

# Using the Project Dashboard

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## Overview

Dashboard views let managers quickly assess the project and deliverable performance using simple color coded indicators and key statistics.

Dashboard indicators compare current performance with management targets that are set for each individual project or deliverable.

In addition to the Project dashboard described herein, there is a request in that applications.

When you add the Project Observatory subsystem to your repository, it adds another collection of dashboards.

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## The Project Dashboard View

The Project Dashboard view is displayed to Notes users when the Repository or Projects navigator opens. Web users must click on the "Projects -Dashboard" item on the main menu to show this view.

The Project Dashboard provides a summary of the status of projects. It is organized by the program hierarchy, and some information is totaled at the program level. This is an extremely wide view containing many columns.

Each project row displays a set of colored indicators followed by a number of columns of project statistics. The view is designed so that projects that have potential overruns or implementation delays are easy to spot.

In the Notes client, use the horizontal scroll bar to reach the right side of the display. If the horizontal scroll bar is not displayed, use the Notes menu command View Show Horizontal Scroll Bar to make it visible.

Note: An option is available to the project manager that will exclude a project from the dashboard. As a result, some projects may not appear.

### ***The Dashboard Indicators***

In the columns titled "Time", "Progress", "Issues", and "Process" are colored indicators that visually depict the performance of the project against targets. Each indicator has several states indicated by different colors or symbols.

Note that the web display includes a visual legend at the bottom of each page. Notes' users can find a visual legend in the Online Guide.

### ***Time Indicator***

This indicator compares the end date of the latest assignment in the project with the target date set for this project (which can be either the last published schedule, the reference schedule, or manually entered)

- Green - Within target.
- Blue - Up to 2 weeks late.
- Red - 2 to 4 weeks late.
- Bomb - More than 4 weeks late

*Note: If the project is not finished and if the the Ends On date is in the past, then the indicator will show a bomb symbol even if the target is also in the past.*

### ***Progress Indicator***

This compares the work of activities which should have been done by now with the total work remaining in the project. This is the most sensitive indicator of project status since it will change as time passes, even though the schedule may appear green.

Note: In order to accommodate the natural delay created by weekly reporting in a timesheet system, the analysis evaluates assignment status using an as-of date set 7 days in the past. This is a conservative criterion that should accommodate any reasonable reporting situation. So, a green indication does not mean that there is no overdue work, it means that there was none according to the schedule through 7 days ago.

- Green - Normal approved project
- HourGlass - Project is On Hold
- Red X - Project has been Canceled
- Green Check - Project is Finished
- Blank - Project is Proposed

### ***Issues Indicator***

This compares the number of overdue open issues with the total number of open issues in the project. Note, an issue can only become overdue if it is given a due date. It is possible to open issues without setting due dates, or to set them so far into the future as to render this indicator meaningless.

- Green - No issues are overdue (or none exist)
- Blue - up to 50% of open issues are overdue
- Red - more than 50% of open issues are overdue

### ***Process Indicator***

The process indicator displays a traffic light icon to represent the condition of the project with respect to the requirements of the adopted processes.

If no processes have been adopted, the indicator is blank.

A ***Red traffic signal*** indicates that one or more process requirements are now overdue.

A ***Yellow traffic signal*** indicates that action will be required in the very near future, but nothing is yet overdue.

A ***Green traffic signal*** indicates that all process requirements have been complied with.

The details will be found in the Process Control Panel - Process Condition table row.

An more detailed and up to the minute analysis can be done using the "Process Condition" action in the Process Control Panel.

### ***The Dashboard Statistics***

#### ***EndsOn***

This is the latest date of the project. It is set as the latest due date for any issue or scope change or the project finish date as entered in the project profile, which ever is the later. This date is used to determine the setting of the Time indicator.

#### ***Issues***

This shows the number of overdue issues and the total number of open issues in the project. These numbers are used to set the issues indicator.

#### ***Scope***

This shows the number of overdue and open scope changes for this project.

#### ***Manager***

This is the name from the manager name field of the project profile.