How to Build a Project Dashboard in Excel



Build a dashboard that supports a decision

Start with the project question before choosing charts.

Choose the view

This tutorial builds a task-level dashboard showing item completion, overdue open work and budget versus actual spend. It uses a small reproducible data set.

Sample limits

Task counts are unweighted counts, and unspent budget is not a forecast or earned-value cost variance. Use each measure for the question it answers.

What you will build

An input table, a calculation area and a compact dashboard with four metrics and a status chart. Formulas use English Excel function names and comma separators.

TAKE IT TO YOUR PROJECT

Write the decisions your dashboard should support.

Separate input, calculations and display

A simple workbook structure makes the data easier to maintain and check.

Create three sheets

Use Data for source records, Summary for grouped calculations and Dashboard for the view. Keep one current source rather than copying totals between separate versions.

Sample setup

The Data table will be named Tasks. Dashboard cell B2 holds the sample reporting date and is named ReportDate. Summary holds counts and owner totals.

Keep the basis visible

Show the status date, data owner and meaning of the measures. Menu labels and formula separators can differ by Excel version and locale.

TAKE IT TO YOUR PROJECT

Create the three sheets and identify who owns the input.

Use one row per task

A consistent table gives formulas a reliable structure.

Create the headers

In Data, use ID, Task, Owner, Due, Status, Budget and Actual, in columns A through G. Use a unique required ID for each task.

Define the types

Due must be a real Excel date; Budget and Actual numeric amounts on the same cost basis. Status uses a controlled set: Done, In Progress and Not Started.

Avoid mixed records

Do not place subtotals, explanatory notes or merged cells inside the task rows. Keep source records separate from the presentation.

TAKE IT TO YOUR PROJECT

Check one row for a unique ID, real date and valid status.

Enter the sample task states

Use the same data to check your results later.

The eight IDs

T01 Discover, T02 Design, T03 Build A, T04 Build B, T05 Test A, T06 Test B, T07 Train and T08 Handover.

Status and due dates

The table gives the sample status and due date for each ID. Enter dates as actual date values, using an unambiguous display such as 20-Oct-2026.

The reporting context

The worked snapshot is 31-Oct-2026. Four tasks are Done, three In Progress and one Not Started. These are illustrative project records.

ID	Status	Due / 2026
T01	Done	20-Oct
T02	Done	22-Oct
T03	Done	25-Oct
T04	In Progress	28-Oct
T05	In Progress	30-Oct
T06	Not Started	02-Nov
T07	Done	29-Oct
T08	In Progress	05-Nov

TAKE IT TO YOUR PROJECT

Enter the eight rows and compare the states with the sample.

Enter the sample cost data

Keep task budgets and actual costs on a consistent basis.

Budget amounts

For T01 through T08 respectively, enter $500, $800, $1,500, $1,400, $700, $600, $400 and $300.

Actual amounts

For the same IDs, enter $450, $820, $1,550, $900, $300, $0, $390 and $40. The sample assumes these are reconciled incurred costs at the reporting date.

Owner example

Use appropriate role owners, such as Analyst, Designer, Dev, Tester, Trainer and Ops. Assign both build tasks to Dev and both test tasks to Tester for grouped totals.

TAKE IT TO YOUR PROJECT

Reconcile budgets to $6,200 and actual costs to $4,450.

The All-in-One PM Templates Bundle

940+ Premium Templates • One Payment • Lifetime Access

$49

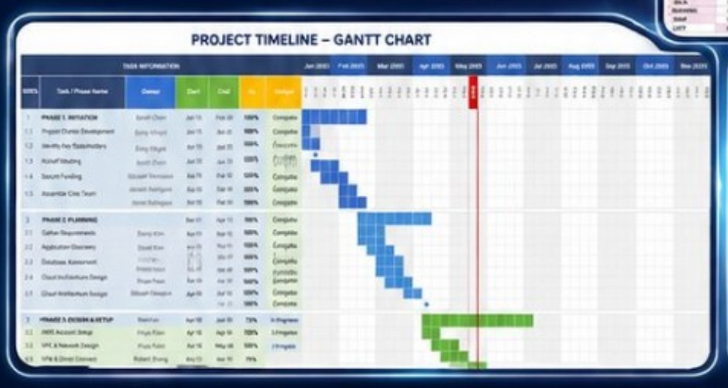
SAVE 94%

Worth $3,300+











EXCEL & GOOGLE SHEETS | PROFESSIONAL & RELIABLE | AUTOMATED DASHBOARDS | SAVE TIME & STAY ON TRACK | INSTANT ACCESS DOWNLOAD

GET LIFETIME ACCESS

Create an Excel Table

Structured references make the formulas easier to extend and read.

Convert the range

Select the complete headers and task rows, choose Insert then Table, and confirm that the range has headers. Name the table Tasks through the table-design controls.

Use the reference

Tasks[Status] refers to the Status column. Tasks[Budget] refers to the Budget column. The fully qualified names are useful in calculations outside the table.

