PROJECT – DashApp

Create a clean and super easy to use dashboard and to do list app that's supposed to be integrated with Google Apps and to start with Google Tasks and a coming new KPI's application. That helps the user to focus and do what's most important every day at the same time as he get's a quick business KPI status verification green/yellow/red based on how he's business KPI's is developing.

INTRODUCTORY INTERVIEW REPORT

1. The company is a mobile first agency that helps companies and organizations to mobilize their businesses by strategy advice, mobile development and mobile marketing and CRM services (A.1). The users that will use the DashApp have different profiles: Sales & Marketing, Project Leaders, Designers, Developers and Testers (A.2).

Comments:
- The DashApp will be used from users with different profiles and capabilities; therefore it should be simple to interact, have a core of functionality (i.e. to-do list of the tasks) standard for all the users and I would suggest personalized KPI depending on the profile or custom selected by the user.

2. The main goal of the DashApp will be to get a quick overview on the to-do list of tasks – not the details of the tasks (B.2) – in order to get more things done in time (A.5). The focus of the application is to help the users to write the tasks down and getting even more things done in time (B.1, B.3). It's very important to integrate the Google Tasks (A.4) and push the users to use this tool; indeed only a few employees are using Google Tasks today (A.3).

Comments:
- The main purpose of the DashApp is to help the users to have a quick overview on the tasks they have to complete during the day.
- It should be easy to write down a list of the task for the day and order them after their priority.
- The interface should present only the key attributes of the tasks; it should avoid detailed information about them.
- The interface should present the list of the task, the priority of each task, the deadline, and the estimated time to end the task (useful to estimate if the task is running out of schedule).
- With a quick overview the users have to be able to see which task is more urgent.
- The system should allow the user to take track of the time spent on each task, in this way the system can also show appropriate KPIs (i.e. estimated hours and actual hours spent for doing the task, time saved, extra time needed, percentage of the work done, time left to accomplish the task, etc.).

3. The company uses already the Google Apps and they want the DashApp as an extension of these tools and possibly as a widget in other dashboard apps (B.4).

Comments:
- Since this DashApp has to be as an extension of the Google Apps, and many tasks and deadlines are combined with the submission of reports or other documents share on Google Drive, it will be useful to integrate the possibility for the users to have a direct link to the documents connected to the tasks. For example if I have a deadline for submit a report of the meeting with the client, I'd like to have a link from the task to the document on Google Drive. In this way I save time and stress for find it. I can also track how many hours I spent for doing the report and find it quickly even later when is in the list of the closed tasks.
- It could be useful to show also the Google Calendar with the daily list of meetings, in this way the users can quickly add to their tasks list the upcoming events.

4. The KPIs are used inside the company only in the management, board of directors and on a dashboard screen in the developers' room (A.6). The KPIs relevant for the business listed by the client are: nr. & values of leads, nr. & values of offers, nr. & values of sales, nr. & values of orders, aggregated sales status compared to budget, debited hours in relation to available hours, time from reported to solved support and bugs issues, happy customer index (B.5).

Comments:
- The KPIs defined above are presenting all general indexes of the company results, although it's important to show also to the users their personal KPIs.
- The KPIs listed above are values important for Sales & Marketing profile users, but they are probably less valuable for other profiles of the company.
- KPIs should not only be used to control the performance and to show the objectives for each KPI, but they should also show the progress and, in this way, push the employees to do better their job. Therefore I suggest defining other KPIs specific for the different profiles of the company (i.e. for a Developer profile it will be nice to see some KPI that track his performances: number of tasks ended in time and number of deadline delayed over the total number, number of hour saved and extra-time spent for the tasks over the total amount of hours planned, etc. to compare with the standard of the company or with the best result between the developers). I also suggest to let the users chose their relevant KPIs and organize them in their dashboard (i.e. for a Sales & Marketing profile it will be nice to have a personal nr. & value of sales index, a personal nr. & values of orders, etc. to compare with the company indexes).

