

"EVMtool_intl" Instruction Manual

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1. Introduction

"EVMtool_intl" (hereinafter referred to as "this system") is a tool designed to assist project managers (PMs) with schedule management, primarily for system development projects. By enabling operations within Excel, this system facilitates the easy generation of visual outputs—such as Gantt charts, progress lines, and EVM (Earned Value Management) graphs—thereby powerfully supporting the schedule management processes carried out by PMs.

(1) Key Features

- Automatic creation of WBS numbers
By configuring the WBS hierarchy, WBS numbers are automatically generated.
- Holiday Settings
Weekends (including national holidays in the Japanese locale) are automatically set as holidays. It is also possible to configure project-specific working days and holidays.
- Add/Modify/Delete Tasks
Tasks can be added, modified, or deleted while the project is in progress.
- Creating a Gantt chart
A Gantt chart can be created simply by entering the start and end dates of tasks.
- Display Progress lines
Entering the actual progress rate displays the "Progress lines" and the number of days ahead of or behind schedule, enabling a visual check of the progress status.
- EVM Graph Creation
Entering actual effort displays an EVM graph, enabling a visual check of tracking the progression of planned versus actual values.
Note that the units for EVM values and costs used in this system represent effort, not monetary amounts.
- Analysis of cost and schedule status
It becomes possible to obtain analysis results regarding the cost and schedule status for each task.
- Creating a Workload Breakdown by Assignee
Assigning a person to a task generates a breakdown of workload by assignee.
- Project duration limits
This depends on Excel's maximum number of columns. Since Excel 2007 and later versions support up to 16,384 columns—allowing for a maximum timeframe of approximately 44 years—we do not anticipate any issues preventing the creation of Gantt charts in typical scenarios.
- Internationalization Support
This system operates even if the PC's language environment is set to something other than Japanese. In the current version, the interface is displayed entirely in English when used in a non-Japanese locale.

(2) Operating environment

Operation has been verified on Excel 2013 running on Windows 10 and Windows 11, including the 64-bit version.

Versions of Excel prior to 2013 are not supported. While it is likely to function with Microsoft Office versions 2013 and later, note that we cannot guarantee operation as these configurations have not been verified.

(3) Installation/Uninstallation

➤ Installation

Extract "EVMtool_intl.zip" to an appropriate location.

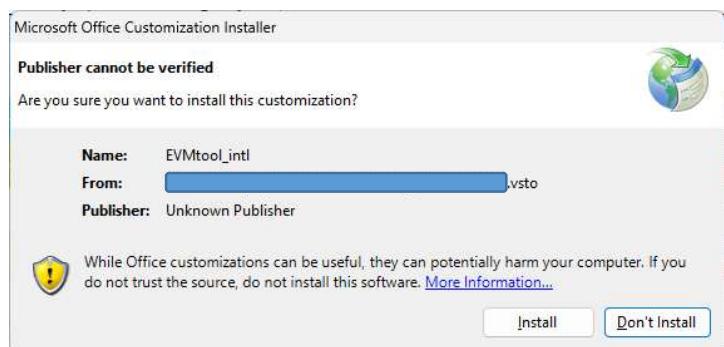
The "EVMtool_intl.xlsx" file located within the extracted "EVMtool_intl" folder is the main Excel workbook for this system.

If the screen shown on the right appears when launching "EVMtool_intl.xlsx" for the first time, click **Install**.

This feature appears to allow for the safe addition and configuration of a program known as VSTO (Visual Studio

Tools for Office)—developed using Visual Studio—on the user's computer.

Note that while "EVMtool_intl.xlsx" may be renamed when copied or saved, it must be saved within the "EVMtool_intl" folder.



➤ Uninstallation

Delete the "EVM_tool_intl.zip" file and the "EVMtool_intl" folder entirely.

(4) License

This system is shareware registered with Vector (<https://www.vector.co.jp/>).

A screen for entering a license key will appear upon the first launch; if you have purchased a license, please enter your key.

If you have not purchased a license, all features are available for 30 days following the initial launch as a trial version. You may also install the software on additional computers; please use the same license key for these installations. There is no need to purchase a separate license.

(5) Where to purchase a license

For information regarding the purchase of this system—including pricing—please refer to the Vector download page; specifically, consult the section titled "Remitting Payment for Shareware" and complete the payment process via the "Share-it" (Share-Regi) service.

