

Simple Scheduling

Mike Sawyer, STC Summit 2015

mike@sawyerhome.net • bit.ly/simpleschedule



Spreadsheet project schedules

<ul style="list-style-type: none">• Ubiquitous tool (and many options for software).• Formalizes schedule & plan.• Tracks progress, keeps history, packages ref info.• Transitory—not for long-completed projects.	<ul style="list-style-type: none">• Ideally collaborative.• Start with prototype, modify as you go.• Contents vary depending on your particular needs.• Examples and more at bit.ly/simpleschedule.
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Layout & printing

<p>Design however you want! Here's what I've used:</p> <ul style="list-style-type: none">• Keep sheet narrow enough for single-screen/single-page viewing.• Projects in column on left, data field titles along top in a non-scrolling region.• Small & narrow fonts keep info compact.	<ul style="list-style-type: none">• Define a header for printing that includes filename, page #, date & time. Page Layout ribbon > Page Setup > Custom Header.• Print landscape with narrow margins, shrink to fit to paper width. Print > Fit All Columns on One Page.
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Formatting (direct & conditional)

<ul style="list-style-type: none">• Use Home ribbon to format text like MS Word.• Vertical align to "top" or "center."• Wrap text. Home ribbon > Wrap Text.• Short date/currency formats (Excel remembers exact amount even when displaying rounded). Right-click cell > Format Cells...	<ul style="list-style-type: none">• Borders & shading emphasize. Color shading if you can color print, otherwise pattern.• Conditional formatting applies special formats/symbols that depend on a cell's value. Home ribbon > Conditional Formatting > New Rule...
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Field ideas

<p><i>Descriptive:</i></p> <ul style="list-style-type: none">• Doc part#/Revision• Product (or project)• Deliverable (UG, QSG, help, etc.)• Format of output• Priority• Audience• Product part#/ model• Writer & designer• PoCs/Reviewers• Budget planned• Notes	<p><i>Goals & gates:</i></p> <ul style="list-style-type: none">• Deadline• Edit due• Draft due• Final due <p><i>Historical:</i></p> <ul style="list-style-type: none">• Date added• % done• Approved• Web posted• Delivered• Archived	<p><i>Measurement:</i></p> <ul style="list-style-type: none">• Elapsed time since start (work days vs. true days)• Time left before due• Hours (for billing)• Budgeted hours remaining <p><i>Cost:</i></p> <ul style="list-style-type: none">• Budget planned• Budget used• Budget remaining
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Tables, sorting, and filtering, data validation

<ul style="list-style-type: none">• Tables allow sorting/filtering. Select range, then Insert ribbon > Table, or Home ribbon > Format as Table.• Sorting/filtering: Click column's drop-down menu, select sort option or filter criteria.	<ul style="list-style-type: none">• Data validation allows only certain types of data or number/date ranges. Data ribbon > Data Validation.
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Formulas & functions

<ul style="list-style-type: none">• A formula is just an equation you type in a cell, starting with “=”.• Displays the value of the formula.• Can use cell references, numbers, and functions.• Functions are like mini-programs within a formula.• For row numbers that won't sort along with projects: Add one narrow column at far left containing formula “Row()”. <p><i>Cell references:</i></p> <ul style="list-style-type: none">• Column letter first, then row # (“A1”). To make cell reference absolute, insert “\$” before the part to keep absolute. (ex: “\$A\$1”) <p><i>Math:</i></p> <ul style="list-style-type: none">• Addition/Subtraction (A1+B2), (A1-B2)• Multiplication (A1*B2) or (A1)(B2)• Division (A1/B2)• Exponents (A1^2)• Nested operations (A1*3)+(5*B2) <p><i>How:</i></p> <ul style="list-style-type: none">• Help with functions: Home ribbon > Σ (sum) button > More Functions...• Paste a formula's value elsewhere: Copy, right-click destination cell, click 123 (Values) button.	<p><i>Popular functions:</i></p> <ul style="list-style-type: none">• AVERAGE Computes the mean value of a range of cells.• CELL Can show the sheet's filename. Useful for headers/footers.• CONCATENATE Joins several text strings into one text string.• COUNT Counts the number of cells within a range that contain numbers.• COUNTBLANK Counts the number of empty cells within a range of cells.• COUNTIF Computes the number of cells within the defined range that meet the criteria you specify.• DAYS360 Returns the number of days between two dates. Useful for counting days remaining before deadline.• MAX Returns the largest value in a set of values.• MEDIAN Returns the median value in a set of values.• MIN Returns the smallest value in a set of values.• NETWORKDAYS Returns the number of “business days” (M-F) between two dates.• NOW Returns the current date and time, down to the second.• ROUND Rounds a cell's fractional value to a specified number of digits.• SUM Adds all numbers in a range of cells.
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Best practices

<ul style="list-style-type: none">• Back up regularly (at least weekly).• Keep worksheets in workbook for at least a quarter.• Name worksheets by date.• Collaborate—other writers, artists, project managers, etc. can view and make changes, as needed.	<ul style="list-style-type: none">• Create and maintain a master project record as a permanent record. Update when a project is started and finished. Info could include project name, part number, assigned writer/artist, date of completion, who provided signoff and when, etc.
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More examples, starter spreadsheets, handouts, and more at:

bit.ly/simpleschedule

