

Dashboards

Overview

Dashboards are a fundamental tool for evaluating the status of projects, programs, and organizations. They provide a way to quickly recognize things that need management attention.

Observatory provides 8 primary dashboard views and several analysis views which use the dashboard format.

Dashboards communicate using color coded indicators. The choice of the colors and symbols is easily adjusted by the system administrator.

It is important to understand that all dashboards use the same symbology. For example, if a Project has a red ball Time Indicator in the Projects by Name view, it will also show a red ball in the Programs with Projects view and in the Projects by Ranking Factors view.

In the same way, if a Member shows a green ball in the Next Week Indicator of the Members by Name view, it will appear the same in the Organizations with Project Commitments view.

This chapter assumes that your system has the standard settings for dashboard symbology.

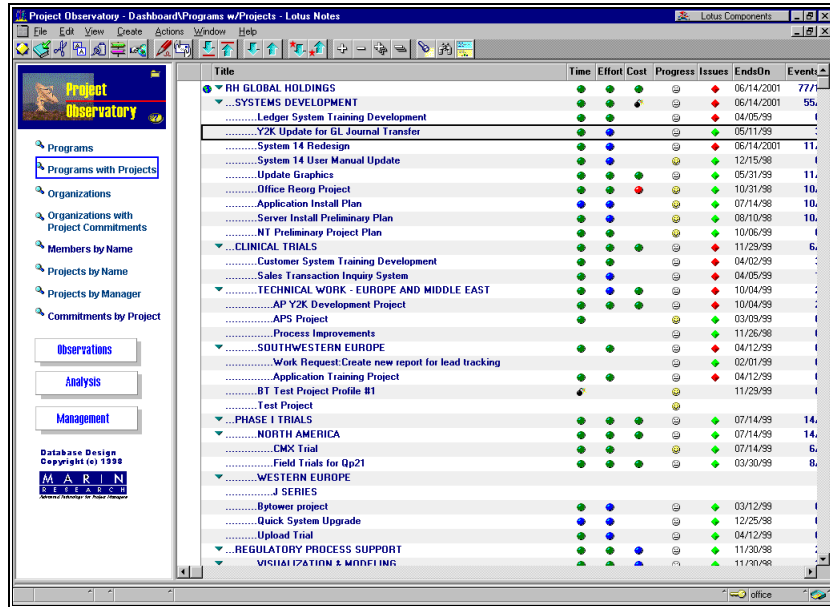
Goal Oriented Dashboards

This chapter will explain how to use the primary functions of the observatory to learn about the status of your projects and resources.

Programs

Programs with Projects

Projects by Name



These two views are identical except that the first shows only the hierarchy of program reports, while the second shows the programs and the project reports associated with each program.

Each line in these views corresponds to a specific report. You can open the report by double clicking on the line (Notes) or the hyperlink (Web).

At the far left you will see triangular "twisties" on rows that have child elements. By clicking these, the child sections will be displayed or hidden.

Also at the far left you will see one or more rows that begin with a globe symbol. This indicates a "top level" program.

Program & Project Dashboard Columns

The names of programs and projects are indented by "..." symbols to show the hierarchical relationship between them.

Color Coded Performance Indicators

Time

The time indicator compares the projected finish date of the project or program with its target. The color is green if within the target, blue if with 2 weeks, red if within 4 weeks, or a bomb if more than 4 weeks.

See the discussion of target setting later in this chapter.

Effort

The effort indicators compare the projected effort at completion of the project or of all projects in the program with its target. The color is green if within target, blue if within 115% of target, red if within 150% of target, bomb if greater.

Progress

The progress indicator compares the amount of overdue work (work that is scheduled in the past) with the amount of future work. It is happy if there is no overdue work, neutral if some work, but less than 50% of the remaining work, is overdue, and sad if more than 50% is overdue.

Issues

The issues indicator compares the number of overdue issues with the number of open issues on the project or on all the projects within the program. If there are no overdue open issues, then the indicator is green, if any are overdue then blue, if more than half of the open issues are overdue the indicator is red.

Statistics

Ends On

This is the projected finish date for a project, or the latest finish date of any project in a program.