2. Definitions of Terms

(1) Task

While various terms—such as "task," "work package," and "activity"—are used to refer to the units of work that make up a project, this system refers to all of them simply as "tasks."

(2) Child Task

This refers to a task that does not have any subordinate tasks; hereafter, it is referred to as a "Child Task".

Set the planned values (start date, end date, estimated effort, etc.) and actual values (start date, end date, actual effort and progress rate) for this task.

(3) Parent Task

This refers to a task that has subordinate tasks; it is hereafter referred to as a "Parent Task". The planned and actual values for this task are automatically set within the system based on data from the subordinate tasks.

(4) Hierarchy Levels

The first (top-level) task—representing the project name—is designated as Level 0, while all subsequent tasks are positioned as Child Tasks of the first, placing them at Level 1 or higher.

The method for setting hierarchy levels is described later (see 4. (4) Procedure for Creating Task Planning Data), but the Excel indentation function is used via button operations. Consequently, the hierarchy is limited to a maximum of 15 levels.

(5) WBS Number

This refers to the automatically generated WBS number, which is set in the "WBS No." field. The formatting rules use integers for levels 0 and 1, while levels 2 and 3 use periods (e.g., l.m for level 2 and l.m.n for level 3).

(6) Confirmed Date

The "Confirmed Date" refers to the date on which actual data is confirmed; it is set by double-clicking the "Conf. Date" field (cell F3) on the 'WBS&Gantt' sheet.

3. 'Basic Setting' sheet

This is the sheet for setting up the project's basic information.

A	B	C	D	E	F	G
1	• Project Data Initialization Settings					
2	Create New Project (Initialization)		(Note) Existing data on all sheets will be reset.			
3						
4	• Effort Related Unit Settings			• Color Settings		
5	Start day of the week in the calendar dialog	Sun		Level 0 task		
6	Day of the week to start effort aggregation	Mon	(*1)	Level 1 task		
7	Effort Related Unit Settings	Person-month	(*2)	Parent tasks at level 2 or lower		
8	(*1) Previous day is used as the weekly aggregation.			Holidays		
9	(*1).(*2) Change is not allowed after clicking the			Planning bar		
10	"Confirm Actual Effort" button on the 'WBS&Gantt' sheet.			Progress bar		
11						
12	• Member Settings			(Note) Maximum number of members: 1,000		
13	No.	Name	ID	Mail address	Phone no.	Remarks
14	1	A B				
15	2	C D				
16	3	E F				
17	4	G H				
18	5	I J				
19	6	K L				
20	7	M N				
21	8	Group(3)				
22						

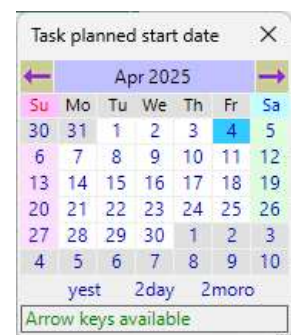
(1) Project Data Initialization Settings

Clicking the "**Create New Project (Initialize)**" button will initialize the project data.

Note that any existing data on the 'WBS & Gantt' sheet will be completely reset.

(2) Effort Related Unit Settings

- "Start day of the week in the calendar dialog" selection field
Set the starting day of the week (Sunday or Monday) in the calendar dialog shown in the figure on the right, which is used in the 'WBS&Gantt' sheet.



- "Day of the week to start effort aggregation " Selection field
This system aggregates effort on a weekly basis.
Select the starting day of the week for effort aggregation based on the PM's management policy. Consequently, the weekly aggregation date will be the day immediately preceding the selected day.

(Note) This setting cannot be changed if the "**Confirm Actual Effort**" button has already been clicked on the "WBS & Gantt" sheet and actual data has been generated.

- "Unit of effort" Selection Field
Select whether to use "person-days" or "person-months" as the unit for managing project effort.

(Note) Changes cannot be made if the "**Confirm Actual Effort**" button has already been clicked on the 'WBS&Gantt' sheet and actual data has been generated.

(3) Color Settings

Set the cell colors in the 'WBS&Gantt' sheet.

➤ "Level 0 Task"

This is the color of the first (topmost) task (= project name).

➤ "Level 1 Task "

This is the color for Level 1 tasks (the hierarchy level directly under the project).

➤ "Parent Tasks at level 2 or lower"

This is the color for tasks that are below Level 1 and have subtasks.

