



Thank You for Your Purchase!

You've just taken a powerful step toward **mastering your project planning and portfolio tracking**. The **Advanced Project Plan & Portfolio Excel Template** is built for serious project managers who want to save time, stay organized, and deliver results with confidence.



Download Link: (<https://template22.com/thank-you-page-mptppm-dashboard/>)



Demo & Tutorial Page(<https://template22.com/demo-of-multiple-projects-tracking-planning-portfolio-management-dashboard-template-in-excel/>)








✉ **Support:** support@template22.com



Website: template22.com

Advanced Project Plan & Portfolio Excel Template

The **Advanced Project Plan & Portfolio Excel Template** is a fully automated, interactive Excel tool that lets you manage:

-  Multiple projects
-  Project tasks and milestones
-  Budgets and actual costs
-  Gantt chart and timelines
-  Risks & issues
-  Resources & teams
-  Dashboards and real-time KPIs

It uses Excel's formulas, conditional formatting, charts, and macros to transform your data into an intelligent project management system — **without needing expensive PM software.**

How It Works







The engine of this template is the “**Data Sheet.**” Every input you add there feeds into:

-  **The Dashboard**
-  **Project Reports**
-  **Calendars & Gantt Charts**
-  **Thermograms & Timelines**
-  **Resource and Budget Summaries**

All you have to do is enter your project information once — the rest updates automatically.

How This Template Helps You

This template can help you:

Feature	Benefit
 Automated Reports	Save 100+ hours with real-time project dashboards.
 Focused Planning	Organize multiple projects under one portfolio.
 Timeline Views	Get clear Gantt and milestone views instantly.
 Budget Control	Track planned vs. actual costs.
 Risk Tracking	Manage risks/issues proactively.
 Team Allocation	Assign tasks, roles, and deadlines.



How to Enter Data in the Data Sheet

Your **Data Sheet** is your master input page.



Follow This Structure:

Column	Description
Type	Choose: Project, Milestone, Task
Task	The title of the item
Assigned To	Person/team responsible
Start Date	Projected starting point
Days	Planned duration
End Date	Auto-calculated
Cost	Estimated cost
% Complete	Fill in for tracking progress
Actual Cost	Track real expenses

⌘ Task Hierarchy:

Projects → Milestones → Tasks

You must enter them in this order for automation to work. For example:

Text.








1. Project Alpha

└─ Milestone: Define Phase

└─ Task: Market Research

Precautions (VERY IMPORTANT)

Before using the template, please read these rules carefully:

1.  **DO NOT DELETE or MOVE any columns** in the Data Sheet.
2.  **DO NOT delete the first 3 header rows** – they’re essential for the template to work.
3.  **ALWAYS begin with a ‘Project’ row**, followed by milestones and tasks.
4.  Use the **provided headers only** unless marking as “Optional.”
5.  The table **must not be moved** from its original position — automation depends on its exact layout.
6.  **Always save a backup** before making large changes.
7.  Avoid unnecessary changes to hidden sheets like Calculations, Settings, or DB Management.

USER MANUAL

Advanced Project Plan & Portfolio Excel Template

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1. 🕒 Introduction

This Excel template is your all-in-one **project planning, tracking, and reporting system**. Built for busy professionals and teams, it turns raw data into **dynamic, automated reports** — including dashboards, Gantt charts, timelines, and cost summaries.

It supports **multiple projects** within a single file, saving you time, reducing manual errors, and enhancing clarity across your workflow.

2. 🏆 Key Features

- 📁 Multi-project management
- 📅 Automated Gantt Chart
- 📊 Dynamic Dashboard
- 💰 Cost planning vs. actual cost tracking
- 🧠 Risk & issue log
- 👤 Task assignment
- 📋 Built-in portfolio reports
- 🗓️ Interactive timeline views
- 📈 Calculation sheets (fully formula-driven)

3. 📁 File Overview – Sheet-by-Sheet

Sheet Name	Purpose
Dashboard	Real-time summary with charts and metrics
Projects	Project-level data view
Milestones	Mid-level stage details
Tasks	Task list
Cost	Budget and cost analytics
Gantt Chart	Visual project timeline
Resource	Who's doing what
Thermogram	Visual completion status
Calendar	Monthly task distribution
Timeline	Combined project timeline
To Do List	Daily task management
Risks & Issues	Risk tracking
Risk Issue Log	Consolidated view
Data Sheet	🔥 Master input sheet
Settings	Optional customizations
Calculations	Hidden logic engine (do not edit)
Reports	Project/portfolio summaries
DB Management	System logic (do not edit)

4. Getting Started

1. **Open the File:** Enable macros if prompted.
2. **Go to Data Sheet.**
3. **Follow the Hierarchy:**
 - Start with Project
 - Add Milestones
 - List Tasks under each milestone
4. **Fill in mandatory fields only** (skip optional columns unless needed).
5. See updates live in:
 - Dashboard
 - Gantt Chart
 - Calendar
 - Budget reports

5. The Data Sheet – Your Core Engine

This is where all your data lives. From here, every chart, report, and dashboard is generated.

