



Standard Work

Title:	Project Dashboard Implementation and Use	Document Number & Revision:		0
Process Owner:	Project Management	Date of Revision / Last Review:	8/5/2014	

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Description of Revision:	Original Issue
Reference Documents:	



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1.0 PURPOSE: To describe the procedures for proper implementation and use of the Project Dashboard management tool.

2.0 SCOPE: This document applies to all personnel using and updating the Project Dashboard management tool, including but not limited to project managers and document coordinators.

3.0 DEFINITIONS:

Project Dashboard: The Project Dashboard is a project management tool. It comes in the form of an MS Excel spreadsheet, and makes use of both built in Excel functions and VBA code. The Dashboard is sized to print to a standard 11"X17" sheet of paper. The Dashboard is to be used by teams during meetings and other times to encapsulate and communicate the vital information about a given project.

4.0 GENERAL INSTRUCTIONS:

4.1 Headers

4.1.1 The data in the headers should be the first data entered into the dashboard. The two tables to the upper right of the dashboard include basic information on the project and who will be working on the project. This information must be entered manually into these tables. Figure 1 below shows these two tables:

	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP
1		Project Manager:									Customer:													
2		Doc. Coordinator:									End User:													
3		Elect. Engineer:									End Location:													
4		Engineer:									Customer P.O.:										Item No.:			
5		Designer:									Serial No.:										Model:			

Figure 1: Header Containing Basic Project Information

4.1.2 The second part of the header is where the project name and report date should be entered (see Figure 2 below). The project name and date of report must be manually entered. The report date should be updated every time the Project Dashboard is updated.

	A	B	C	D	E	F	G	H	I	J
1	PROJECT DASHBOARD									
2										
3	<i>Project Name</i>									
4										
5	Date of Report: MM/DD/YY									
6										

Figure 2: Header Containing Project Name and Date of Report

4.2 Project Financial Cash Management

4.2.1 When the dashboard is opened the Project Financial Cash Management table should look like this (see Figure 3 on the next page):



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7	PROJECT FINANCIAL CASH MANAGEMENT					
8	Bill & Payment			Dates		
9	Milestones	%	Amount	Sched.	Billed	Collected
10		(Enter)	#VALUE!			
11		(Enter)	#VALUE!			
12		(Enter)	#VALUE!			
13		(Enter)	#VALUE!			
14		(Enter)	#VALUE!			
15		(Enter)	#VALUE!			
16		(Enter)	#VALUE!			
17	Amount of the PO (ENTER TOTAL)					
18	LD's	Start Date	% per week *	Amount	* Sundyne only allows up to 5%	
19						
20						

Figure 3: Beginning Version of Project Financial Cash Management Table

- 4.2.2 The Bill and Payment Milestone names must be entered manually along with the dates of when the payment for each milestone is scheduled, billed to the customer, and collected from the customer.
- 4.2.3 The dates must be entered in the following format in order to fit with the cell: MM/DD/YY.
- 4.2.4 The percent of the total amount of the PO which is to be paid at the completion of each milestone is to be entered in the column under the “%” header. These values should be entered in as whole numbers, since the cells are already formatted to display their values as percentages. For example, if one of the cells is clicked upon and “5” is typed into the cell, the cell will display it as “5%”.
- 4.2.5 Next, the “Amount of the PO” must be entered, and from that the “Amount” which is to be paid at the completion of each milestone is automatically calculated using equations already present in these cells.
- 4.2.6 The smaller table underneath the “Amount of the PO” is the Liquidated Damages (“LD’s”) table. In this table the start date of when LD’s will accumulate and the percent per week must be entered manually. Again, the percent cell is already formatted to display percentages so type in the actual percentage.
- 4.2.7 The “Amount” of LD’s can be entered whenever a dollar value is known.

