

Help Users Love Your Apps: Create Custom Dashboards

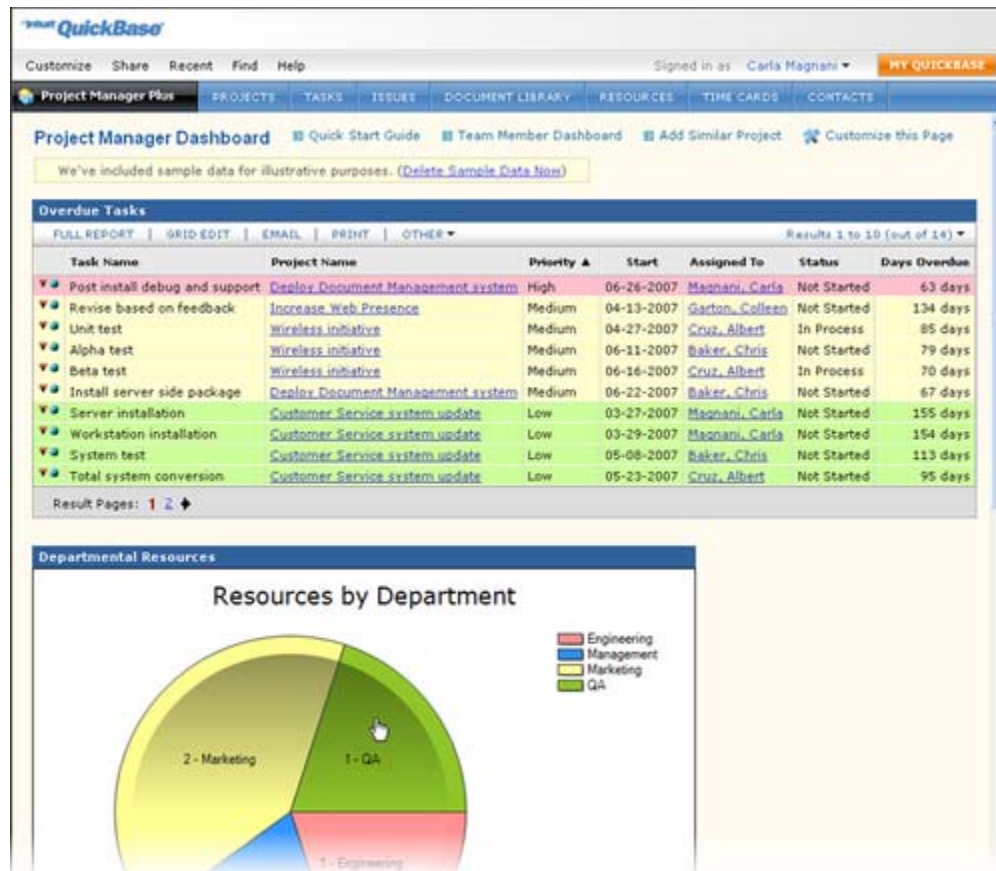
Would you like to design applications that your colleagues will beg you to use? Not long ago, Peter Fearey wrote an excellent post entitled [Helping Users Love your Apps](#). Today's post is the first in a series of follow-ups that will expand on his thoughts. If you implement all these tips, working in your application will be a pleasure and not a chore.

What's the first page your users see? It's the Application Dashboard, which is essentially the "home page" of your application. By creating a smart and informative dashboard (or many) you can save your colleagues loads of time. In fact, I've seen applications where users can tackle all their jobs from this single screen.

Customize by Role

Start by asking yourself what each user needs to see. Usually, this need breaks down by role. For example, executives may want to see overall status on many projects, but an individual staff member is only interested in what tasks he must perform today. In this situation, [create](#) a different dashboard for each type of user. QuickBase lets you [designate one of these dashboards as the "home page" for each role](#). (You can even create multiple dashboards for each role, which you'll read about in a minute.)

