

# Using Dashboards

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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 and Deliverable dashboards described herein, there are request and costing dashboards in those applications.

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

### 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", "Effort", "Progress", "Issues", and "Process" are colored indicators that visually depict the performance of the project against targets. Each indicator has 4 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 latest assignment date (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.*

### **Effort Indicator**

This compares that total projected effort (actual hours plus work remaining) with the target effort set for this project (which can be either the last published schedule, the reference schedule, or manually entered.)

- Green - Within target
- Blue - 0 to 15% over target
- Red - 15 to 50% over target
- Bomb - more than 50% over target

### **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 - Work is being completed as scheduled
- Blue - Overdue work is 0-15% of remaining work
- Red - Overdue work is 15% to 50% of remaining work
- Bomb - More than 50% of the remaining work is overdue.
- 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 any assignment in the project. It may not be the "last" assignment in a critical path sense because users can modify assignment dates, and some assignments may not be linked. This date is used to determine the setting of the Time indicator.

#### ***Events***

This shows the number of completed events and the total number of key events in the project. Note that if a key event is assigned to several people, it will be counted several times. The value 3/7 means that 7 key events are defined, and 3 are marked complete.

#### ***Cklist***

This shows two numbers separated by a / character. The first is the number of completed checklist items and the second is the total number of checklist items in the project (including both the project checklist and assignment checklists.)

### ***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.

### ***Assigns***

This is the total number of assignment documents in the project.

### ***Done***

This is the number of assignments which are marked complete.

### ***Late***

This is the number of assignments which should be complete, but are not complete using the same lag criteria as used for the Progress indicator.

### ***Current***

This is the number of assignments marked as started, but not marked as finished.

### ***Act. Hrs.***

This is the total number of actual hours shown on all assignments of the project. It does not include hours that have been entered on unposted timesheets.

### ***Rem Hrs,***

This is the total number of hours of "Work Remaining" on all assignments of the project. It does not include changes that may have been entered on unposted timesheets.

### ***Act Hrs%***

This is the percentage of the total hours of the project that have been completed.

### ***Total Hrs.***

This is the sum of Actual and Remaining hours for the project. This is used to set the Effort indicator.

### ***Ref Hrs.***

This is the total number of work hours in the Reference plan for the project (the baseline).

### ***Earned Hrs.***

This is the number of hours of the Reference plan that have been "earned" by completing the activities to which they were assigned. For activities that are underway, this is the total reference effort times the

percent complete. The maximum value of this field is the Ref Hours of the project. By comparing the Actual hours with the Earned Hours, the manager can get a feel for how efficiently the project is being done.

### Manager

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

### The Deliverables Dashboard

The Deliverables Dashboard view shows the tree structure you have created with colored status indicators for each. This allows you to see the status of a very large effort at a glance.

Deliverable	Time	Effort	Events	Risk	Status	Steps Next	DueDate	Estimate	BAC	EAC
Active										
Service 21 Initiative	●	●			OK		06/01/2002	03/21/2002	15,000	
- Finance	●	●			Achievable		06/01/2002	06/02/2002	600	
- Documentation	●	●	0%		Flag		06/01/2002	11/15/2001	7,000	
- EndUser	●	●	50%		OK		03/26/2002	08/05/2001	500	
- Help Desk	●	●			Achievable		04/21/2002	03/21/2002	500	
- ISO 9001	●	●	0%		OK	0/5 Finish open...	04/01/2001	03/27/2001	900	
- Production Services	●	●			Future		11/01/2000	12/01/2000	2,000	
- Audit	●	●	0%		OK		03/01/2000	04/01/2000	200	
- Benefit Management	●	●	100%		Completed		11/01/2001	12/22/99	3,700	
- Employee Handbook	●	●	50%		Future		06/01/2002	12/18/2000	500	
- Online Handbook Site	●	●	40%			3/6 Setup filenames...	02/01/2002	12/18/2000	500	
- New Employee Systems	●	●			OK	2/5 Engineering...	12/01/2000	02/01/2000	600	

This view is divided into two primary sections: Active and Inactive. A first level Deliverable becomes inactive when is marked completed. At that time, the entire tree becomes classified as *InActive*.

The left column shows the title of each level of the deliverable tree with twisties allowing the tree to be selectively expanded or collapsed.

### Time and Effort Indicators

The two color balls labeled Time and Effort show the status of the goals of the deliverable against the target completion date and target effort at completion.

**Green Ball** - Time or Effort within target

**Blue Ball** - Time less than 2 weeks over target, Effort less than 15% over target.

**Red Ball** - Time more than 2 weeks but less than one month over target, Effort more than 15% but less than 50% over target.

**Bomb symbol** - Time more that one month late, Effort more than 50% over target.

### Key Events Indicator

If key events are attached to this deliverable, this shows the current percent complete of those events. If no events are attached, then this column is empty.

***Risk***

If there is a Risk Statement on this deliverable, an "eyeglass" icon appears in this column.

***Status***

This is a word or short phrase about the deliverable selected from a site customizable list.

***Steps and Next Step***

If a checklist is associated with this deliverable, the number of steps completed/total number of steps will be displayed. In the adjacent column, the first words of the description of the first uncompleted step are shown.

***DueDate and Estimate***

These are the target and estimated completion dates for this deliverable.

***BAC and EAC***

These are the target and estimated hours of effort at completion. Acronyms for "Budget At Completion" and "Estimate At Completion."

***Owner***

This is the person identified as the owner of the deliverable