An example of what a completed Project Financial Cash Management table would look like is shown in Figure 4 on the next page:

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7	PROJECT FINANCIAL CASH MANAGEMENT					
8	Bill & Payment			Dates		
9	Milestones	%	Amount	Sched.	Billed	Collected
10	Return of Critical Docs	5%	\$12,500	7/18/14	7/21/14	8/1/14
11	Major Components	20%	\$50,000	8/14/14	8/20/14	8/31/14
12	Received Materials	25%	\$62,500	1/5/15	1/12/15	
13	Letter of Credit	45%	\$112,500	3/28/15		
14	Final Docs	5%	\$12,500	4/1/15		
15						
16						
17	<i>Amount of the PO</i>		\$250,000			
18	LD's	Start Date	% per week *	Amount	* Capped at 5%	
19		5/17/14	0.50%	\$1250/Week		
20						

Figure 4: Example of a Filled-in Project Financial Cash Management Table on Dashboard

4.3 Model Drawing

4.3.1 When first opening the dashboard, the Model Drawing box will look like Figure 5 below:

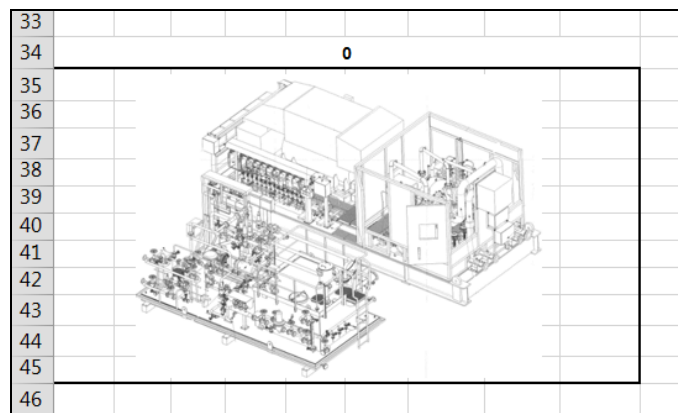


Figure 5: Beginning Version of the Model Drawing Box

The "0" above the picture will automatically change when the model number has been entered into the header.

4.3.2 The picture of the project's drawing must be obtained manually. Once a picture file of the drawing is obtained, crop the picture to limit the amount of white space. This can be done in excel by clicking on the picture and then clicking on the "FORMAT" tab that pops up (see Figure 6 on the next page).

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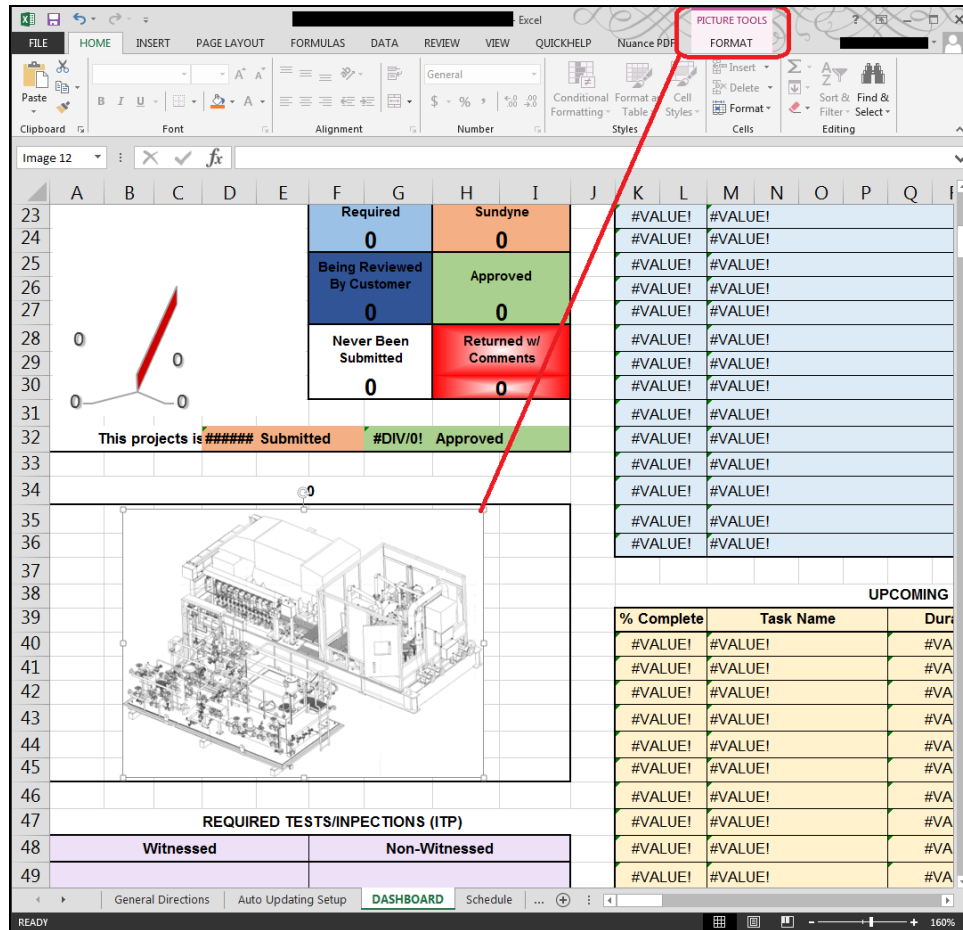