For example, show this dashboard to executives:



and show this dashboard to team members:

The screenshot shows a QuickBase dashboard titled "Team Member Dashboard". It includes a navigation bar with "Project Manager", "TASKS", "ISSUES", "DOCUMENT LIBRARY", and "RESOURCES". The dashboard is signed in as "Carla Magnus" and has a "MY QUICKBASE" button. A note states: "We've included sample data for illustrative purposes. (Delete Sample Data Now)".

Tasks Assigned to Me

| Priority | Task Name | Duration (Days) | Start | Planned Finish | Predecessors | Status | Percent Complete | Days Overdue | Actual Finish Date |
|----------|-----------|-----------------|------------|----------------|---------------|-------------|------------------|--------------|--------------------|
| UPST | Medium | 3 | 02-12-2008 | 02-14-2008 | AS 22, 23 | Started | 95% | | |
| UPST | Low | 14 | 04-25-2008 | 05-14-2008 | AS 23, 22, 24 | Not Started | | | |
| UPST | Low | 3 | 05-22-2008 | 05-26-2008 | AS 25, 22 | Not Started | | | |
| AVG | | | | | | | 32% | | |

Issues Assigned to Me

| Priority | Issue Name | Description | Due Date | Status | Updates | Date Resolved | Resolution |
|----------|------------|---|------------|--------|---------|---------------|------------|
| UPST | Med | Content is incomplete in relation to sitemap. Will take final outline and collaborate with sitemap development checking navigation. | 11-15-2007 | Open | | | |

All Open Tasks

February 2008

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |

Tasks are color-coded: blue for "Requirements (Magnus, Carla)", yellow for "Back-end Structure (Cruz, A...)", and green for "Content (Barton, Colleen)".

Customize by User

Customization doesn't stop at roles. Someone recently wrote in and said "I see how to customize by role, but how do I create custom dashboards for each user? I don't want to see my colleague's to do list, only my own."

To accomplish this, just [create a report that automatically shows the current user only those items that pertain to her](#) and embed that report on a common dashboard. The result? - A dashboard that's custom fit for each individual user.

For example, Sales Rep Wilbur Forbes would see this:

QuickBase

Customize Share Recent Find Help

Manage Your Sales Team COMPANIES CONTACTS OPPORTUNITIES ACTIVITIES SALES REPS

Signed in as: Wilbur Forbes

Sales Representative Dashboard

We've included sample data for illustrative purposes. [Delete Sample Data Now!](#)

Customize this Page

Reports

Companies

- Chart of Won Deals by Company State
- List All
- List Changes
- Win/Loss Report by Company

Contacts

- All Contacts by Categories
- All Contacts by Country
- All Contacts by State
- By Categories (Pie Chart)
- By Country (Pie Chart)
- By State (Pie Chart)
- Contacts by Company
- Contacts for a Company
- Embedded Contacts View
- List All
- List Changes

Opportunities

- Active Open Opportunities by Company
- Chart of Total Future Pipe by Rep
- Closed Deals Per Rep for Current Period
- Closed Deals This Period
- Closed Deals Versus Plan
- Convert Leads to Deals
- Deals On Hold
- Embedded Opportunities for Activities Form
- Future Pipe by Period
- Line Chart of Rep Closed Business
- List All
- My Chart of Closed Deals
- My Opportunities by Last Touch

My Activity List

FULL REPORT | GRID EDIT | EMAIL | PRINT | OTHER

Results 1 to 7 (out of 7)

| Scheduled Date/Time | Activity Type | Notes | Opportunity - Title | Activity Status |
|---------------------------|---------------|--|---------------------------|-----------------|
| 09-18-2007 11:11 AM (PDT) | Sent Proposal | Need to send proposal on C3 unit | Amert Production Design | Scheduled |
| 09-23-2007 01:11 PM (PDT) | Phonecall | Follow up on inquiry | Amert Production Design | Scheduled |
| 10-04-2007 09:11 AM (PDT) | Phonecall | Present to Peter Tiet - CFO | GMX Deluxe Unit | Scheduled |
| 10-05-2007 10:11 AM (PDT) | Live Meeting | I need to send quote by this date in order to meet their deadline. | GMX Deluxe Unit | Scheduled |
| 10-06-2007 08:41 AM (PDT) | Sent Quote | | Circuit Boards for PB1123 | Scheduled |
| 10-08-2007 08:41 AM (PDT) | Phonecall | Check on Contract Status | Amert Production Design | Scheduled |
| 10-09-2007 11:11 AM (PDT) | Phonecall | Follow up on PD? | Amert Production Design | Scheduled |

