The Power of Pie Charts in Vision Dashboards

Presented by: Nicole Temple

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Agenda

Agenda

1. Resources
2. WebEx Instructions
3. Presentation: The Power of Pie Charts in Vision Dashboards
4. Questions

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Other resources from Full Sail Partners:

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- **Client Feedback – Don't Wait 'Till It's Too Late!**
  http://bit.ly/1sElgYg
- **Why Are CRMs So Important?**
  http://bit.ly/1CW6L9n
- **Blog | Management of Change Series:**
  http://bit.ly/1Bdq1jm

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- **Full Sail Partners Online Events:**
  http://bit.ly/URI1K0
- **Join The Full Sail Partners' User Group Space on Kona:**
  Search for 'Full Sail Partners User Group' on Kona

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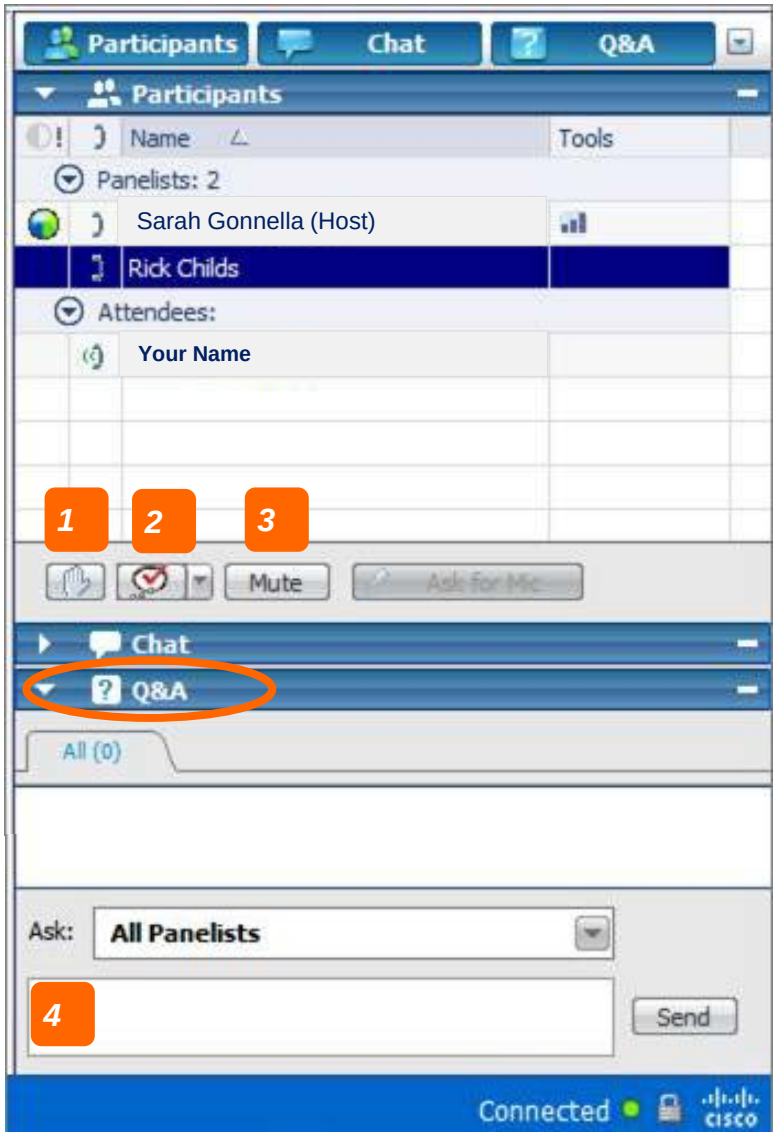
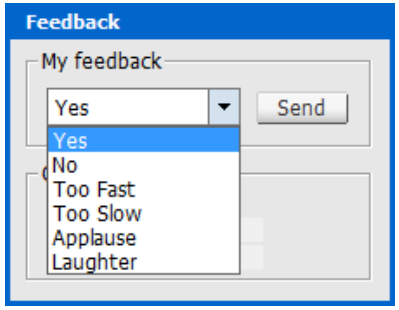
WebEx Instructions



1. ***Raise Hand*** *(be sure to click again to remove raised hand or feedback information)*

2. ***Feedback Tool*** *(use for yes/no questions or to provide the speaker feedback.*



3. ***Mute*** *(mute yourself when you need to talk to someone in your office or put the line on hold)*

4. ***Q&A*** *(Type in the Q&A dialogue box [Not Chat] to ask a question. Be sure to choose All Panelist)*