(Note) Child Tasks are not colored.

➤ "Holidays"

This is the color used to indicate holidays in the Gantt chart section.

➤ "Planning bar"

This is the color used for the planned duration in the Gantt chart. Parent Tasks are displayed with a hatched pattern.

➤ "Progress bar"

This is the color used for the actual duration in the Gantt chart. Parent Tasks are displayed with a hatched pattern.

(4) Member Settings

Configure the project members. This is primarily used when assigning individuals to tasks on the 'WBS & Gantt' sheet; however, it is also acceptable to assign members other than the person responsible for the task.

Enter the member names one by one in the "Name" field. A number will appear in the "No." field once an entry is made. It can be configured for up to 1,000 individuals. If necessary, fill in the ID, Mail address, Phone no., and Remarks in their respective fields.

Note that the "Name" field cannot be left blank or set to the same name as an existing member. Additionally, if an assignee has already been assigned on the 'WBS&Gantt' sheet, the corresponding name in the "Name" field on the 'Basic Setting' sheet cannot be changed, in order to ensure consistency.

Exercise great care when handling the configured data, as it may contain personal information.

4. 'WBS&Gantt' sheet

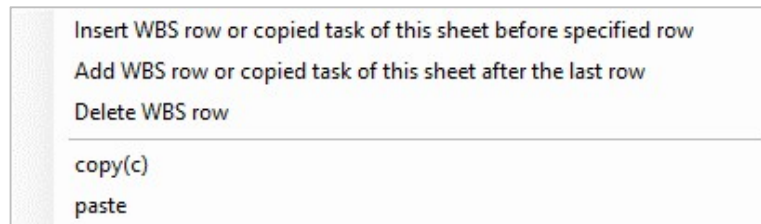
This is the main sheet of this system.

Entering project planning and actual data generates outputs such as Gantt charts, progress lines, and EVM graphs.

(1) How to add, insert, or delete task rows

In this sheet, two rows in Excel are grouped together to form the data area for a single task, enclosed by borders. Therefore, the range extending down to the row displaying the bottom border constitutes the area where task data can currently be entered and serves as the target for the following operations.

Right-clicking the "Task" column (Column G) displays the menu shown in the figure on the right.



Use the functions in the menu to add or delete rows for task data.

Operation methods for various scenarios are described below.

(Note) Perform all the following click operations in the "Task" column (Column G).

- When inserting a blank line before the "specified line"
 - ✓ Left-click the specified row, or drag across multiple rows using the left mouse button.
 - ✓ Right-click, then left-click "Insert this sheet's WBS row or copied task before the specified row" in the menu.
- When copying the "Task Name" of a task row with data already set and inserting it before the "specified row"
 - ✓ Left-click the line to copy, or drag across multiple lines using the left mouse button.
 - ✓ Copy using the "Copy" option in the right-click menu or a keyboard shortcut (such as Ctrl + C).
 - ✓ Left-click to select the specified row.
 - ✓ Right-click, then left-click "Insert this sheet's WBS row or copied task before the specified row" in the menu.
- When adding a blank line after the last line

This is the feature most frequently used during the initial stages of data creation.

 - ✓ Left-click on any row, or drag the left mouse button across multiple rows.
 - ✓ Right-click, then left-click "Add this sheet's WBS row or copied task after the last row" in the menu.

- When copying the "Task Name" of a task row with data already set and adding it after the last row:
 - ✓ Left-click the line to copy, or drag across multiple lines using the left mouse button.
 - ✓ Copy using the "Copy" option in the right-click menu or a keyboard shortcut (such as Ctrl + C).
 - ✓ Right-click, then left-click "Add this sheet's WBS row or copied task after the last row" in the menu.
- To delete a task row
 - ✓ Left-click the row to delete, or drag across multiple rows using the left mouse button.
 - ✓ Right-click, then left-click "Delete WBS Row" in the menu.

(2) Date Input Method

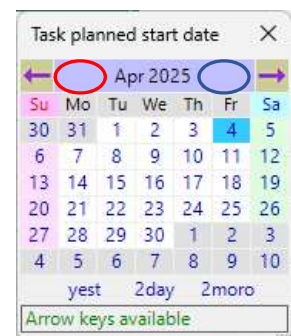
The following is the function for setting the date from the screen.

- * This feature uses the "calendar processing program created by Mr. Osamu Inoue," as described in "7. Conditions of Use."

