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A Dash of Appeal

Richard Brunelli (December 18, 2008)

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Sexy or not, effective dashboards help project leaders quickly impart information to a range of audiences, from team members to executives to stakeholders — it's the 30-second elevator speech on a screen, customized for detail. And it's getting more advanced as dashboard developers consider user appeal as well as utility.

If People magazine decided to do a list of Sexiest Technologies Alive, project management dashboards most likely wouldn't make the cut. Since their beginnings, dashboards typically have been somewhat rudimentary tools that presented data in a relatively dry environment. They were, like their vehicular namesake, largely unnoticed and rarely compelling.

Sexy or not, effective dashboards help project managers impart — in a matter of minutes — critical project details and updates to team members and stakeholders. But now dashboards are adding user appeal to utility, thanks to advancements in technology.

"The biggest enemy for project managers is time," says Jason Westland, CEO and founder of Method123, which introduced ProjectManager.com, featuring a "dashboard on steroids," in July. "They don't have the time to look at all the details all the time. Therefore, they need a summarized analysis that will quickly tell them if the project is on track or not."

That need for speed when it comes to top-line, project-management information runs through many of today's newest strategies on dashboards. Take, for instance, the latest iteration of Clarizen's project-management solution, Version 2.5G, which was released in late November. The software-as-a-service tool allows a collaborative approach for the entire team to create interproject shortcuts, schedule updates and take advantage of the latest time-tracking and reporting systems. It also contains a Gantt viewer and can be integrated with data from a number of platforms, including Autodesk's AutoCAD, Solidworks and Microsoft Outlook.

Clarizen's offering also allows for as-late-as-possible scheduling; so-called "super user" permissions that enable certain users to check in on any projects without being formally assigned access; and the ability to set internal resource costs and project-specific rates.

"For busy executives, it's a way to keep tabs on many different aspects of a job without having to drill down immediately," says Guy Shani, vice president of sales for Clarizen. "We try to take a very advanced data-mining tool and bring it into one entry point."

The recently unveiled Daptiv PPM Winter 09 has all the expected drag-and-drop capabilities of most current dashboards, with a few interesting wrinkles. For one, the system makes use of Daptiv's Greenhouse, a social-networking component of sorts in which users can suggest changes to the product and then monitor the company's progress as it implements those changes. Another key upgrade, especially important for projects that span multiple countries, is a language selector that provides dashboard translations.

"Despite the fact that a lot of this is pre-built, we've anticipated that a lot of people still want to tweak things a bit," says Tim Low, Daptiv's vice president of marketing. "Our philosophy on dashboarding is that it's got to be relevant to everyone in the organization. So we've created an environment where data can be easily customized and users can determine what works best for them."

Daptiv's solution also includes what the company calls "Dynamic Applications" that capture a variety of types of information — from e-mail surveys to forms and fields within the Daptiv system — that are then fed into the reporting and dashboard features. The dynamic apps are designed so that they can be created by anyone and can be put into use immediately to get information into the system

"Whether you're a mid-level person or a CIO, you can start to use this system very quickly," Low says. "If you compare it with a lot of pre-packaged software, this is radically easier."

John Carrillo, the senior director of product strategy at Telelogic, an IBM company that creates dashboards and other project management tools, shares that philosophy of ease of use and flexibility: "Dashboards have become a really broad category; one size certainly does not fit all," he says.

Carrillo draws an analogy between project management dashboards and their automotive cousins. "When we jump into our cars we all see a dashboard," he says. "Some parts of that dashboard we understand and some parts we don't. We've found that when project managers present their work to non-project managers there was a similar situation. So we've developed a way to communicate all that information so that it resonates with everyone. And that way is through our dashboards."

The most recent manifestation of the Telelogic Dashboard, Version 3.5, features a simple interface for data entry and the ability for project managers to toggle between dashboard graphs and project information as well as the ability to aggregate data so that managers can keep tabs on a number of projects simultaneously.

Telelogic Dashboard 3.5 also features an innovation called Management by Exception, which uses an advanced filtering system to offer project managers a streamlined quantity of details and alerts them if certain actions need to be taken.

"This raises a flag or hits an exception when a certain threshold is crossed," Carrillo says. "So, if I'm the project manager, this gives me an early warning if something is starting to go off track. That way, project managers know about potential problems before they become full-blown problems."

Method123's ProjectManager.com has inked a licensing deal with Microsoft that integrates the site with the latest version of Microsoft Project. That association, Westland hopes, will be a key component to giving project managers the type of robust project management software they were looking for. "About 50 percent of this is working with the latest technologies to make it simple, dynamic and informative. The other 50 percent was making it all work with Microsoft Project," he says.

Another important piece of the puzzle was to create a system that allows project managers to be able to check the progress of their portfolios — or share details of that progress with colleagues — via the Internet. "These days, a project manager will often manage multiple projects at the same time. So we've created a portfolio view for their dashboard, allowing them to monitor the status of their entire portfolio of projects."