Figure 6: “FORMAT” Tab Displayed

- 4.3.3 After clicking on this “FORMAT” tab, the crop button is on the upper right side of the menu (see Figure 7 below)

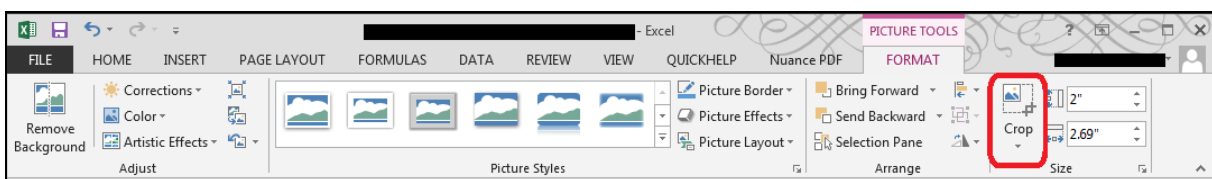


Figure 7: Highlighting Cropping Button

- 4.3.4 Once the picture is cropped, the last step is to change the height of the drawing and place it within the outlined box provided. To change the height of the picture, go the the “FORMAT” tab once again and change the upper left number to 2” (see Figure 8 on the next page).

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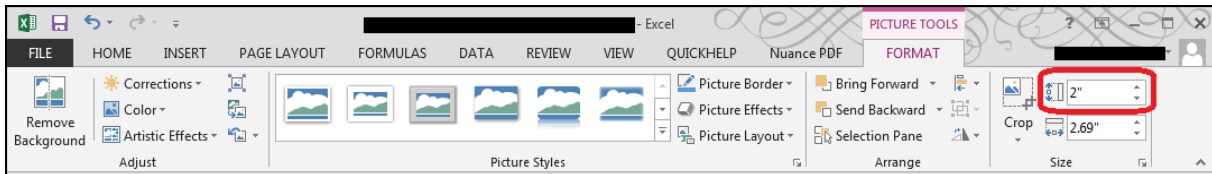


Figure 8: Highlighting the Picture Height Box

4.4 LOHS for Current and Upcoming Quarter

4.4.1 When the dashboard is opened, the LOHS section will look like Figure 9 below:

52	LOSH FOR CURRENT and UPCOMING QUARTER																				
53	M.E. RELEASE DATES		(Copy Dates Header From LOSH MASTER)										(Copy Dates Header From LOSH MASTER)								
54	PREDICTED	ACTUAL																			
55	UNIT	UNIT																			
56	KIT	KIT																			
57	mm/dd/yy	mm/dd/yy	(Copy From LOSH MASTER)																		
58	mm/dd/yy	mm/dd/yy																			
59																					

Figure 9: Beginning Version of the LOHS Section

4.4.2 The information needed is the quarter header, dates within quarter and the dates of activities within that quarter. All of this information can be copied directly from the LOHS Excel Document.

