

Job Shop Work Order Tracker

How-to guide: what the workbook does, how to use it and what every number means.

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Job Shop Work Order Tracker

Track every work order from release to shipment and see on-time delivery, open work by stage, and estimated versus actual hours, cost and margin.

For: Job shop owners, production managers and planners, estimators and the people who run the open-order meeting.

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Quick start

1. On Setup, type your shop name, currency, estimating and costing rates, targets and status date, then replace the example customers and stages.
2. On Work Orders, add one row per job at release: customer, part, quantity, due date, order value and the estimated hours and material.
3. As the job runs, keep its stage and actual hours current; when it ships, type the ship date and the actual material.
4. Read the Check column: anything other than OK names the problem in words.
5. Before the open-order meeting, set the status date on Setup and open the Dashboard; filter by customer or ship dates as needed.

What is in the workbook

Start Here	Read this first: what the workbook does and how to use it.
Setup	Rates, targets, status date and the lists that feed the dropdowns.
Work Orders	One row per work order from release to shipment. Cost, variance, margin, days late and status are calculated.
Dashboard	On-time delivery and open work by stage, then estimate versus actual hours, cost and margin of shipped jobs.
Method	How every number is calculated, with assumptions, limits and sources.
Verify	Self-check: the workbook's formulas recomputed on fixed inputs against an independent reference.

What each number means

Quantity	How it is calculated	Units
Estimated cost	Est hours x estimating rate + est material. Excel: =[@[Est hours]]*EstRate+[@[Est material]]	currency
Actual cost	Actual hours x costing rate + actual material.	currency

Quantity	How it is calculated	Units
Cost variance	Actual cost - estimated cost, for shipped jobs. Positive means the job cost more than estimated.	currency
Hours, rate and material variance	(Actual - est hours) x estimating rate; (costing - estimating rate) x actual hours; actual - est material. They add up to the cost variance.	currency
Margin	(Order value - actual cost) / order value, for shipped jobs; over several jobs, from the sums.	%
Hours used	Actual hours / estimated hours; on the Dashboard, actual / estimated hours of shipped jobs - 1.	%
Days late	Ship date (status date while open) - due date, if positive.	days
Lead time	Ship date - release date, in calendar days.	days
Status	Complete when shipped; Overdue when open past its due date; Due soon when due within the window on Setup; otherwise In progress.	-
On-time delivery	Shipped jobs with ship date on or before the due date / shipped jobs, inside the Dashboard filters.	%
Open order value	Order value of jobs not yet shipped, inside the customer filter.	currency
Weekly, by stage and by customer	The same sums by ship week (Monday start), by the stage of open jobs, and by customer.	-

Assumptions, limitations, sources and the self-check (the Verify sheet, which recomputes the workbook's formulas on fixed test inputs) are in the workbook. The last page shows the Dashboard with the example data for Brennan Precision, a fictional business.

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Engineering estimates for planning and improvement work. Verify the results against your own process, data and standards before you rely on them.

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Customer

Shipped from

Shipped to

Showing 55 shipped and 17 open work orders; status as of 9 Oct 2026. The ship-date filter applies to shipped jobs; the customer filter to both.

ON-TIME DELIVERY	OPEN WORK ORDERS	OVERDUE WORK ORDERS	OPEN ORDER VALUE (USD)
81.8%	17	3	63,030
Target 95.0%	Not shipped at the status date	Open past their due date	Order value of open work orders
Below target			