Events

This displays the number of completed events vs. the number of defined events for the project or for all projects in the program. This is displayed as two numbers separated by a slash. 2/10 means that 2 out of 10 events have been marked complete.

Issues

This displays the number of overdue open issues vs. the number of open issues for the project or for all projects in the program. This is displayed as two numbers separated by a slash. 3/7 means that 7 issues are open, and 3 of them are overdue.

The screenshot shows the 'Project Observatory - Dashboard' interface. The main area contains a table with columns for various project metrics. The table is as follows:

Effort	Cost	Progress	Issues	EndsOn	Events	Issues	Outputs	Assigns	Done	Late	Current	Act Hrs	Rem Hrs	Act Hrs%	Total Hrs	Ref Hrs	Earned
06/14/2001	77/160	23/35	60/126	1122	455	56	14	15,315.0	23,654.9	34%	44,963.9	31,121.0	11.90				
06/14/2001	55/96	8/11	3/10	478	273	13	7	11,140.3	13,614.0	45%	24,754.3	18,721.0	7.57				
04/05/99	0/5	3/3	0/1	110	84	0	3	1,660.1	365.9	81%	2,046.0	1,985.0	1.64				
05/11/99	3/8	0/3	1/6	19	10	1	2	370.0	433.0	46%	803.0	840.0	371				
06/14/2001	11/14	3/3	0/0	167	45	12	2	4,832.9	9,497.0	34%	14,329.9	9,240.0	1.73				
12/15/98	0/0	0/0	0/0	2	2	0	0	109.0	0.0	100%	109.0	0.0	1				
05/31/99	11/21	0/1	1/1	0	0	0	0	31.2	282.2	10%	313.4	0.0	1				
10/31/98	10/19	0/2	1/2	0	0	0	0	375.0	0.0	100%	375.0	0.0	1				
07/14/98	10/10	0/0	0/0	70	70	0	0	2,016.0	0.0	100%	2,016.0	2,016.0	2.01				
08/10/98	10/10	0/0	0/0	62	62	0	0	1,752.0	0.0	100%	1,752.0	1,904.0	1.90				
10/05/99	0/9	0/0	0/0	46	0	0	0	3,016.0	0.0	0%	3,016.0	2,736.0	1				
11/29/99	6/23	21/21	47/61	309	131	10	6	3,142.0	5,498.0	37%	8,550.0	8,623.0	3.49				
04/02/99	3/7	5/5	0/0	117	72	7	2	1,102.0	1,037.0	52%	2,139.0	1,985.0	93				
04/05/99	1/4	6/6	1/4	22	5	0	2	141.0	800.0	15%	941.0	965.0	15				
10/04/99	2/7	9/9	0/4	57	20	2	0	1,418.3	1,944.0	42%	3,362.3	3,680.0	1.76				
10/04/99	2/4	9/9	0/0	37	19	2	0	1,410.3	1,464.0	49%	2,874.3	3,208.0	1.76				
03/09/99	0/3	0/0	0/4	18	1	0	0	8.0	464.0	2%	472.0	472.0	1				
11/26/98	0/0	0/0	0/0	2	0	0	0	0.0	16.0	0%	16.0	0.0	0				
04/12/99	0/5	1/1	0/0	113	34	1	2	481.0	1,636.0	23%	2,116.0	1,993.0	57				
02/01/99	0/0	0/0	0/0	2	0	1	0	0.0	75.0	0%	75.0	8.0	1				
04/12/99	0/5	1/1	0/0	110	34	0	2	481.0	1,552.0	24%	2,033.0	1,985.0	57				
11/26/98	0/0	0/0	0/0	1	0	0	0	0.0	152.1	0%	152.1	0.0	1				
11/29/99	0/0	0/0	0/0	0	0	0	0	0.0	0.0	0%	0.0	0.0	0				
07/14/99	14/46	0/2	5/23	335	51	33	1	1,032.7	10,546.9	9%	11,579.6	3,777.8	83				
07/14/99	14/28	0/2	5/17	0	0	0	0	206.3	7,537.5	3%	7,743.8	0.0	0				
07/14/99	6/12	0/1	0/5	0	0	0	0	131.3	4,462.5	3%	4,593.7	0.0	0				
03/30/99	0/16	0/1	5/12	0	0	0	0	75.0	3,075.0	2%	3,150.0	0.0	0				
03/12/99	0/3	0/0	0/3	19	0	1	0	0.0	0.0	0%	0.0	0.0	0				
12/25/98	0/6	0/0	0/3	17	0	4	1	0.0	404.0	0%	404.0	404.0	1				
04/12/99	0/9	0/0	0/0	299	51	39	0	826.5	2,061.4	29%	2,887.9	2,861.8	83				
11/30/98	2/3	0/1	5/12	0	0	0	0	0.0	150.0	0%	150.0	0.0	0				