REQUIREMENTS

From a first analysis of the problem, the following are the main aspects relevant to the project:

- The interface should present a quick overview on the tasks.
- The interface should allow the users to order and organize their tasks' flow.
- It should be easy to interact with tasks: add them, sort them, and close them.
- The interface should avoid detailed information about the tasks.
- The key attributes of a task are: priority, deadline, and estimated time to end the task.
- The app should track and show the actual time spent for each task.
- The interface should alert the users that they are running out of time.
- The interface should present the overall number of tasks for the day and how many of them are: completed, planned, urgent, very urgent, late.

For the integration with Google Apps and Google Tasks:

- The interface should integrate Google Tasks allowing the users to see and edit his to-do list
- The interface should show the upcoming events and assignment's deadlines.
- The users should be able to share the Google Apps documents they have to submit along with the tasks deadlines.

Interface for the Project Manager users:

- They should be able to set and assign tasks to the members of their team.
- The interface should alert them if one member of the team is running out of time with a task.
- They should be able to set and update the properties of the tasks assigned (i.e. if a task become more or less urgent they can change the priority or they can change the deadline).
- They should have a quick overview of the work done by the other members of the team (i.e. the percentage of the completion of each task assigned, the delays, the problems that stuck the work, etc.).

The KPI overview:

- The KPI should present personal results for the users (i.e. number of tasks accomplished in time by the user), and global values for the company (i.e. number of project released in time by the company).
- The KPI should be used as a push for the employees to do better, showing them their good results and things they can improve.
- The KPI should be used also as indexes for high-level employees (i.e. Project Manager) to measure and evaluate the performance of the other employees.
- The interface should be customizable; the users can select and order the KPIs they find more interesting for them.

INTRODUCTION TO THE SCENARIO

Mobitech is a company with several employees. Each project manager co-works with a team of designers, developers, and copywriters. The company employees use the Google App and Google Tasks functionalities to coordinate their work. Although these services are very complete and functional for the company, the company decided to have a custom Dashapp that can help them to coordinate and lead the work of their employees, helping them to focus on the to-do list of the day and showing them the personal KPI achieved along with their work.

PERSONAS

Olof is the project manager of the company. He is 56 years old, passionate about technologies and very organized. He is spending a lot of his time planning the work for the developers, designers and copywriters of the company. He is confortable with Google Apps (i.e. documents, presentations, spreadsheets, and forms) and Google Tasks where he has his own to-do list for the day. Although Google provides him these tools, he needs a clean and simple interface that helps him to quickly see how the work of his colleagues is proceeding, share with them documents, comments, see if something is running out of the time schedule and send them priority messages.

Lily is a new web developer at Mobitech, she is only 24 years old, but very skilled and flexible. Her main routine is checking the documents/reports shared by Olof, analyze the comments received by the colleagues, then make her to-do list for the day and follow the flow of the tasks. When she codes she is very into the flow, therefore she often loose the track of the time spent for a task. She is also not enough experienced yet to know exactly how much time a task will require or witch task should have the priority. Co-working and sharing comments with her colleagues helps her to better understand how to organize her time.