Structure:

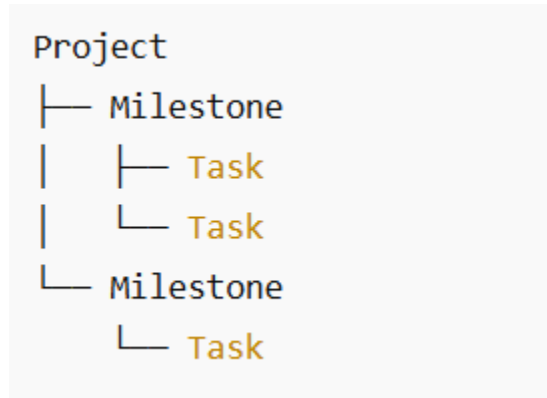
Field	Description
Type	Project, Milestone, or Task
Task	Name of item
Assigned To	Resource or team name
Start Date	When it begins
Days	Duration
Cost	Planned budget
% Complete	Progress (0–100)
Actual Cost	What you've spent
Optional X	Any custom fields
Comments	Notes or remarks

Example Entry:

Type	Task	Assigned To	Start Date	Days	Cost	% Complete
Project	Website Revamp	John	2025-05-01	60	5000	0
Milestone	Design Phase	Sarah	2025-05-01	20	1500	20
Task	Wireframe Mockup	Sarah	2025-05-02	7	400	100

6. ? Task Hierarchy Rules (Important)

You MUST follow this sequence in the Type column:



Project

├─ Milestone

| └─ Task

| └─ Task

└─ Milestone






└─ Task

- A **Project** groups milestones.
- A **Milestone** groups tasks.
- **Tasks** are the lowest actionable level.

Skipping this structure can **break the logic** of the charts.

7. Dashboard Overview

Navigate to the **Dashboard** sheet. Here's what you'll see:

-  % Completion per Project
-  Total Days, Tasks, Delays
-  Budgeted vs. Actual Spend
-  Gantt Summary Snapshot
-  Status Thermogram

💡 *Tip: The dashboard updates automatically. You don't need to refresh manually.*

8. Gantt Chart & Timeline

Located in the **Gantt Chart** sheet:

- Each row is a task
- Colored bars show start and end dates
- % Complete overlays task progress

In the **Timeline** sheet:

- See all projects' key milestones together

These tools are ideal for **executive reviews** or **client updates**.

9. 💰 Budgeting & Cost Tracking

The **Cost** sheet compares:

- Budget vs. Actual
- Planned vs. Real Start/End Dates
- Task-level, milestone-level, and project-level summaries

You can also identify:

- 📈 Budget overruns
- ⌚ Delays
- ✅ Cost savings

10. 🧠 Risk & Issue Management

Use the **Risks & Issues** and **Risk Issue Log** to:

- Log risks and blockers
- Track ownership and status
- Classify risks by severity or impact

👉 *Highly useful for internal audits, retrospectives, and stakeholder updates.*

11. Resource Allocation

In the **Resource** sheet:

- View who is assigned to which task
- Track workload per resource
- Identify overbooked or underutilized team members

Optional: Use “Assigned To” for departments or vendors.

12. Reports & Portfolio Views

The **Reports** sheet gives:

- One-click summaries
- Charts by project, cost, or time
- Print-ready views for leadership

💡 *Pair this with the Calendar sheet to plan your month.*

13. ⚠️ Precautions & Limitations

🔒 DO NOT:

- Delete or rename columns in Data Sheet
- Delete header rows (first 3)
- Move the data table or formatting
- Touch Settings, Calculations, DB Management unless you are an Excel expert

✅ DO:

- Always begin with a backup
- Follow the Type hierarchy: Project > Milestone > Task
- Use only formatted date fields
- Input % Complete only for tasks
- Use Optional columns only if needed

14. 🌟 Tips for Better Use

- 🖨️ Use the “Print Area” setting in Dashboard to export charts
- 🔄 Update % Complete every week for accurate reporting
- 📅 Use Start Date + Days for auto-calculating End Date
- ✅ Avoid blank rows between project entries
- 📝 Use comments for status updates

15. ? FAQs

Q1: Do I need to enable macros?

Yes. Macros allow dashboard refresh and conditional visuals.

Q2: Can I add more columns to the Data Sheet?

Yes, but only after the last Optional column. Do not move existing ones.

Q3: What happens if I enter tasks without a milestone?

They may not show up in dashboard views properly.

Q4: Can I change colors or fonts?

Yes! Feel free to personalize the design elements.

Q5: Is this template mobile-friendly?

It's best used on desktop for full functionality.

16. ? Support

For help, reach out to our support team:

 **Email:** support@template22.com

 **Website:** www.template22.com

 **More Templates:** [Explore Products](#)

Want custom automation? Contact us at support@template22.com for premium Excel consulting.