4.4.3 When the LOHS Document is opened you will need to copy the header and dates of the current and upcoming quarter, see Figure 10 below for an example:

BES								12/29/2014																													
A		B		C		D		E		AF AG AH AI AJ AK AL AM AN AO AP AQ AR AS AT AU AV AW AX AY AZ BA BB BC BD																											
SERIAL #		CUSTOMER		BOOK DATE		INCO/DEST CTRY		PM		QTR 3/2014														QTR 4/2014													
WO		MODEL		PROMISE DATE		UNIT ME RLS		ACTUAL UNIT ME RLS																													
TOTAL VALUE		LD's		PICK DATE		KIT ME RLS		ACTUAL KIT ME RLS		7/7	7/14	7/21	7/28	8/4	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/10	11/17	11/24	12/1	12/8	12/15	12/22	12/29		
		Fixed Modular Test Loop Modification																																			
C2321616-01		Tecumseh SpA/ Iowa Fertilizers		8/22/13		DAP/USA		Weed																													
3654605		LF2140		7/10/14		12/5/13		2/11/14																													
\$1,804,500.00		5%		8/25/14		12/20/13		2/28/14																													

Figure 10: Copying the Quarter Header and Dates from the LOHS

4.4.4 Next, paste these dates into the Dashboard. See Figure 11 below for an example:

52	LOSH FOR CURRENT and UPCOMING QUARTER																													
53	M.E. RELEASE DATES		QTR 3/2014														QTR 4/2014													
54	PREDICTED	ACTUAL																												
55	UNIT	UNIT	7/7	7/14	7/21	7/28	8/4	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/10	11/17	11/24	12/1	12/8	12/15	12/22	12/29		
56	KIT	KIT																												
57	mm/dd/yy	mm/dd/yy																												
58	mm/dd/yy	mm/dd/yy																												
59																														

Figure 11: The Quarter Header and Dates from the LOHS Put on the Dashboard

4.4.5 The next step is to copy the important activities for the next two quarters from the LOHS and paste them into the Dashboard (a normal CTRL+V will work). Figure 12 on the next page shows an example of this:

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52	LOSH FOR CURRENT and UPCOMING QUARTER																													
53	M.E. RELEASE DATES		QTR 3/2014													QTR 4/ 2014														
54	PREDICTED	ACTUAL																												
55	UNIT	UNIT	7/7	7/14	7/21	7/28	8/4	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/10	11/17	11/24	12/1	12/8	12/15	12/22	12/29		
56	KIT	KIT																10/20			11/15									
57	mm/dd/yy	mm/dd/yy																	1000 HP											
58	mm/dd/yy	mm/dd/yy																		2500 HRS										
59																														

Figure 12: The Important Activities from the LOHS Put on the Dashboard

- 4.4.6 The last bit of information which needs to be filled in is the predicted and actually M.E. Released Dates. These should be in the form mm/dd/yy, and can be entered as they are known.

Figure 13 below gives an example of a completed LOHS section:

52	LOSH FOR CURRENT and UPCOMING QUARTER																											
53	M.E. RELEASE DATES		QTR 3/2014														QTR 4/ 2014											
54	PREDICTED	ACTUAL	7/7	7/14	7/21	7/28	8/4	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/10	11/17	11/24	12/1	12/8	12/15	12/22	12/29
55	UNIT	UNIT																10/20				11/15						
56	KIT	KIT																	1000 HP									
57	2/13/14	3/29/14																										
58	3/28/14	6/4/14																		2500 HRS								
59																												

Figure 13: Example of Completed LOHS Section of Dashboard

4.5 Pressing Issues and Roadblocks

- 4.5.1 This section of the Dashboard is for any important information that does not appear elsewhere on the dashboard. This section should be updated frequently and may be used as talking points for informal meetings or reminders of important items that do not appear on the schedule.