Double-clicking the start date or end date cell displays the screen on the right. (In a Japanese locale, national holidays are displayed in red.)

On this screen, after setting the year and month, clicking the number representing the day sets that date in the cell that previously double-clicked.

On this screen, set the year and month, then click the number representing the day; that date will be set in the cell that previously double-clicked.



- The "Year" and "Month" displayed on the screen can be changed using the following operations.
 - ✓ "Year": Click the area outlined in blue in the figure on the right to select the year.
 - ✓ "Month": Click the area outlined in red in the figure on the left to select a month.
 - Click ◀ or ▶ to switch to the previous or next month.
- To avoid changing the date in the cell or to cancel the date entry screen, click the "X" button.

(3) How to set the person in charge

Use this function to assign task owners during the planning phase.

Assignments can only be made to Child Tasks that do not have sub-tasks. An example is shown below.

➤ Add Assignee

- ✓ Double-clicking the cell in the "Number of Assignees" field for the target task (task

No.	WBS No.	Task (task level can be set by clicking arrows)	No. of Assignees
1	0	aaa	Max.20
2	1	a	
3	1.1	a1	
4	1.2	a2	
5	1.2.1	a2-1	3
6	1.2.2	a2-2	
7	1.2.3	a2-3	3
8	1.2.4	a2-4	1
9	1.2.5	a2-5	3
10	1.3	a3	3
11	1.4	a4	2
12	2	b	
13	2.1	b1	5

Task Assignee Settings

Task Information

WBS No. 1.1

Task a1

Start date 4/2/2025 End date 4/3/2025 Total Cost 6.0

Member assignment plan

Name	Start Date	End Date	Effort

Add Remove Modify

OK Cancel

"a1," No. 3 in the figure below) opens the "Task Assignee Settings" screen.

- ✓ Clicking the **"Add"** button on the "Task Assignee Settings" screen displays the "Add Assignees" screen (shown in the bottom-left figure) over the "Task Assignee Settings" screen.
- ✓ Select the person(s) to assign to the relevant task here, and click **OK**.
- ✓ The selection results are reflected in the "Task Assignee Settings" screen (shown in the figure at the bottom right).

Task Assignee Settings

Task Information

WBS No. 1.1

Task a1

Start date 4/2/2025 End date 4/3/2025 Total Cost 6.0

Member assignment plan

Name	Start Date	End Date	Effort
A B	4/2/2025	4/3/2025	0.0
C D	4/2/2025	4/3/2025	0.0
E F	4/2/2025	4/3/2025	0.0

Add Remove Modify

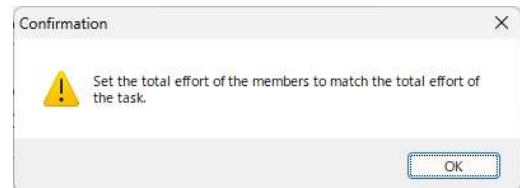
OK Cancel

- ✓ Enter the scheduled start date, scheduled end date, and effort for each person in charge.

- ✓ If the total effort for all assigned personnel match the value in the "Total Effort" field of the plan, clicking **OK** will reflect the data (within the red frame in the figure below) on the sheet.

1	WBS setting, calculation and analysis															
2	Update WBS			Confirm Actual Effort			Reset Previous Actuals									
3	Conf. Date		2025/4/22													
4	No.	WBS No.	Task (task level can be set by clicking arrows)	No. of Assignees Max.20	Assignee1				Assignee2				Assignee3			
5			← All levels →		Name	Start Date	End Date	Effort	Name	Start Date	End Date	Effort	Name	Start Date	End Date	Effort
7	1	0	aaa													
8																
9	2	1	a													
10																
11	3	1.1	a1	3	A B	4/2	4/3	2.0	C D	4/2	4/3	2.0	E F	4/2	4/3	2.0
12																

- ✓ The message on the right appears when the total effort for all assigned personnel do not match the value in the "Total Effort" field of the plan.



After clicking **OK**, return to the "Task Assignee Settings" screen. Then, adjust the effort by modifying the assignee data as described below.

➤ Updating Representative Data

- ✓ On the "Task Assignee Settings" screen, select the assignee and click the **"Modify"** button.

The screen shown on the right appears. Click the items to be modified (scheduled start date, scheduled end date, and effort) and make the necessary changes.

Changing the person in charge is also available.

