Advanced Project Planner

Setup & Quick-Start Guide | by EdgeVelocity

Welcome, and thank you for your purchase! This planner is a complete, professional project-management workspace in Google Sheets — projects, tasks, budgets, a RAID risk log, a live dashboard with charts, a full-year Gantt calendar, a Kanban board, and optional email automation. This guide gets you up and running in about 5 minutes. No spreadsheet or coding skills needed.

What you need

A free Google account. The planner runs in Google Sheets (in any web browser, and the Google Sheets mobile app). It is not designed for Microsoft Excel.

Step 1 · Make your own copy (2 minutes)

1. Open the template link included with your purchase (in your Etsy download / order confirmation).
2. Make sure you are signed in to your Google account (top-right of the screen).
3. Click **File** → **Make a copy**. Give it a name (e.g. "My Project Planner") and click **Make a copy**.

You now have your own private, fully-editable copy in your Google Drive — with every formula, dropdown, the dashboard, the charts, and the built-in automation already inside it. The original template is never changed.

Step 2 · One-time setup (about 2 clicks)

1. In your copy, find the **Project Planner** menu at the very top, to the right of "Help". (If it isn't there yet, refresh the browser tab and wait a few seconds.)
2. Click **Project Planner** → **Finish Setup (One-Time)**. The first time, Google will ask you to authorize (see the note below). This turns on the check-boxes, protects the auto-calculated cells, flags duplicate IDs, applies your color theme, and finishes the look.
3. Optional but recommended: click **Project Planner** → **Set Up Automation** to switch on daily reminder emails, the weekly digest, and automatic recurring tasks.

> **About the "Google hasn't verified this app" screen — this is normal.** The first time you authorize, Google shows a caution screen because this is a private template (it hasn't gone through Google's public app review, which it doesn't need). It is safe. Click **Advanced** → **Go to Advanced Project Planner** → **Allow**. Nothing leaves your account — the script only ever runs inside your own copy.

Step 3 · Make it yours

- Open the **Setup** tab. Enter your business name and tagline, and pick a color theme from the dropdown — it instantly recolors the header bands on every tab (Dashboard, Gantt, Kanban, and more) to match. No hex codes to remember.
- Add your team (Name + Email) in the roster. These emails are used for the optional reminders/digest — see "Who gets emailed?" in the FAQ to change this later.

Step 4 · Start planning

- **Projects** tab — add your first project. Give it a unique ID (e.g. P001, P002…).
- **Tasks** tab — add tasks under that project. Give each a unique ID (e.g. T001), pick the owner, status, dates, and % complete.
- Everything else — Budget rollups, % complete, project health, the Dashboard, Kanban, Priority Matrix, Client View, and Gantt — updates automatically. You never edit those directly.

What each tab does

Tab	What it does
Setup	Your brand, color theme, and team roster.
Projects	Master project list. Budget, % complete, and health calculate automatically.
Tasks	Every task across every project — the tab you'll use most.
Budget	Line-item planned vs. actual spend per project.
RAID Log	Track Risks, Assumptions, Issues & Dependencies, with scoring.
Dashboard	Live overview: KPIs, workload, overdue work, budget, health, and 5 charts.
Gantt Chart	A full January–December calendar of every task, colored by status, with an adjustable View Year.
Kanban Board	Every task auto-sorted into Not Started / In Progress / Delayed / Completed.
Priority Matrix	Your open tasks in a Do-First / Schedule / Delegate / Don't-Do grid.
Client View	A safe tab to share with clients — only items you mark client-visible.
White-Label Guide	For agencies: how to rebrand a copy per client in minutes.

Good to know

- Light-blue cells are yours to edit. Gray cells calculate automatically — if you try to type in one you'll get a gentle warning (you can still override it if you mean to).
- IDs must be unique. If you re-use a Project, Task, or RAID ID, that cell turns orange as a warning — just change it.
- Project % Complete is the average of that project's task progress, so partial work shows.
- Tidy the Dashboard anytime with **Project Planner** → **Compact Dashboard Rows** — it closes empty space and keeps the charts aligned.
- The maroon AI Digest box gives a quick "top priorities" summary — click **Project Planner** → **Generate AI Digest** (works free, no API key).

- On a phone, use the Google Sheets app; wide tabs and charts scroll sideways.
- Health-check anytime with **Project Planner** → **Check Template Health**.

Quick FAQ

The Project Planner menu isn't showing.

Refresh the browser tab and wait a few seconds — the menu loads a moment after the sheet opens. Make sure you opened your copy (File → Make a copy), not just the preview.

Can I use this in Microsoft Excel?

No — it uses Google Sheets features (like live FILTER views) that Excel doesn't support. It works in Google Sheets on any browser, and the Google Sheets mobile app.

Will reminder emails cost anything?

No. They use your own Google account. Free Google accounts can send up to 100 emails/day (Workspace accounts, 1,500/day) — far more than a normal team needs.

Who gets emailed, and how do I change it?

Reminder emails go to whoever owns the overdue task; the weekly digest goes to everyone listed. Both use the Name + Email roster on the **Setup** tab. To change who is notified, just edit the Email column next to a name — the next send uses whatever is there, no menu action needed. To stop all automated emails, click **Project Planner** → **Turn Off Automation (Remove Triggers)**; click **Set Up Automation** again any time to resume.

Thank you for choosing the Advanced Project Planner by EdgeVelocity. Questions? Reach out through your Etsy messages and we'll be glad to help.