Multi-site rollout tracker

Working guide

Use the workbook to keep one current record for each location, preserve every visit attempt and assign unresolved work. The blank workbook is for your project. A separate 50-site workbook demonstrates the same fields with fictional data.

Sheet	What belongs here
Summary	Counts of unique sites, active-scope progress, visit attempts and open actions.
Instructions	Project ID, version, preparer, review date and wave labels. Definitions and capacity limits.
Sites	One Site ID per location, current scope and readiness, four independent completion states, evidence and verified update.
Visits	One Visit ID per attempt, including no-access, cancellation and a return visit.
Actions	One Action ID per unresolved item, with owner, due time, status and resolution reference.

Start with the location record

1. Set the project. Enter the project ID, preparer, review date and wave labels in Instructions. Yellow cells take inputs. Gray cells contain formulas.

2. Add stable Site IDs. Enter each location once in Sites. Use Active, Deferred or Removed to describe scope. Keep removed locations and the approval reference instead of deleting their history.

3. Separate the outcomes. Update physical work, evidence, technical validation and acceptance independently. A completed visit or closed ticket does not establish acceptance.

4. Preserve attempts and follow-up. Add a new Visit ID when a technician returns. Create or update an Action ID for anything unresolved. Record the responsible person and due time.

Dates, evidence and N/A

Enter local Excel dates and times with their IANA time zone, such as America/Chicago. The workbook does not convert time zones. Use an approved evidence reference instead of copying passwords, access tokens, door codes or unnecessary personal data.

Use Not applicable only when the assignment excludes that requirement. Record its reason or approval. Physical work must be Complete for the combined completion measure; approved N/A is allowed for evidence, validation or acceptance.

Read the counts correctly

Active scope is the progress denominator. Deferred and Removed sites remain visible in separate counts. Visits count attempts; sites count locations. The workbook takes the first occurrence of each ID for totals and flags duplicates. Resolve key conflicts before relying on the summary.

Fictional 50-site example

Measure	Count	Meaning
Site records	50	One location per Site ID across two waves.
Active / deferred / removed	45 / 3 / 2	Only 45 active sites form the progress denominator.
Physical / evidence complete	35 / 30	Five physically completed sites still lack complete evidence.
Validation passed / accepted	28 / 25	Acceptance remains separate from test results.
Visit records / extra visits	48 / 2	Repeat attempts do not create extra locations.
Open / blocked actions	20 / 5	One open action lacks an owner and one lacks a due time.

Three examples to follow

Site 001: the first attempt had no access. A later visit completed the work. Both visits remain; the site counts once. The rebooking action is closed with its resolution reference.

Site 031: installation is physically complete, evidence is partial and validation and acceptance remain pending. A follow-up visit and an open action remain visible.

Site 050: scope was removed and the planned visit was cancelled. The site remains in the removed count. The cancelled visit does not imply installation.

Save and share

The supplied workbook covers 500 sites, 1,000 visits and 1,000 actions. Beyond those rows, extend the tables, formulas, validation and summary ranges together. Print Summary or selected columns from filtered records; do not shrink a wide table onto one small page.

CSV templates carry inputs only. They lose formulas, drop-downs, formatting and multiple sheets. Use ISO local date/time text (YYYY-MM-DD HH:MM) and retain a separate time-zone column. The workbook is the working version.

Resource and context

allitsupported.com/multi-site-rollout-location-tracker/

All example locations, names, dates, references and outcomes are fictional. This guide is a planning resource; project-specific scope and acceptance requirements belong in the agreed assignment.