- ✓ Clicking **OK** reflects the results on the "Task Assignee Settings" screen.

Check the data and click **OK** or **Cancel**.

Clicking **OK** applies the data to the sheet.

Clicking **Cancel** cancels all operations and reverts to the original state.

Name	Start Date	End Date	Effort
A B	4/2/2025	4/3/2025	2.0
C D	4/2/2025	4/3/2025	2.0
E F	4/2/2025	4/3/2025	3.0

➤ Deleting Representative Data

- ✓ On the "Task Assignee Settings" screen, select the assignee and click the **"Remove"** button. The result will be reflected on the "Task Assignee Settings" screen.

- ✓ If all assigned personnel are removed, or if the total effort for all assigned personnel match the value in the <Total Effort> field of the plan, clicking **OK** will reflect the data in the sheet.

(4) Procedure for Creating Task Planning Data

Configure items such as "Task Name", "Deliverable/Guide", "Progress/Comments", "Assigned Person", "Scheduled Start Date", "Scheduled End Date" and "Workload".

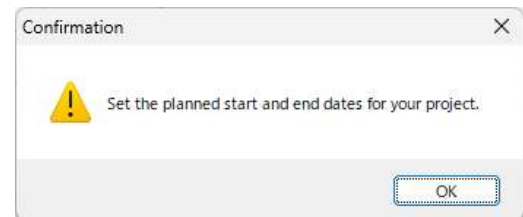
- Settings after initialization
- Clicking the **"Create New Project (Initialize)"** button on the 'Basic Setting' sheet changes the 'WBS&Gantt' sheet to the state shown in the figure below. Perform the following operations.

WBS setting, calculation and analysis										Milestone ->
Update WBS		Confirm Actual Effort		Reset Previous Actuals		Comment, etc. ->				
Conf. Date	Set holiday (1 : Holiday, space : work day) ->									
No.	WBS No.	Task (task level can be set by clicking arrows)	No. of Assignees Max.20	Plan Result	Start Date	End Date	Total Effort (Person-month)	Progress Rate	Plan Result	
		(Enter project name here)		Plan						
				Result						
				Plan						
				Result						

- ✓ Setting the name of the first (leading) task (= project name)
Enter the project name in the first "Task" field.
- ✓ Setting the "Start Date" and "End Date" for the "Plan" across the entire project
To configure the setting, use either key input or the "Date Input" function.
- ✓ Creating a project calendar

Click the **"Update WBS"** button.

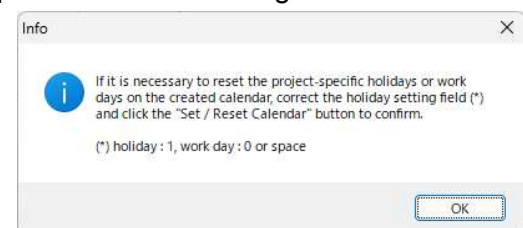
If the start and end dates for the plan have not been set, the message shown in the figure at the top right will appear.



Set the start and end dates, then click the **"Update WBS"** button again.

The figure at the bottom right will then appear. After checking the message, click **OK**.

As a result, a calendar like the one shown below is created in the Gantt chart display area.



	E	F	G	J	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
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If there are project-specific holidays or required working days, enter a half-width "1" for the former and leave the cell blank (or enter "0") for the latter at the corresponding date position in the third row. Then, click the "Update WBS" button again to complete the project calendar configuration.

➤ Task planning data entry

✓ Securing a task row

Use the method described in [\(1\) How to add, insert, or delete task rows](#) above to secure the necessary task rows.

✓ Input item

The table below indicates whether input is required for the task data (✓ : Required, △ : Optional, X: Not required).

Note that while the task name is a required field, leaving it blank means the row will not be evaluated as WBS data and will instead be treated as a comment line.

Input Item	Parent Tasks	Child Tasks
Task name	✓	✓
Product / Guide (Plan/Result)	△	△
Progress, Comment, etc.	△	△
Planned start date and end date	X ¹	△ ²
Planned total effort	X	△ ²
Planned assignee data (name, start date, end date, effort)	X	△ ³

X¹ : Only the first (top-level) task (= project name) requires manual input. For all other Parent Tasks, the start and end dates are automatically set based on the earliest start date and latest end date among their Child Tasks.

△² : No error will occur if the data is not set; however, since the item will be excluded from progress and EVM calculations, enter the data whenever possible.