My Pipeline

FULL REPORT | GRID EDIT | EMAIL | PRINT | OTHER

Results 1 to 4 (out of 4)

| Opportunity Title | Deal Size (\$) | Confidence Level | Opportunity Status | Last Completed Action | Add Activity | Forecast Close Date |
|-----------------------------------|----------------|------------------|--------------------|-----------------------|--------------|---------------------|
| GMX Deluxe Unit | \$721,250 | 100% | Active Opportunity | | Add Activity | 12-18-2007 |
| Circuit Boards for PB1123 | \$44,750 | 70% | Active Opportunity | 10-26-2007 | Add Activity | 01-11-2008 |
| Services on T-28 Space Vaporators | \$55,250 | | On Hold | | Add Activity | 03-13-2008 |
| Amert Production Design | \$47,500 | | Active Opportunity | | Add Activity | 04-13-2008 |
| TOT | \$878,750 | | | | | |
| AVG | \$219,688 | | | | | |

My Chart of Closed Deals

and Sales Rep Ida Sloper sees this:

QuickBase

Customize Recent Find Help

Manage Your Sales Team COMPANIES CONTACTS OPPORTUNITIES ACTIVITIES SALES REPS

Signed in as: Ida Sloper

Sales Representative Dashboard

We've included sample data for illustrative purposes. [Delete Sample Data Now!](#)

Customize this Page

Reports

Companies

- Chart of Won Deals by Company State
- List All
- List Changes
- Win/Loss Report by Company

Contacts

- All Contacts by Categories
- All Contacts by Country
- All Contacts by State
- By Categories (Pie Chart)
- By Country (Pie Chart)
- By State (Pie Chart)
- Contacts by Company
- Contacts for a Company
- Embedded Contacts View
- List All
- List Changes

Opportunities

- Closed Deals This Period
- Closed Deals Versus Plan
- Deals On Hold
- List All
- My Chart of Closed Deals
- My Opportunities by Last Touch
- My Pipeline
- My Won Opportunities by Period
- Pie Chart of Current Period Pipe by Sales Rep
- Take Sample User's Deals

My Activity List

FULL REPORT | GRID EDIT | EMAIL | PRINT | OTHER

Results 1 to 4 (out of 4)

| Scheduled Date/Time | Activity Type | Notes | Opportunity - Title | Activity Status |
|---------------------------|---------------|-----------------------------------|---------------------------|-----------------|
| 09-13-2007 11:11 AM (PDT) | Sent Proposal | | ProServer Upgrade | Scheduled |
| 09-24-2007 03:11 PM (PDT) | Sent Quote | | RX Package | Scheduled |
| 10-02-2007 11:11 AM (PDT) | Sent Proposal | Need to send proposal for 4 sites | RX Package Implementation | Scheduled |
| 10-08-2007 08:41 AM (PDT) | Phonecall | Check on Contract Status | RX Package Implementation | Scheduled |

My Pipeline

FULL REPORT | GRID EDIT | EMAIL | PRINT | OTHER

Results 1 to 3 (out of 3)

| Opportunity Title | Deal Size (\$) | Confidence Level | Opportunity Status | Last Completed Action | Add Activity | Forecast Close Date |
|---------------------------|----------------|------------------|--------------------|-----------------------|--------------|---------------------|
| ProServer Upgrade | \$17,750 | 70% | Active Opportunity | | Add Activity | 12-14-2007 |
| RX Package | \$55,250 | 100% | Active Opportunity | | Add Activity | 03-07-2008 |
| RX Package Implementation | \$47,500 | | Active Opportunity | | Add Activity | 04-13-2008 |
| TOT | \$120,500 | | | | | |
| AVG | \$40,167 | | | | | |

My Chart of Closed Deals

Although they are both looking at the "same dashboard," each one sees only his or her own activities and opportunities. Embedding these user-specific reports is a great way to cut through all the data and show your users only those items that interest them.