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The Power of Pie Charts in Vision Dashboards

Presented by: Nicole Temple

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Agenda

- *What is a Dashboard*
- *What Information can be on a Dashboard*
- *Creating Role Based Dashboards*
- *Distributing Dashboard to Users*
- *Overview of Vision Performance Management Module*
- *How Can Dashboards Improve Productivity*

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What is a Dashboard

- *The Dashboard is your portal into your Vision database*
- *The Dashboard is comprised of dashparts*
- *Dashparts allow you to view information from different areas in Vision and bring them together into a single location…your Dashboard*
- *Dashboards can be pre-configured by role and then personalized by user*
- *Dashboard content is controlled by Vision's role-based security*
- *There are three Dashboard options available: Vision, Navigator, VPM*

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Dashboard Functionality

- *Create multiple Dashparts of different or the same type*
- *Create system or web dashparts*
- *Configured by retrieving records from a list or query to find specific records within a dashpart*
- *Select from four options to display your dashparts*
- *Print most of your dashpart information from the Dashboard*
- *Hide, reinstate and delete dashparts*
- *Select the color of your dashparts*
- *Group and filter grid dashparts*
- *Automatically be tiled horizontally or vertically, set to grid format, or dragged to desired location, and resized as needed*

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What information can be on a Dashboard

System Dashparts

- ***Info Center Information*** *- Listing of records and quick access to: Clients, Contacts, Employees, Vendors, Projects, Leads, Marketing Campaigns, Opportunities, Proposals, and Project Plans*
- ***Applications*** *- Single-click access to any application (i.e. timesheet, expense report, transaction center, etc.)*
- ***Reports*** *- Single-click access to preview favorite reports (including access to print options and printing), access to change dates from dashpart*
- ***Activities*** *- Display and manage your activities*
- ***Alerts*** *- View system generated and workflow alerts, with drill down capability*
- ***Links*** *- Quick access to frequently used web sites, email address and documents*
- ***Deltek eSupport Alerts*** *– Quick access to eSupport alerts, knowledge base, support cases, etc.*
- ***Vision Tip of the Day*** *– New tip appears each time you access your Dashboard or click the refresh dashpart*
- ***AR Invoice Review-*** *New dashpart for viewing Paid, Unpaid, and all for clients*

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What information can be on a Dashboard

Web Dashparts

- *HTTP – Display your favorite or frequently accessed web sites in a dash part*
- *FTP – Display frequently used FTP sites in a dash part*
- *Web Outlook and Web Outlook 2007 – Display your Outlook web mail in a dash part*
- *Report – Display Vision favorites reports in a dash part as a report or as a graph*
- *File – Display files in a dash part*

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Creating Role Based Dashboards

Typical Role Based Dashboards

- *Executive/Principal – views company-wide financial, project, employee and marketing information*
- *Project Manager – views project budgeting, billing and receivables information*
- *Marketing – views company-wide marketing, project and employee information*
- *Finance – views all levels of financial, project, and employee information*
- *Time & Expense – quick access to time/expense and limited reporting and info center information*

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Pushing the Dashboard out to users

- Pushing the dashboard out to users will override anything they have on the dashboard currently
- A fictitious user can be created to hold the different role based dashboards for pushing out to new users
- Only those with access in their role can push out to other users
- Only favorite reports can be pushed to the dashboard
- Employees will only see reports that they have access to through their role as a standard report and have been given access to the favorite
- Employees can still generate new dasparts (web or system) as provided access through their role, remove dashparts provided, and configure the dashparts.