Figure 14 below shows an example:

[illegible]

Figure 14: Filled In Pressing Issues and Roadblocks Section



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4.6 Required Tests/Inspections (ITP)

This section of the Dashboard contains information about the tests and inspections that are required by the project. This information should come from the project's Inspection Test Plan (ITP) and must be entered manually. See example in Figure 15 below.

47	REQUIRED TESTS/INPECTIONS (ITP)	
48	Witnessed	Non-Witnessed
49	Performance	Radiography - Case
50	4 Rour Run	Impellar Balance
51	Disassembly	Helium Leak Test
52		Lube Functional
53		Overspeed
54		
55		
56		
57		
58		

Figure 15: Witnessed and Non-Witnessed Tests and Inspections

5.0 **AUTO-UPDATING FEATURES:**

The Project Dashboard, if configured correctly, will automatically update to reflect upcoming and overdue documents as well as upcoming scheduled items. The pie chart section will also give up-to-date information on the overall status of documents. The Dashboard was designed to be as user-friendly as possible and should require only minimal updating time per week.

5.1 Documents

The next 14 upcoming and the 14 most overdue documents will be reflected in the documentation section of the Dashboard. Be aware that only the 14 MOST overdue documents will be shown, therefore any other overdue documents will not appear. The Project Dashboard tool is set up to work with the Standard SDI template. As will be explained, it can also be used with SDI's of other formats, but will require additional setup, and in some cases the Dashboard's automatic updating code will not be compatible with a given SDI format.

- 5.1.1 Open the SDI document. Select all rows containing documents by clicking and dragging the mouse over the row numbers on the far left of the MS Excel window. Copy these rows (CTRL+C).



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Title:	Project Dashboard Implementation and Use	Document Number & Revision:		0
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Sundyne Document Index						
Responsible Person	Critical Document?	Doc. Code	NAME OF DOCUMENT	Sundyne Document Number	Customer Document Number	STATUS
ME		D4	P&ID Drawing	D4- P&ID Drawing		A
ME		E3	Junction Box Diagram	E3-Junction Box Diagram		A
ME		F2	Unit Control Panel Wiring Diagram	SC01AYXX		C
ME		F3	Logic Diagram	LG01AYXX		C
YOU		G2	Instrument List	G2-Instrument List		C
YOU		G3	Purchased Spare Parts List	G3-Purchased Spare Parts List		
YOU		G4	Recommended Spare Parts List	G4-Recommended Spare Parts List		
YOU		H1	Compressor Datasheet	H1-Compressor Datasheet		
YOU		H3	Heat Exchanger / Lube Oil Cooler Data Sheets	H3-Heat Exchanger / Lube Oil Cooler Data Sheets		C
YOU		H4	Motor Data Sheets	H4-Motor Data Sheets		C
YOU		H5	Instrument Data Sheets	H5-Instrument Data Sheets		C

Figure 16: Copy the document rows from the SDI.

5.1.2 Navigate to the Dashboard window. Select the sheet labeled "SDI".

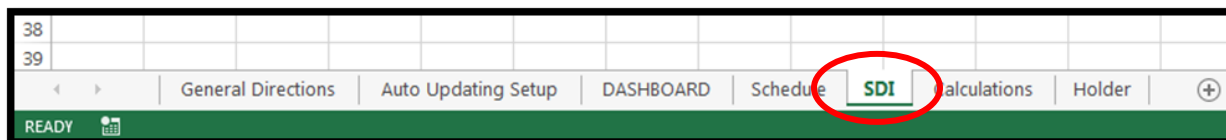


Figure 17: Select SDI sheet in the Project Dashboard file.

5.1.3 Paste the copied rows into the "SDI" sheet in the first cell. **Important:** The cells must be pasted **as values**. Otherwise, Excel will likely freeze.