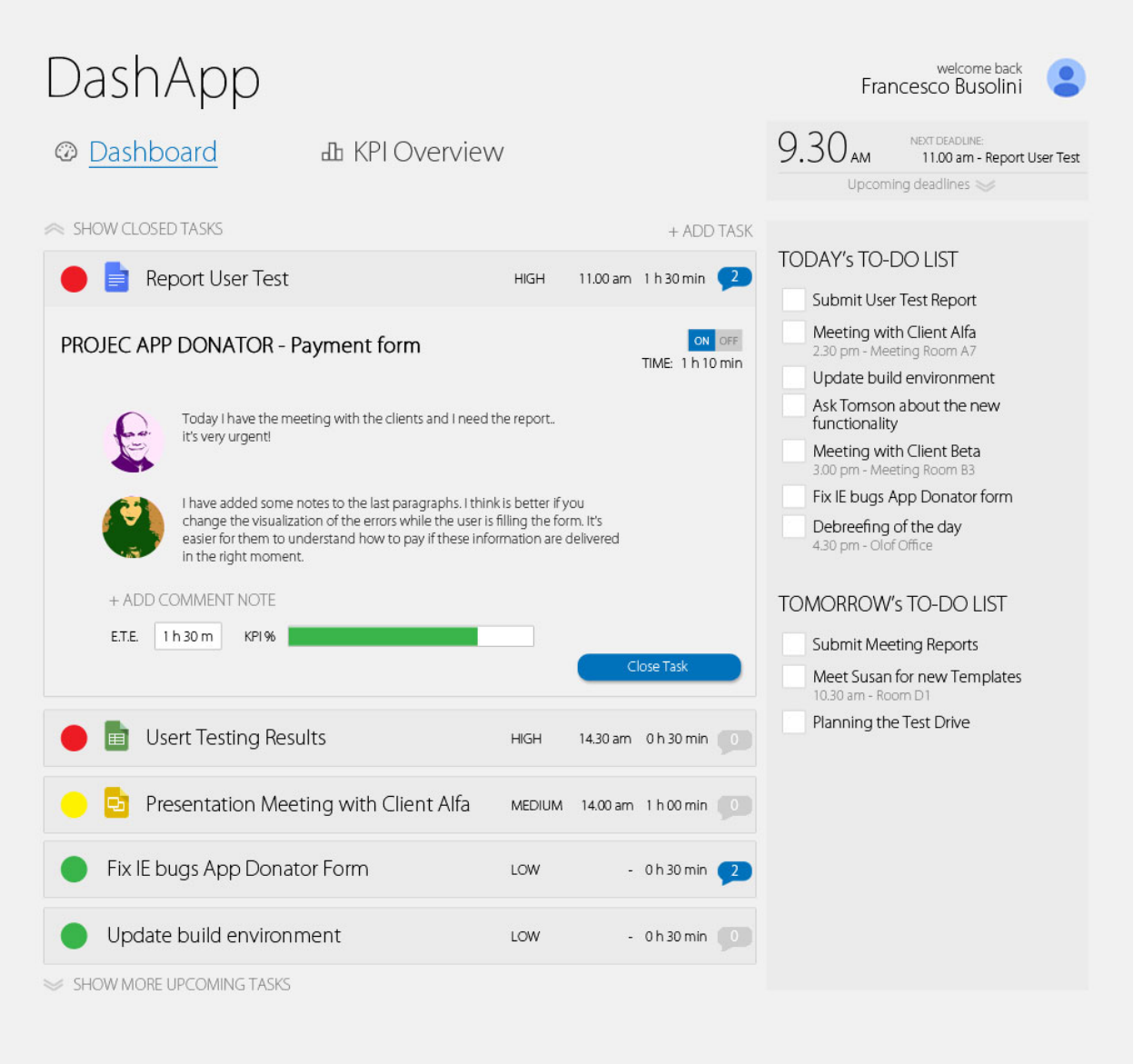
SCENARIO

1) Olof has just entered in the Dashapp and checked his tasks list. Today he has to receive from Lily the report of the user test executed at the beginning of the week. He wants also to proceed with the development of a new functionality of the system A. The client however has changed some details and Olof needs that Lily applies these changes for him before starting with the new functionality. Therefore he scroll the list of files shared to find the report. He adds a comment for Lily and changes the priority of the document to "urgent" and place a new deadline for this morning.

2) Lily log-in and takes a look to the time in her Dashapp. It's 8.05 am, the next deadline is at 11.00 am when she has to submit the report of the user test. She then takes a look to her to-do list of tasks. The morning is free; the first meeting with the client A is at 1.30 pm. She has also a second meeting with the client B at 3.00 pm. She will have a very short time between the meetings, therefore she should complete as much tasks as she can in the morning. Taking a look to the list of Google document shared, she sees that her project manager Olof has change the priorities of a report that is now prioritized as "urgent" and has a very short deadline. She decides to start with that one and postpone the submission of the user test. She puts the urgent report on the top of the list and starts the timer. She takes a quick look at the Olof's comment and starts working on the report.