△³ : This data field applies only to Child Tasks. While it is not a mandatory field, configuring it allows for the generation of effort data broken down by assignee.

When elaborating on a WBS, a task that was initially a Child Task may become a Parent Task. Note that in this case, the assignee data for the task that becomes the Parent Task will be deleted and will not be carried over to the Child Tasks. If necessary, re-configure the data for the Child Tasks.

✓ Setting the Task Level (Hierarchy)

Left-click a single task, or drag the mouse's left button across multiple tasks at the same hierarchical level, then click ← or → above the "Task" column (Column G) to promote or demote their hierarchy level.

✓ Verifying the WBS structure using the "Update WBS" button

After configuring the tasks, clicking the "Update WBS" button at the top of the sheet generates and displays the following data.

- The number in the "No." field
- The WBS number in the "WBS No." field

- Coloring of Parent Tasks
 - Gantt chart for task planning with dates set
- Checking plan data
- The system validates the configuration data after the task planning data is entered and the **"Update WBS"** button is clicked, or during subsequent data entry.
- If any issues are found, a message indicating the problem will be displayed to prompt a review, such as re-examining the data. The main items checked are listed below.
- ✓ Hierarchical level

An error occurs if the hierarchical level of a task is set to a level two or more steps below that of the immediately preceding task.
 - ✓ Planned start date for tasks from No. 2 onwards
 - Setting a date prior to the project start date results in an error.
 - If the earliest start date for all tasks is on or after the project start date, the system will issue a confirmation rather than an error. This approach is taken because there is a possibility that tasks intended to start on the project start date have not yet been created.
 - ✓ Planned completion date for tasks from No. 2 onwards
 - Setting a date after the project end date results in an error.
 - If the latest finish date for all tasks is on or before the project end date, this is treated as a confirmation rather than an error. The reason it is not classified as an error is that there may be tasks yet to be created whose finish date would coincide with the project end date.
 - ✓ Operating day

It results in an error if there are no actual working days (only holidays) between the plan's start and end dates.
 - ✓ Planned effort and total effort for assigned personnel

An error occurs if the total effort for all assigned personnel do not match the value in the plan's "Total Effort" field.

(5) Procedure for configuring task actuals data

The configuration of actual performance data and how to utilize it are explained below.

➤ Inputting task performance data

Configure the following settings for the subtasks.

✓ Actual start date, actual end date

Set the actual start date when work on a task begins, and the actual end date when it is completed.

✓ Actual effort

For tasks that have been started or completed, enter the effort required up to the specified date shown below into the "Total Effort" field.

✓ Progress rate

If a task has not yet been completed, leave the completion date blank and enter the progress rate as a percentage value (do not include the "%" symbol).

However, if a completion date is set, the system automatically treats the progress as 100%, so entering a progress rate is not required.

➤ Checking actual performance data

After entering task actuals data and clicking the "**Update WBS**" button, the system checks the validity of the actuals data, just as it does for the planning data.

If any issues are found, a message indicating the problem will be displayed to prompt a review, such as re-examining the data. The main items checked are listed below.

✓ Actual start date for tasks from No. 2 onwards

Setting a date prior to the project start date results in an error.

✓ Actual completion date for tasks from No. 2 onwards

Setting a date after the project end date results in an error.

✓ Total actual effort

An error occurs if the actual completion date is set to the confirmed date (or earlier) but the value in the "Total Effort" field for the actuals is zero.

✓ Actual progress rate

It is an error to enter an actual progress rate while the value in the "Total Effort" field for actuals remains zero.

➤ Setting the confirmed date

Double-click the "Conf. Date" field (cell F3) to set the confirmed date.

While it is possible to set a past date to run a simulation for a specific point in time, refer to "Utilizing Actual Data" for details on that process.

Since this system stores actual data on a weekly basis—starting from the "Week Start Day" specified in the 'Basic Setting' sheet—it is best to set the date to the last day of the week.

However, it is also permissible to set a date for a different day of the week and enter

actual effort data for that day.

(Note) In any case, ensure the data entered represents actual values up to 23:59 on the specified confirmed date.

➤ Confirmation of actual results

After completing Task planning data entry and Setting the confirmed date on the previous page, click the "**Confirm Actual Effort**" button.

