
Staff Analysis Dashboard Requirements

Scope overview

The development requirement is to provide management with the means to easily analyse both the tasks completed by each team member but also to analyse the time spent working on each category and type.

The current method of analysis requires the data to be exported from our Sharepoint repository and inserted in an Excel spreadsheet so that graphs and tables can be enabled to display the required data.

This is both time consuming and prone to errors as the latest data may not have been exported and manual checks are required before and after each export.

As part of the drive to automate information reporting the current method of reporting and analysis no longer meets the company requirements and policy.

Design Requirements

- There should be 2 dashboards developed to provide the data required and both dashboards will need to pull data from a single csv or json file stored on the team storage drive.

It is accepted that, for the purposes of initial rollout and testing, that the source file would be stored locally to the dashboards and will contain known sample data so that testing results are validated to the expected outputs

- Both dashboards should fit a standard desktop display and all views should be enabled and confined to that viewing plane. Scrollbars or pop up screens are acceptable where required. It is not required that the dashboards be responsive to alternative devices or screen sizes as they will only be displayed on desktops and overhead displays
- The layouts and colour choices of each dashboard and graphs should, at least, compliment the current layouts represented by existing reporting platforms utilised by the team.
- A clear user instruction page or section (such as modal or similar) will be required as part of the intuitive nature of the page requirements. Each page should be logical and simple so as to require limited instruction to new users.

Reported Field Requirements

The source file will contain the following fields which will form part of the current and future development requirements.

The field list is;

Name

Date

Worktype

Priority

Platform

Zone (the zone field will apply to the phase 2 development release)

It is not necessary for any field notes or explanations as all users will be knowledgeable of these fields and their requirements of understanding.

Task Dashboard Requirements

The task dashboard is required to provide the following analysis functionality;

1. The main display will be row or bar chart in line with current reporting systems.
2. There will be a graph for Name, Worktype, Priority & Platform.
3. All graphs will have a filtering function to enable complete analysis on single or multiple fields and records.
4. Each graph will filter on the task records in the source file and all filtered displays will be a subset of this data.
5. Each selection should be displayed on the graphs, so the user is aware of that level of filtering has been applied during the analysis session.
6. There is the requirement to reset part or all selections to enable a new analysis session to commence.
7. The graph labelling will show a text indicator of the records displayed.
8. The 2nd display will be in tabular form and show all data as per the requirements in the 'Reported Field Requirements' section above.

9. The table is expected to filter the displayed data based on whatever selections are made on the graphs by users.
10. The page will contain a link to the 2nd dashboard and a user guide.

Time Dashboard Requirements

The task dashboard is required to provide the following analysis functionality;

1. The main display will be row or bar chart in line with current reporting systems.
2. There will be a graph for Name, Worktype, Priority & Platform.
3. All graphs will have a filtering function to enable complete analysis on single or multiple fields and records.
4. Each graph will filter on the time in the source file and all filtered displays will be a subset of this data. The time calculations should sum as appropriate to the analysis requirements.
5. Each selection should be displayed on the graphs, so the user is aware of that level of filtering has been applied during the analysis session.
6. There is the requirement to reset part or all selections to enable a new analysis session to commence.
7. The graph labelling will show a text indicator of the records displayed and there should also be a secondary label to show the time results of the filtered data.
8. The 2nd display will be a line graph and show all records as a line over time, it would be advantageous but not explicit that some sort of filtering or time selection be applied to the graph.
9. The line graph should filter the displayed data based on whatever selections are made on the graphs by users.
10. The page will contain a link to the 1st dashboard and a user guide.

Dashboard Deployment Requirements

The dashboards will be deployed in the team internal Sharepoint site and links to both dashboards should be enabled for user access.

The company access warning page requirement is unnecessary until such time that page access is expanded beyond team members as part of the future release plan.

It is understood that, for the purposes of the developer's education requirements, that the site will also be deployed as a GitHub repository and is permitted on the condition that only the agreed sample data file is sourced as part of this deployment.

Future development and releases

Phase 2

- A Google API will be applied to an existing or additional page and will display the 'Zone' data.
- The pages will be opened for use beyond the internal team members and the company access warning page will be applied as the index. The current index page will be renamed to task.html and an additional link added to the pages.
- Additional graphical displays to provide summary data for senior management will be scoped and developed as part of the Phase 2 rollout.

Phase 3

- Development of similar analysis pages will be offered to additional teams in the company and, if required, will be scoped and developed as part of the Phase 3 rollout.
- In Phase 3, the pages will be migrated from the internal Sharepoint site to a central html location for access by the company staff and management.

Dashboard Testing Matrix

The following testing matrix has been agreed with the manager requesting the dashboards and testing was manually completed by the team users of the dashboards. Results and comments are a collective response by the testing team.

Layout & Presentation

Test	Pass/Fail	Comments
Dashboards are well presented?	Pass	Dashboards are developed as per the specifications and read well
Background color scheme is acceptable?	Pass	Colour scheme matches company profile and renders on screen as expected
Menu Layout & navigation is logical?	Pass	Layout is intuitive and easy to navigate – no unnecessary text or functions
Graph color scheme is appropriate	Pass	Colors match existing graphical systems in the company and work well with the overall palette
Graphs and tables layout are presented well?	Pass	Graphical layout is good, and positioning means that all required data is always visible on screen
User guide is well presented and correct?	Pass	User guide is easy to access and use and the guide itself is intuitive and appropriate to the dashboard.

Functionality ---- Tasks Analysis Dashboard

Test	Pass/Fail	Comments
Data is present and correct?	Pass	Based on test csv submitted as source – all data is present.
Filtering on graphs is functional?	Pass	All graphs filter correctly and reset to original settings
Filtered results are correct?	Pass	The filtered results match the csv source file.
Table filters correctly?	Pass	The table correctly displays the filtered data and all csv source data is displayed in the table
User guide functions correctly?	Pass	The user guide opens, scrolls and closes as expected
Alternative dashboard link works correctly?	Pass	The link works as required
Table scroll is functional	Pass	The scroll function in the table works well and is also responsive to the filter option which was unexpected but a welcome addition
Reset functions works?	Pass	The reset function works and the option to reset optional selections also works
The selected count functions correctly	Pass	The count function works and displays the correct result on all filters

Functionality ---- Time Analysis Dashboard

Test	Pass/Fail	Comments
Data is present and correct?	Pass	Based on test csv submitted as source – all data is present.
Filtering on graphs is functional?	Pass	All graphs filter correctly and reset to original settings
Filtered results are correct?	Pass	The filtered results match the csv source file.
User guide functions correctly?	Pass	The user guide opens, scrolls and closes as expected
Alternative dashboard link works correctly?	Pass	The link works as required
Reset functions works?	Pass	The reset function works and the option to reset optional selections also works
Line chart filtering is correct?	Pass	The line graph filters as per requirements
Line chart brush function work correctly?	Pass	The brush function works as required
Bar chart labels are correctly displayed?	Pass	The labels are displayed well, are easily read and positioned correctly
Bar chart labels filter correctly?	Pass	All labels filter correctly for selection filtering and match the results expected from the source csv