Outputs

This displays the number of completed outputs vs. the total number of outputs planned for the project or program. This is displayed as two numbers separated by a slash. 5/12 means that 5 outputs have been completed out of the 12 anticipated.

Assigns

This displays the number of task assignments in the project or in all projects in the program. Not all project sources may report assignments, so this metric may not be comparable between projects.

Late

This displays the number of task assignments that should have been completed by now but which are still reported as being incomplete.

Act Hours

The displays the total number of actual work hours reported for the project or for all projects in the program. This column shows the total number of hours since the beginning of each project so it may include data from prior years.

Rem Hours

This displays the total number of planned work hours in the project or all project in the program. Some of these hours may have been planned for prior periods.

Act Hrs%

This is the percent that the Act Hours value is of the Total Hrs value shown in the next column. This is often a good metric for the degree of completion of a project or program.

Total Hrs

This column shows the sum of the Act Hrs and Rem Hrs for the project or for all projects in the program. This is often called the "Estimate at completion."

Ref Hrs

This column shows the total of the Reference (or Baseline) hours of the project or all projects in the program. Not all projects may provide reference plans, so this measurement may not be comparable across projects.

Earned Hrs

This column shows the number of Reference hours that are associated with completed work on the project or all projects in the program. Not all projects may provide this information.

Actual Cost

This column shows the actual cost reported by this project or by all projects in the program. Not all projects may report costs, and program managers should ensure that all projects use common methods for cost calculation if they are wish to use this information for project comparison or target management.

Manager

This column shows the email name associated with this project or program.

As Of

This column shows the date when this report was last updated.

Project Dashboard Views

Projects by Name

Projects by Manager

These two views list projects only. The first shows projects in alphabetical order, the second in groups based upon the name of the project manager.

Most of the columns shown in these views are the same as those described above, but there is a new column at the left that shows a color coded indicator for the project approval level.

Approved - Blank - No indicator.

Proposed - Blue

Approved Until or Hold - Yellow

Finished - Green Checkmark

Canceled - Red X

Hidden - Red Circle with diagonal line

Marked for Deletion - Red Circle with horizontal line

Resource Oriented Dashboards

There are four dashboard views

Organizations

Organizations with Project Commitments

Members

Commitments by Project

First, a definition of terms:

An **Organization** is intended to represent some defined part of your enterprise such as an engineering department. It is represented by an **Organization Report** document.

An **Organization Member Report** is a special kind of Organization Report that is defined to show the composite workload of a single individual or pooled resource (rather than a department)

A **Project Commitment Report** is a report detailing the workhours (and related data) for a particular resource on a particular project. A resource can be a person, a team, a department, a company ... it is defined by the project leader. Generally, however, project commitments are defined for individuals or teams.

One **Project Report** can have any number of **Project Commitment Reports** associated with it. When resources are added to projects, new Project Commitment reports are created. If resources are deleted from projects, then the corresponding Project Commitment Reports will be deleted. Each Project Commitment Report contains a doclink to the corresponding project and organization.

Project Commitment Reports are assigned by the observatory administrator to the appropriate organization. Once this is done, changes made in project commitments will be automatically incorporated in all higher level organization reports.

The Organization Dashboard View

Name

This column uses "..." symbols to show the logical ownership of items as well as twisties to expand and collapse the organization groups.

Note that project commitments are shown in lower case as "...resource in project". Organization Members are shown in First capital form, and Organizations are shown in Upper case.