Display important messages and guide users

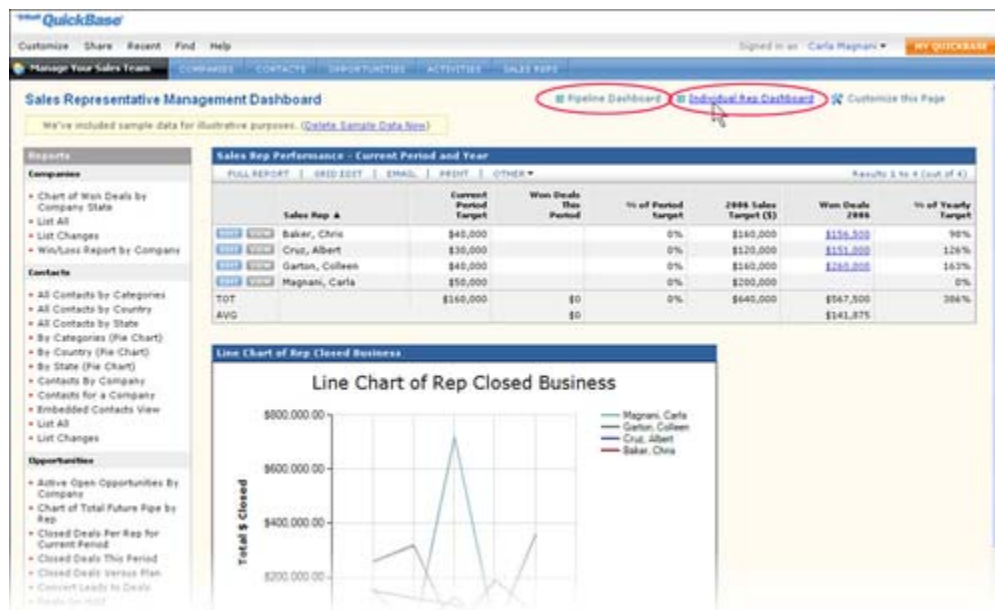
Does your staff have trouble communicating? Help everyone out by telling them stuff they need to know. Do so directly on the dashboard. [Text sections](#) let you post messages and/or instructions. You can format these missives any way you wish--in huge red font or discreet tiny gray font--whatever's appropriate. You can even include hyperlinks to pages in your application or out on the Web.

The screenshot shows the QuickBase interface for a project named 'System Installation Project'. The dashboard includes a sidebar with navigation links like 'Reports', 'Tasks', and 'Issues'. The main content area features a 'Project News' section with a message about weekend testing, a 'Quick Links' section with links to 'Vendor's Web site' and 'See the Schedule', and an 'Overdue Tasks' table. The table lists tasks such as 'Follow-up w/ local vendor', 'Server purchase', 'Workstation purchase', 'Post install debug and support', and 'Arrange switchover date', each with details on priority, start date, assigned person, status, and days overdue.

| Project Name | Priority | Task Name | Start | Assigned To | Status | Days Overdue |
|-----------------------------|----------|--------------------------------|------------|------------------|-------------|--------------|
| System Installation Project | High | Follow-up w/ local vendor | 12-16-2006 | Baker, Chris | Not Started | 420 days |
| System Installation Project | High | Server purchase | 01-04-2007 | Pierrepont, Otto | In Process | 393 days |
| System Installation Project | High | Workstation purchase | 01-11-2007 | Baker, Chris | In Process | 364 days |
| System Installation Project | High | Post install debug and support | 02-10-2007 | Pierrepont, Otto | Not Started | 364 days |
| System Installation Project | Medium | Arrange switchover date | 12-11-2006 | Baker, Gregory | In Process | 408 days |
| System Installation Project | Medium | Test tool | 11-11-2006 | Choi, Albert | In Process | 418 days |