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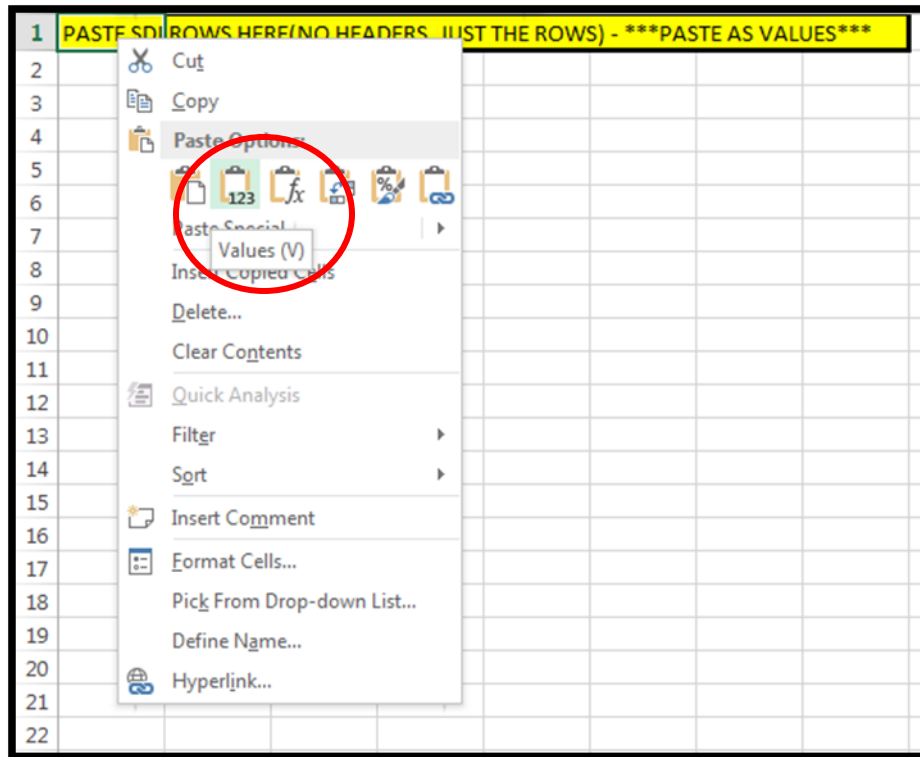


Figure 18: Paste the SDI data as *values* into the “SDI” sheet.

- 5.1.4 Now all important document information has been copied from an up-to-date SDI to the Dashboard. This needs to be done each time the dashboard is updated. When updating the Dashboard, make sure to delete all data in the “SDI” sheet before copying in new SDI data.
- 5.1.5 Now force Excel to recalculate all sheets by pressing CTRL+ALT+F9. This will run all of the VBA functions and should populate the Upcoming and Overdue Documents section.
- 5.1.6 If the SDI has been modified from the standard template, or if an alternative format is being used, and the Documents section does not populate, go to the “Calculations” sheet.
- 5.1.7 Note: In this version of the Project Dashboard, the document tracker pie chart is only configured to work with data from the Standard SDI format. If another format is used, the pie chart section can be either updated manually or used for some other kind of data.



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Upcoming Schedule Items:					Documents					Overdue		Upcoming	
Row	Name Column	Fin Date Column	% Column	Start Date Col	Duration Column	SDI Format:	Format	SDI Due Date Column#	Document Desc Colm #	Doc Code Column #	Doc Status Column #	Doc Person Responsible Column #	
0		0				<input checked="" type="radio"/> Standard SDI							
1		0				<input type="radio"/> SDI 2013C							
2		0				<input type="radio"/> Other Format							
3		0				*To be Moved*							
4		0											
5		0											
6		0											
7		0											
8		0											
9		0											
10		0											
11		0											
12		0											
13		0											
14		0											
15													
16													
17													
18													
19													
20													
21	***The yellow fields should update automatically.												
22													
23	***DO NOT MOVE COLORED BOXES OR RENAME SHEETS!!***												
24													
25													
26													
27													

Figure 19: Changing documents column information in the "Calculations" sheet.