Test expansion

Add a temporary valid row and confirm the table expands, then remove it. Avoid placing unrelated content where the table needs to grow.

TAKE IT TO YOUR PROJECT

Confirm the table name and all seven header spellings.

Validate the input

A correct formula can still give a misleading result from inconsistent data.

Use controlled values

Apply suitable validation for statuses and required fields. Check duplicate IDs, blank states, invalid dates and numeric amounts stored as text.

Sample check

"In Progress" with an extra trailing space can appear as a separate label in summaries. Fix source consistency instead of manually adjusting the displayed count.

Keep the process simple

Decide who updates records and how missing facts are flagged. Do not turn an unknown cost into zero merely to remove an error.

TAKE IT TO YOUR PROJECT

Check the eight rows before building calculations.

Set a reproducible reporting date

Use one explicit date so every overdue calculation uses the same cutoff.

Name the cell

Enter 31-Oct-2026 in Dashboard B2, ensure it is a date value and use Excel's name controls to name that cell ReportDate.

Why the cutoff matters

A task due on the reporting date is not overdue under this tutorial's rule. Open work due before the date is overdue; Done items are excluded.

Choose the update rule

You can use a changing current date where appropriate, but an explicit status date helps reproduce a particular report. Keep the displayed date aligned with the data cutoff.

TAKE IT TO YOUR PROJECT

Confirm ReportDate refers to the intended date cell.

Count the task population

Every percentage needs a defined denominator.

Use the formula

=COUNTA(Tasks[ID]) counts the populated ID cells in this sample. IDs must be required, unique and consistently maintained; the sample contains 8.

Check the population

Avoid hidden subtotal rows or formula-generated empty IDs that could make the count unsuitable. Validate the source and choose a counting rule matching actual records.

Use the result

This is a count of task records. It is not a measure of effort, earned value or equal business contribution.

TAKE IT TO YOUR PROJECT

Verify that adding and removing a valid task changes the count correctly.

Calculate Done and completion rate

Keep the count and the percentage definition visible.

Count completed items

=COUNTIF(Tasks[Status], "Done") gives 4 for the sample. The status should mean the agreed completion evidence exists.

Calculate the rate

=IFERROR(COUNTIF(Tasks[Status], "Done") / COUNTA(Tasks[ID]), 0) gives 0.50. Format as 50%. This example displays 0 for an empty population, so also show the record count.

Interpret honestly

The result is an unweighted item-completion rate. A large unfinished task can matter more than several small completed ones.

TAKE IT TO YOUR PROJECT

Confirm 4 Done items divided by 8 records produces 50%.

Count overdue open work

Use a rule that excludes missing dates and completed tasks.

Use the formula

=COUNTIFS(Tasks[Due], ">0", Tasks[Due], "<"&ReportDate, Tasks[Status], "<>Done", Tasks[ID], "<>")

Check the sample

T04 is open and due 28-Oct; T05 is open and due 30-Oct. At 31-Oct, the result is 2. T06 and T08 are due later, while past-due Done items are excluded.

Check edge cases

A blank date is unknown rather than automatically overdue. Missing or invalid status still needs data-quality attention before the dashboard can be trusted.

TAKE IT TO YOUR PROJECT

Verify the result against the two actual sample rows.

Calculate budget and actual totals

Show clear cost labels rather than implying a forecast from spending alone.

Use the totals

=SUM(Tasks[Budget]) gives $6,200. =SUM(Tasks[Actual]) gives $4,450 for the sample. Format consistently as currency.

Calculate the difference

=SUM(Tasks[Budget]) - SUM(Tasks[Actual]) gives $1,750. Label it Budget less actual, or another accurate label under your reporting convention.

Explain the limit

The difference does not account for all remaining work or open commitments unless those are separately modelled. It is not proof the project will finish under budget.

TAKE IT TO YOUR PROJECT

Reconcile the two totals to the source and identify the missing forecast information.

Summarise cost by owner

Grouped totals help the reader see where the recorded cost sits.

Prepare the summary

List role owners in Summary column D, with an Actual total header in E. If D2 contains Dev, use =SUMIFS(Tasks[Actual], Tasks[Owner], D2) in E2.

Check the sample

The two build-task actuals are $1,550 and $900, so Dev totals $2,450. Apply the same formula to other listed owners.

Check completeness

The grouped totals should reconcile to the full actual total when the list covers every valid owner once. Blank or inconsistent owners need correction.

TAKE IT TO YOUR PROJECT

Confirm the Dev subtotal and the complete owner reconciliation.

Create a status summary

Charts work best from a small, checkable summary.

Set the range

In Summary A1:B4 use headers Status and Count. Put Done, In Progress and Not Started in A2:A4.

Use the formula

In B2 enter =COUNTIF(Tasks[Status], A2) and copy through B4. The sample returns 4, 3 and 1.

Reconcile the categories

The counts sum to 8. If they do not match the task population, inspect missing, misspelled or additional status labels.