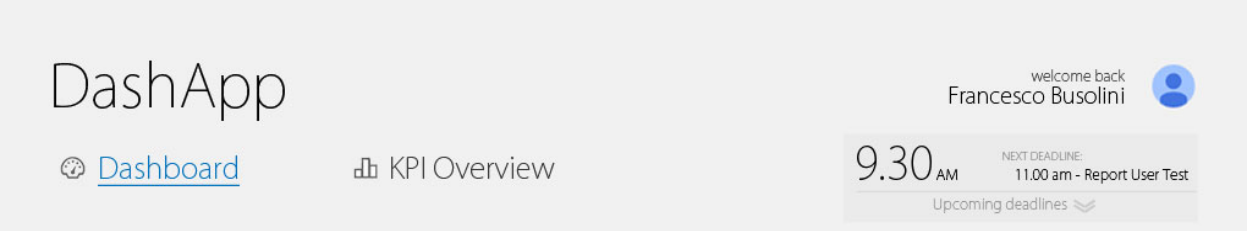
FIRST LAYOUT

This is a first layout of the desktop Dashboard of the DashApp application.



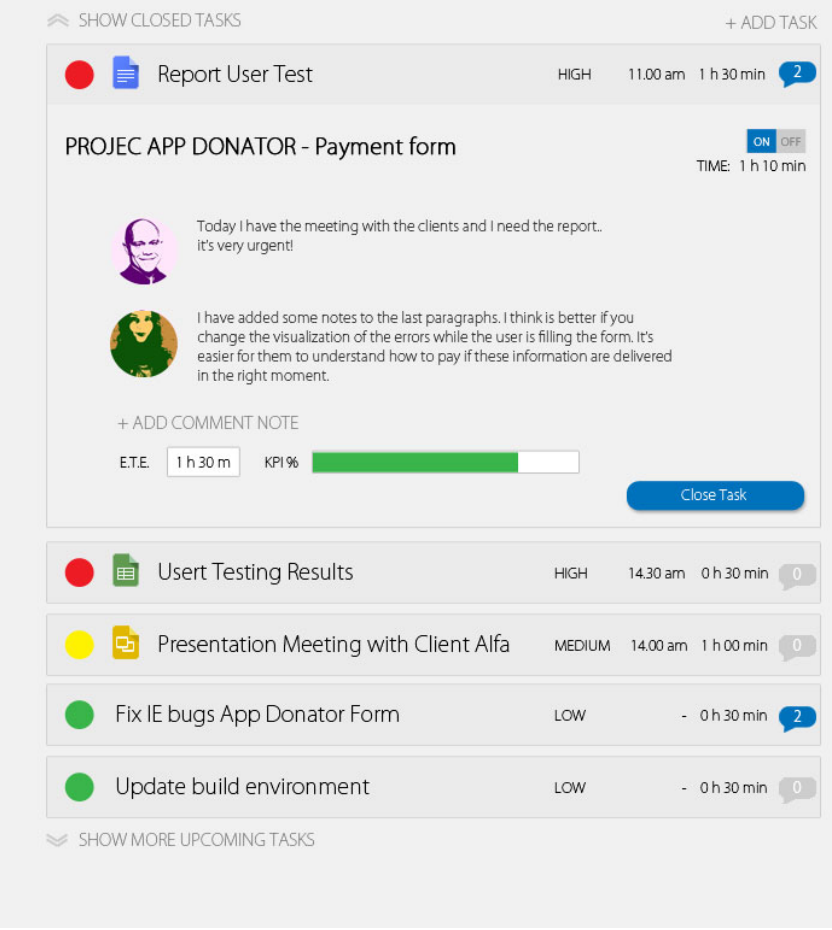
The DashApp interface is divided in two sections: Dashboard and KPI Overview. The Dashboard (presented in the layout above) contains the task-oriented information in order to get a quick overview on the to-do list of tasks and get more things done in time. The Dashboard is composed of three main areas: the header, the list of tasks and the integration of the Google Tasks list.