- 5.1.8 Manually enter the column numbers of the document Due Date, Description, Code, Status, and Person Responsible, as they appear in the copied SDI data (in the "SDI" sheet of the Dashboard workbook). The Dashboard is originally set up to have the column numbers of the Standard SDI format, but these columns can be changed.
- 5.1.9 Note: If the SDI contains due dates in various columns, the Project Dashboard is not able to automatically update the documents section. It may be possible to edit the data in the "SDI" sheet to get all dates in one column. Otherwise document data will have to be entered manually. Also, in the "Calculations" tab, Standard SDI must be selected under "SDI Format" or the auto update feature will be disabled.
- 5.1.10 Always force Excel to recalculate all sheets after making any changes by pressing **CTRL+ALT+F9**.
- 5.1.11 Remember that data in the SDI sheet can be sorted and edited to remove documents that are not desired to appear on the Dashboard.

5.2 Upcoming Deadlines

The Upcoming Deadlines section of the Project Dashboard pulls information from the project schedule to inform about schedule items with the next 10 upcoming finish dates. Note that it will not indicate schedule items that are still in progress but for which the finish date has passed. In this case the finish date on the schedule should be modified. Unless the project schedule



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document is modified, the Upcoming Deadlines section of the Dashboard will stay current automatically. Therefore unlike the Documents section, this section will does not require attention during regular dashboard updates, but only requires an initial setup (unless the project schedule is altered).

- 5.2.1 Open the schedule in Microsoft Project. Note: If another software has been used for the project schedule, the Dashboard is not configured for automatic updating. Copied data may have to be modified.
- 5.2.2 Select the empty header box in the MS Project window to in the upper-left corner (shown in the darker shade of green in the picture below). This will select all of the data in the schedule. Copy it.

	% Co ▾	i	Task Name ▾	Duration ▾	Start ▾	Finish ▾	Predec	July 21 7/7	8/11	October 1 9/15	10/20	December 11 11/24	12/29	February 2/2	3/5
0	25%		▲ C2359934-01-04 Project Schedule	304.5 days	Tue 12/3/13	Fri 2/27/15									
1	53%		▲ Schedule Milestones	304.5 days	Tue 12/3/13	Fri 2/27/15									
2	100%	✓	Book Order	0 days	Tue 12/3/13	Tue 12/3/13									
3	100%	✓	LOI Acknowledgement	2.5 wks	Tue 12/3/13	Thu 12/19/13	2								
4	100%	✓	Contract Acknowledgement	2.3 wks	Thu 12/19/13	Tue 1/14/14	3								
5	100%	✓	Order Unit LL	10 days	Wed 5/7/14	Thu 6/26/14	15								
6	0%		Order Kit LL	0 days	Fri 6/20/14	Fri 6/20/14	44SS								
7	0%		Release to ME	0 days	Mon 9/15/14	Mon 9/15/14	13								
8	0%		Shipping Date	0 days	Fri 1/16/15	Fri 1/16/15	58								
9	0%		Final data	6 wks	Fri 1/16/15	Fri 2/27/15	8								
10	43%		▲ Engineering	209 days	Tue 12/3/13	Mon 10/6/14									
11	0%		▲ Project Management	55 days	Fri 6/27/14	Mon 9/15/14									

Figure 20: Copy the project schedule into the “Schedule” sheet.

- 5.2.3 Paste the schedule data into the “Schedule” sheet of the dashboard. Note that the bar graph will not be copied. Recalculate the sheets by pressing **CTRL+ALT+F9**. The Upcoming Deadlines will automatically update from now on based on the data copied from the project schedule. 3
 - 5.2.4 If the schedule was created using a software other than MS project, copy data similarly and make certain that the column headers are identical in name to the MS project format (i.e. “Task Name”, “Duration”, “% Complete” etc.) Regardless of choice of software, the order of the columns is not important.
- 6.0 END