When one dashboard's not enough

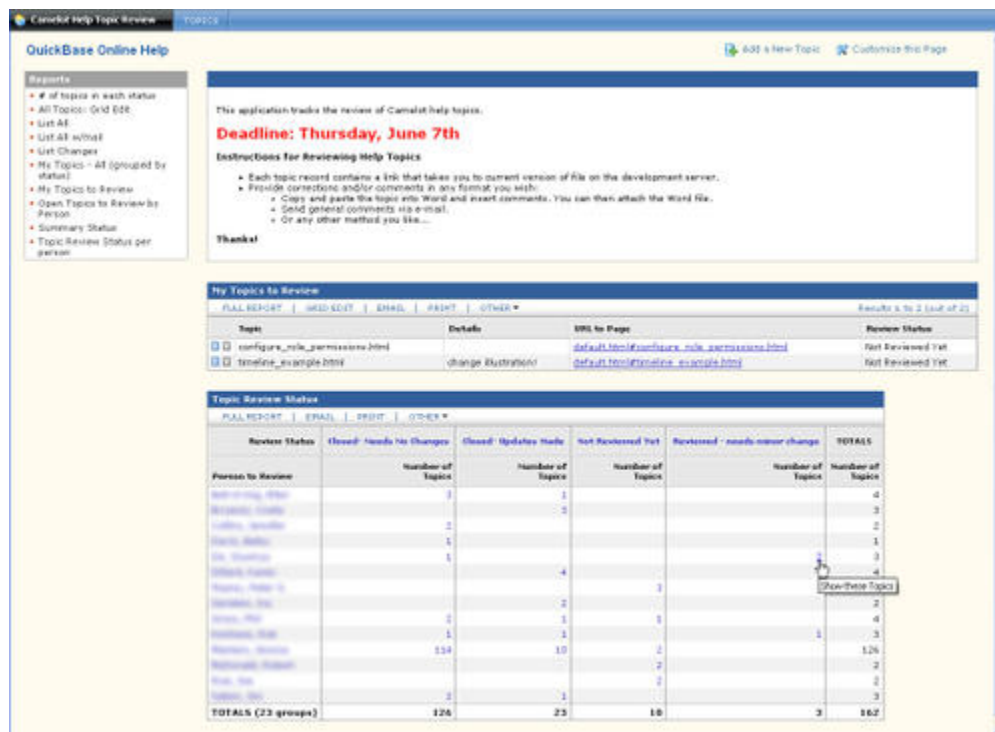
If necessary, you can create multiple dashboards for a single role. For example a sales manager may want one dashboard for pipeline management and another for sales rep management. Once you create each dashboard, [add custom buttons to the top of the dashboard page](#) and users can quickly switch between dashboards.



This dashboard shows the manager how sales reps are performing. Using the circled links, the manager can quickly switch to other dashboards to monitor the sales pipeline or see detailed reports on individual reps.

Show users how their progress compares with others

Finally, I'll show you a dashboard that I designed. This one tracks internal review of help topics. It contains some of the elements you've just read about, like a text section with instructions and a user-customized report that shows the current viewer only those topics he or she must review.



One new wrinkle is the table on the bottom. It shows overall progress--namely how many topics each person has reviewed or not reviewed. (Names are intentionally blurred to protect the innocent.) Not only can my colleagues see if they've fallen behind others, I can see what topics require edits. A single click on a number in the *Reviewed - needs change* column opens a report with all the feedback someone's got for me.

The goal of this dashboard was to guide users, spur action, and speed tasks. I used custom reports and useful shortcuts to make reviewing topics and giving feedback as easy as possible for folks who were, in fact, doing me a favor. Do the same for users of your applications. The time you save may be your own.

Understand what users need

Finally, as Peter emphasized, listen, learn and evolve. Ask your users how they like your application. Stand behind them as they try to use it to do their work. Last week, David Pogue stressed the importance of [Designing What's Right for Consumers](#). Your users are your consumers. Craft your application around them. One of the greatest things about QuickBase is that you can keep improving your application and its dashboards, even after everyone's been using it for a long time.