Organization Name	1wk	+1wk	+4wk	+13wk	Progress	-4wks
▼ RH GLOBAL CARE LTD. 1						2467
▼.....RESEARCH HEALTH INC.						1611
▼.....CLINICAL PRODUCTS GROUP						695
▼.....FIELD MANAGEMENT						257
▼.....PLASMA CULTURE GROUP						438
▼.....NOVATO						273
▼..... Sam Adams						0
▼.....DOCUMENTATION						0
▼.....NOVATO						0
▼.....INFORMATION SYSTEMS						916
▼.....SAN JOSE LAB						916
▼.....Applegate Tom						30
▼.....Baker Carl						52
▼.....Barnes Debbie						16
▼.....Bonner George						165
▼.....Dale Smith						62
▼.....Davidson James						95
▼.....Forenz Arthur						139
▼.....Harrison Laura						126
▼.....Jacobs Carol						54
▼.....Joelle Vega						0
▼.....Jones Laura						172
▼.....Kristensen Margaret						4
▼.....RH EUROPE GMBH						856
▼.....MUNICH DEVELOPMENT LAB						856
▼.....ORGI						0
▼.....THE DAVIS CONSORTIUM						168
▼.....GROUP ORLY						80
▼.....Becky Trill						0
▼.....Roger Orlando						0
▼.....Sandy Sorel						0
▼.....Sarah Iii						32
▼.....Thomas Foranz						48
▼.....William James V						0

Member Indicator

This shows a "head and shoulders" icon for rows containing Organization Members.

Color Coded Capacity Utilization Indicators

Each of the next four columns display a colored ball indicating the relative demand of the resource vs. the capacity of that organization based upon the most recently provided project reports.

1wk - This shows the situation for the current week

+1wk - The situation for next week.

+4wk - The situation using the sum of the planned work vs. capacity of the next 4 weeks.

+13wk - The situation using the sum of the planned work vs. capacity of the next 13 weeks.

The color coding is as follows:

Green means that less than 75% of the capacity is utilized for the specified period.

Yellow (actually closer to a washed out green on most monitors) means that more than 75% but less than 101% is utilized.

Blue means more that 100% but less than 115% utilization.

Red means more than 115% but less than 150% utilization.

Bomb means more that 150% utilization.

"Blank" means that no capacity has been defined.

Progress Indicator

The progress indicator indicates the amount of scheduled but unfinished work for this commitment or organization as a function of the total planned work.

Happy - No overdue work.

Neutral - Some, but less than 50% of planned work is overdue.

Sad - More than 50% of planned work is overdue.

Other columns

-4wks - The total number of work hours (actual + planned) in the 4 weeks leading up to, but not including, the current week.

-1wks -The total number of work hours (actual + planned) in the week preceding the current week.

1wk - The total number of work hours (actual+ planned) in the current week.

+1wk - The total number of planned work hours in the week following the current week.

+4wk - The total number of planned work hours in the 4 weeks following (but not including) the current week.

+13wk - The total number of planned work hours in the 13 weeks following (but not including) the current week.

late(ytd) - The total number of work hours still scheduled since the beginning of the current year prior to the current week. This number should be near zero.

done(ytd) - The total number of actual work hours reported since the beginning of he current year.

TOTAL - The total of all actual and planned work hours for the commitment or organization over all time.

DONE - The total of actual work hours for the commitment or organization over all time.

TODO - The total of all planned work hours for the commitment or organization over all time.

Manager - The name of the organization manager.

AsOf - The date when the information was last updated. For project commitments this will be the date the last project abstract was received. For organizations it will be the date of the last recalculation.

Commitments by Project Dashboard View

It allows Project Managers to quickly check that resource commitments in their projects are properly classified and assigned to the correct organization.

The top level categorization of this view is by project name, so the first step when working with a large database is to collapse the view, find the project and then open that section.

Each resource assigned to the project is listed. Only the lowest level of the resource name is shown. Next to the name is the project status indicator which shows a colored ball to indicate the approval state.

This dashboard view shows assigned skills and assigned organizations along with the numeric columns found in the organization views. The capacity indicators are not displayed.