILS

Product Page

[indzara.com/product/project-manager-excel-template/](http://indzara.com/product/project-manager-excel-template/)

Product Support Page

Site: [indzara.com](http://indzara.com)

Email: [indzara@gmail.com](mailto:indzara@gmail.com)