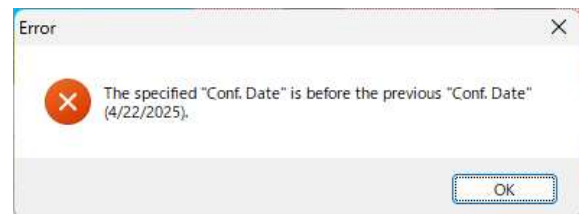
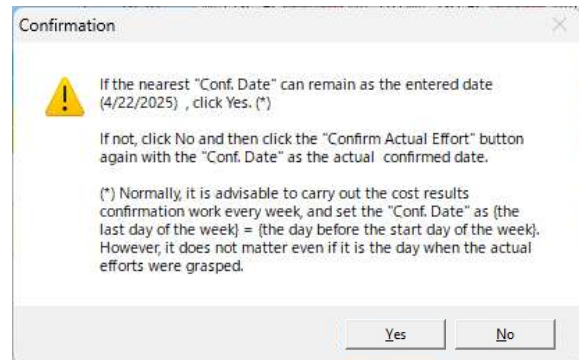
The message shown in the figure on the right will appear.

Clicking **Yes** will generate the following data.

- Gantt chart section (figure below)
- 'EVM Graph' sheet

Normally, perform the above procedure every week.

If the confirmed date is set to a date prior to the previous confirmed date, the message on the right will appear. Click **OK**, reset the confirmed date, and click the "**Confirm Actual Effort**" button again.

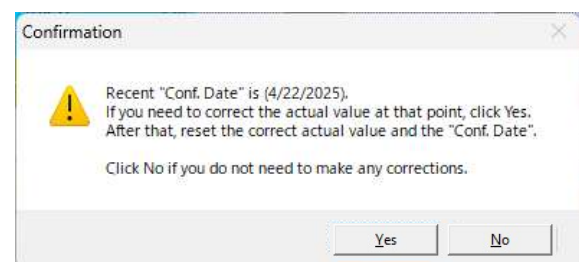


No.	WBS No.	Task (task level can be set by clicking arrows)	No. of Assignees	Plan Result	Start Date	End Date	Total Effort (Person-month)	Progress Rate	Apr 2025													
									Plan	Result	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
1	0	aaa	Max.20	Plan	2025/4/2	2025/7/31	781.0	6%			2	3	4	5	6	7	8	9	10	11	12	13
2	1	a		Plan	2025/4/2	2025/5/2	64.0	70%														
3	1.1	a1	3	Plan	2025/4/2	2025/4/3	6.0	100%														
4	1.2	a2		Plan	2025/4/2	2025/4/3	6.0	100%														
5	1.2.1	a2-1	3	Plan	2025/4/4	2025/4/10	15.0	100%														
6	1.2.2	a2-2		Plan	2025/4/11	2025/4/13	9.0	100%														
7	1.2.3	a2-3	3	Plan	2025/4/16	2025/4/23	14.0	86%														
8	1.2.4	a2-4	1	Plan	2025/4/18	2025/4/23	4.0	75%														
9	1.2.5	a2-5	3	Plan	2025/4/24	2025/4/25	6.0	0%														

➤ Correction of actual data

If errors are found in past performance data or the dates on which past performance was confirmed, correct them using the method below.

- ✓ Click the "**Reset Previous Actuals**" button. A message (shown in the figure on the right) will appear; click **Yes**.
- ✓ After that, correct the actual data and confirmed date, then click the "**Confirm Actual Effort**" button again to confirm the actuals.



(6) Utilization of actual performance data

As one application of historical data, we explain below the simulation of conditions prior to confirmed date.

- Simulation based on data prior to the latest confirmed date.

Double-click the "Conf. Date" field (cell F3), set a past date, and then click the **"Update WBS"** button.

The data listed below will be generated based on that date.

- Gantt chart section
- 'EVM Graph' sheet

Note that data as of the latest confirmed date is retained unless cleared using the **"Reset Previous Actuals"** button.

- Task display by hierarchy level specification

Selecting an item from the list in the combo box below the "Task" section title allows the following to be displayed.

(Note) Graphical elements, such as progress lines, will not be displayed correctly.

- ✓ "Show All Levels"

Displays all tasks.

- ✓ "Planned Date/Effort Not Set"

Displays tasks for which any of the "Start Date", "End Date", or "Total Effort" fields are not set.

- ✓ "Show Rigs Only"

Displays only tasks that are in progress (incomplete or not yet started) as of the operation date.