TAKE IT TO YOUR PROJECT

Compare the summary total with the ID count.

Add a simple chart

Choose a visual that makes the comparison easy to read.

Build the chart

Select the status summary and insert a suitable bar or column chart. Give it an accurate title and readable category labels. Avoid decorative effects that obscure the values.

Sample view

The bars show Done 4, In Progress 3 and Not Started 1. The source below remains available so a reader can check the count.

Use consistent meaning

Use colours and labels that support understanding. A status distribution shows work states, not the project's overall health by itself.

TAKE IT TO YOUR PROJECT

Ask a reader to identify the largest state without explanation.



Learn from 350+ top universities and companies

ILLINOIS

Duke UNIVERSITY

Google

UNIVERSITY OF MICHIGAN

IBM

VANDERBILT UNIVERSITY

JOHNS HOPKINS UNIVERSITY

Invest in your career

Explore new skills

Access 10,000+ courses in AI, business, technology, and more.

Use a PivotTable where helpful

A PivotTable can summarise the same source for additional views.

Create the view

Select the Tasks table and use Insert then PivotTable, choosing an appropriate location. Place Status in Rows and ID in Values, set to Count where required.

Check the result

The sample should again show 4, 3 and 1. An owner-cost view can use Owner in Rows and Actual in Values as a Sum.

Refresh deliberately

PivotTables may need refresh when source data changes. Check the source, refresh process and result rather than assuming every displayed view updated automatically.

TAKE IT TO YOUR PROJECT

Compare a PivotTable total with the formula summary.

Highlight overdue rows

A visual rule should implement the same logic as the metric.

Use the sample columns

For Data rows with ID in A, Due in D and Status in E, a formula-based conditional-format rule can use =AND($D2>0, $D2<ReportDate, $E2<>"Done", $A2<>"").

Apply carefully

Apply the rule to the intended data rows, with row-relative references starting at the first selected row. Confirm how it behaves when the Table expands.

Test the evidence

Only T04 and T05 should meet the sample overdue condition. A formatted row should agree with the count, not create a second conflicting rule.

TAKE IT TO YOUR PROJECT

Check one Done row, one overdue row and one future-due row.

Arrange a readable dashboard

A compact view should show the status date and the decisions it supports.

Use a clear hierarchy

Place the title and reporting date first, then the main counts and cost totals, then the status chart and a short exception or action note.

Sample layout

Show Tasks 8, Done 4, Completion 50% and Overdue open 2. Display budget $6,200 and actual $4,450 with an accurately labelled difference.

Keep the detail accessible

Link readers to source rows and assumptions. Avoid packing every available chart into the page if it weakens the main message.

TAKE IT TO YOUR PROJECT

Choose the few measures the reader actually needs.

Test before sharing

Check both arithmetic and behaviour when the data changes.

Use controlled cases

Temporarily change an open task to Done, alter a due date, add a valid row and test a missing value. Restore the sample afterwards.

Expected behaviour

Done count and completion rate should change together; overdue should follow the agreed date and status rule. Table-based formulas should include a new valid row.

Reconcile all views

Formula totals, chart summaries, PivotTables and conditional formatting should agree after the relevant recalculation and refresh steps.

TAKE IT TO YOUR PROJECT

Record the expected result of one test before performing it.

Define the update routine

A dashboard needs a repeatable source and review process.

Assign ownership

Agree who updates tasks, verifies costs, confirms completion, sets the status date and reviews exceptions. Keep source definitions consistent over time.

Sample routine

Update the input, validate records, set ReportDate, recalculate as required, refresh summaries and inspect the exception list before distribution.

Preserve snapshots

If historical comparisons matter, retain an appropriate dated snapshot or history. Replacing yesterday's numbers alone cannot establish a trend.

TAKE IT TO YOUR PROJECT

Write a five-step update checklist with named role owners.

The worked dashboard result

Use this page to reconcile the finished view with the tutorial data.

Headline metrics

The sample has 8 tasks, 4 Done, 50% unweighted completion and 2 overdue open items at 31-Oct-2026.

Money view

Budget totals $6,200 and actual cost $4,450. The $1,750 difference is unspent against task budgets, not a final-cost forecast.

Status distribution

The chart is calculated from the same source categories: 4 Done, 3 In Progress and 1 Not Started. Inspect the open rows before deciding the next action.

Task status / item count



TAKE IT TO YOUR PROJECT

Compare every displayed result with its source formula.

Your Excel-dashboard desk check

A useful dashboard combines reliable input, correct calculation and clear meaning.

Check the model

One row per valid task, consistent headers, real dates and numeric costs, an explicit reporting cutoff and definitions for each metric.

Check the views

Do formula totals, grouped summaries, PivotTables, charts and formatting reconcile? Are refresh and data-quality responsibilities clear?

Check the decision

Can the reader identify the relevant exception and next action without mistaking item counts for value or unspent budget for a forecast?

TAKE IT TO YOUR PROJECT

Rebuild the sample, explain every metric and adapt the structure to your own project.