The header



The header contains on the left the Name of the application and the main menu. On the right is visible the log-in information, and in the right bottom part the box with the current time, next deadline and button for show a drop down list of upcoming deadlines.

The list of tasks



To help the user to focus on his urgent tasks the interface presents **5 to 9 tasks** at the same time. The interface hides closed tasks and other upcoming tasks.

The **navigation** is present on the top-left and bottom-left corners of this section. The users can reveal closed tasks, or show more upcoming tasks. Once a task is closed it will disappear and moved in the "closed tasks" list, and it will be replaced with a new upcoming task.

With the **button "+ add task"** on the right-top corner the user can quickly add to his list a new task.

For each task are always visible the following attributes: colored circle that indicates how urgent is the task, link to the document connected to the task (optional), name of the task, priority, deadline (optional), estimated time to end the task, number of comment notes added to the task.

Each task added has a **colored circle** that represents how urgent is that tasks (green/low – yellow/medium – red/high) in order to be completed in time. For example when the time left before the deadline is lower than the E.T.E. (estimated time to end the task), the color of the dot is red.

If the task requires submitting or preparing a document, the task in the list **presents an icon that links to the document**. In this way the user doesn't have to move from his dashboard to find the document needed to accomplish the task.

The **priority attribute** reminds to the users which task is more important to complete in the case two tasks are running out of time together. In this way it will be easy for the users decide on which task start to work and which task need to be delayed.

The **deadline attribute** of each task reminds to the user when the task should be closed and how much time is left to complete it. After the deadline is shown the **E.T.E.** in order to help the user to remember how much time he estimated it would take him to finish that task. This information are closed because the user can quickly understand how much time left he has before the time to complete the task will run out of time.

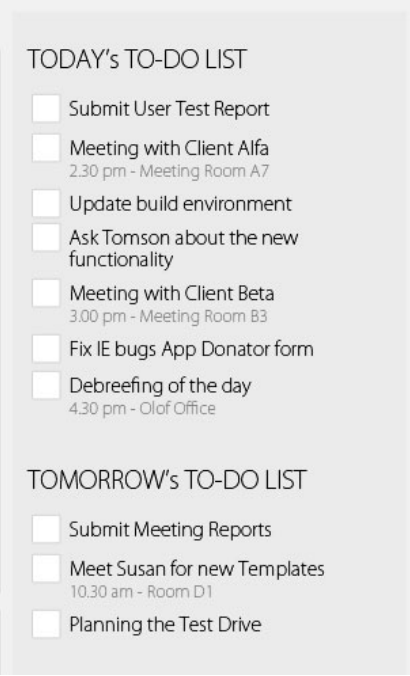
The last attribute is the **comment notes alert** that shows to the user how many notes he has attached to the task. It is useful to have all the important comments received for the task directly in the dashboard, in order to have a quick overview on the important details of the task and avoid forgetting them.

Only one task at the time can be open to disclose further details like: name of the project, a timer that track the time spent for the task, comment notes, estimated time to end the task, percentage of completeness.

The Google Tasks List

On the dashboard is also visible on the right side the Google Tasks List where the user can visualize and check the unsorted tasks of the day. I chose to present two lists. The today's and tomorrow's to-do lists.

In this way the user can always check if he can move a task that he is not able to complete in time to the day after. Or vice versa, he can move a task from the tomorrow's to-do list in the today to-do list if he has free time during the day.



Mobile Version of the DashApp

In the following images are presented the Dashboard and To-do List layouts for the responsive mobile version of the DashApp. In this case I decided to split the DashApp on three screens, adding the To-do List in the menu as a separate content, in order to have still a simple and focused user interface for the user.