- ✓ "Within level n"

Displays tasks from Level 0 to Level n.

5. Other sheets

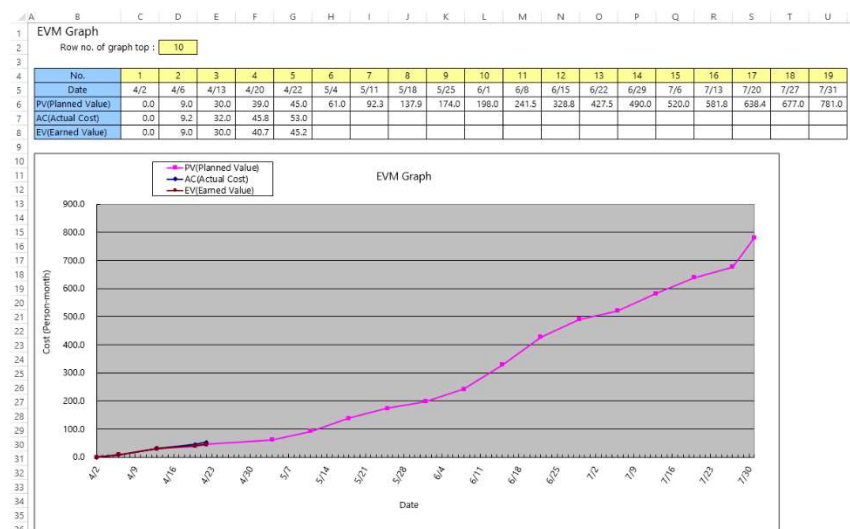
An overview of the sheets other than 'Basic Setting' and 'WBS & Gantt' is provided below.

✧ 'Holiday Setting' sheet

This sheet is displayed only in the Japanese locale and contains holiday setting data for the "Calendar Input Form" found on the website (<https://www.asahi-net.or.jp/~ef2o-inue/top01.html>) by Mr. Osamu Inoue—a resource utilized by this system for date input. It is based on holiday laws effective through 2026; it is an excellent tool that ensures national holidays are correctly reflected simply by updating this sheet should the laws change in the future. Refer to this sheet and Mr. Inoue's website when making any modifications.

✧ 'EVM Graph' sheet

This sheet displays line graphs for PV (Planned Value), AC (Actual Cost), and EV (Earned Value). The starting row for the graph display can be set using the value in the "Graph Start Row" cell (cell D2). The left edge of the graph is fixed to the left edge of column B.



✧ EV Analysis-Related Sheets

The following three sheets contain the parameters, history, and descriptions related to EV analysis.

➤ 'EV Analysis' sheet

This sheet complies with the PMBOK and displays current analysis values and future projections based on the obtained PV, AC, and EV data.

➤ 'EV History' sheet

This sheet stores the data history as of the date the "**Confirm Actual Effort**" button was clicked on the "WBS & Gantt" sheet.

It is possible to track how the analyzed and predicted values have changed over time.

➤ 'EVM Commentary' sheet

Here are the explanations for the parameters listed on the two sheets mentioned above.

✧ 'WL Analysis' sheet

This sheet displays the planned workload on a weekly basis for each person in charge. Use it to assess workloads and for similar purposes.

6. Others

✧ Deleting and Renaming Sheets

Deleting sheets or changing sheet names is prohibited; doing so will cause the system to malfunction.

✧ Sheet Protection

All sheets in this system, other than the 'Holiday Setting' sheet, are password-protected. Note that this password will not be disclosed.

✧ Deleting, modifying, or inserting rows or columns within each sheet

Operations other than the functions provided by this system are prohibited.

✧ Adjustments to the display position of command buttons, etc.

When the maximize button of the Excel window is clicked or the sheet's zoom level is changed, the display position or size of the command button is not correctly reflected. To fix this, simply double-click any cell other than the command button.

✧ Data Recovery

Data modified by the system's internal processes—such as after clicking a button—cannot be reverted to its original state. We recommend taking measures such as saving users work at appropriate intervals or saving it under a different name.

7. Conditions of Use

This system may be used only if the following conditions are agreed to.

✧ Copyright

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Furthermore, use of this system shall be deemed as agreement to the terms set forth herein.

8. Contact address

Send an email to the address below if you have any comments, questions, bug reports, requests for improvements, or general feedback regarding this system.

Email address: <evmtool@gmail.com>