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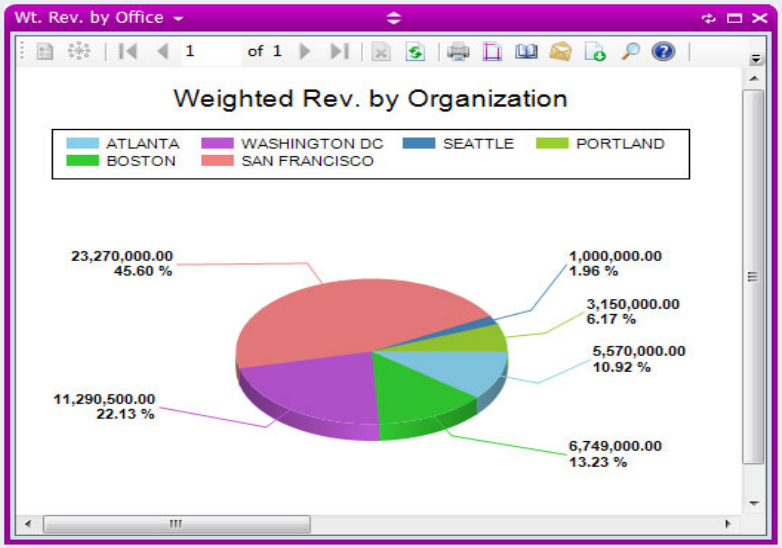
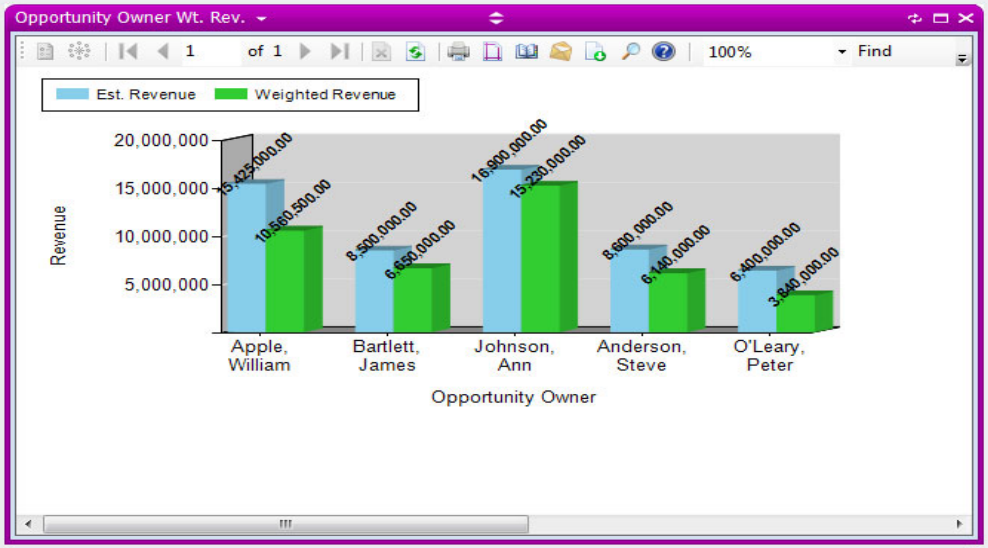
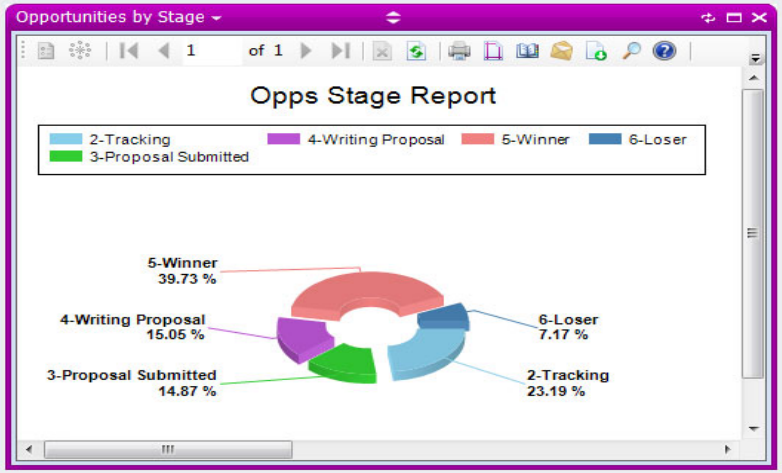
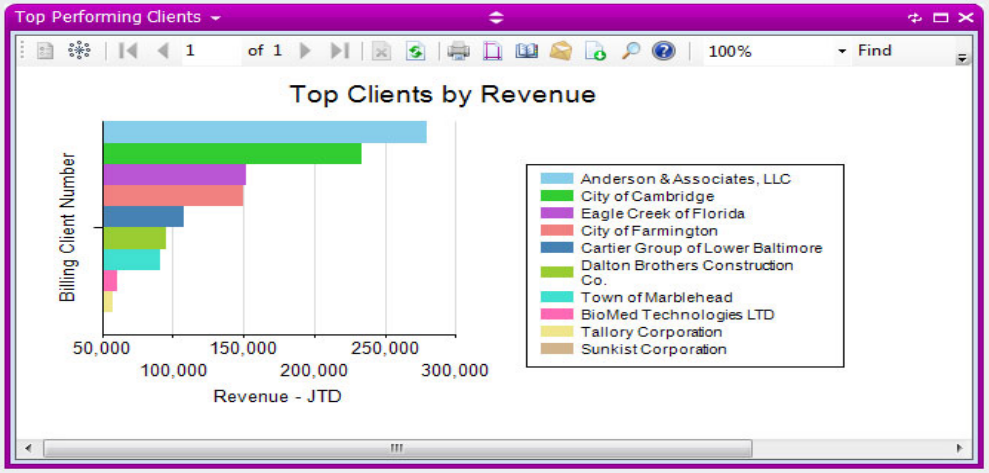
Some Common Graphing Examples









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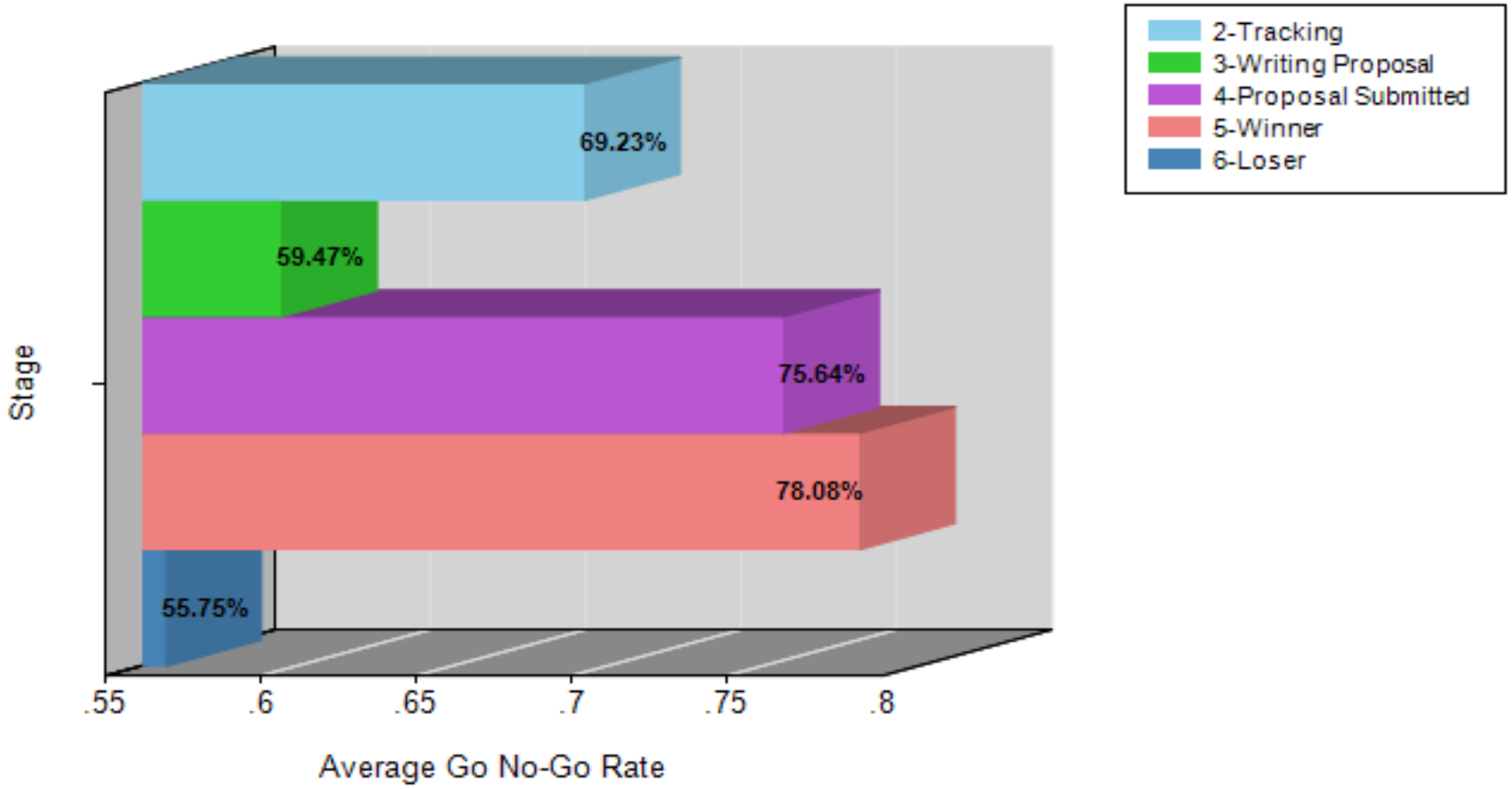

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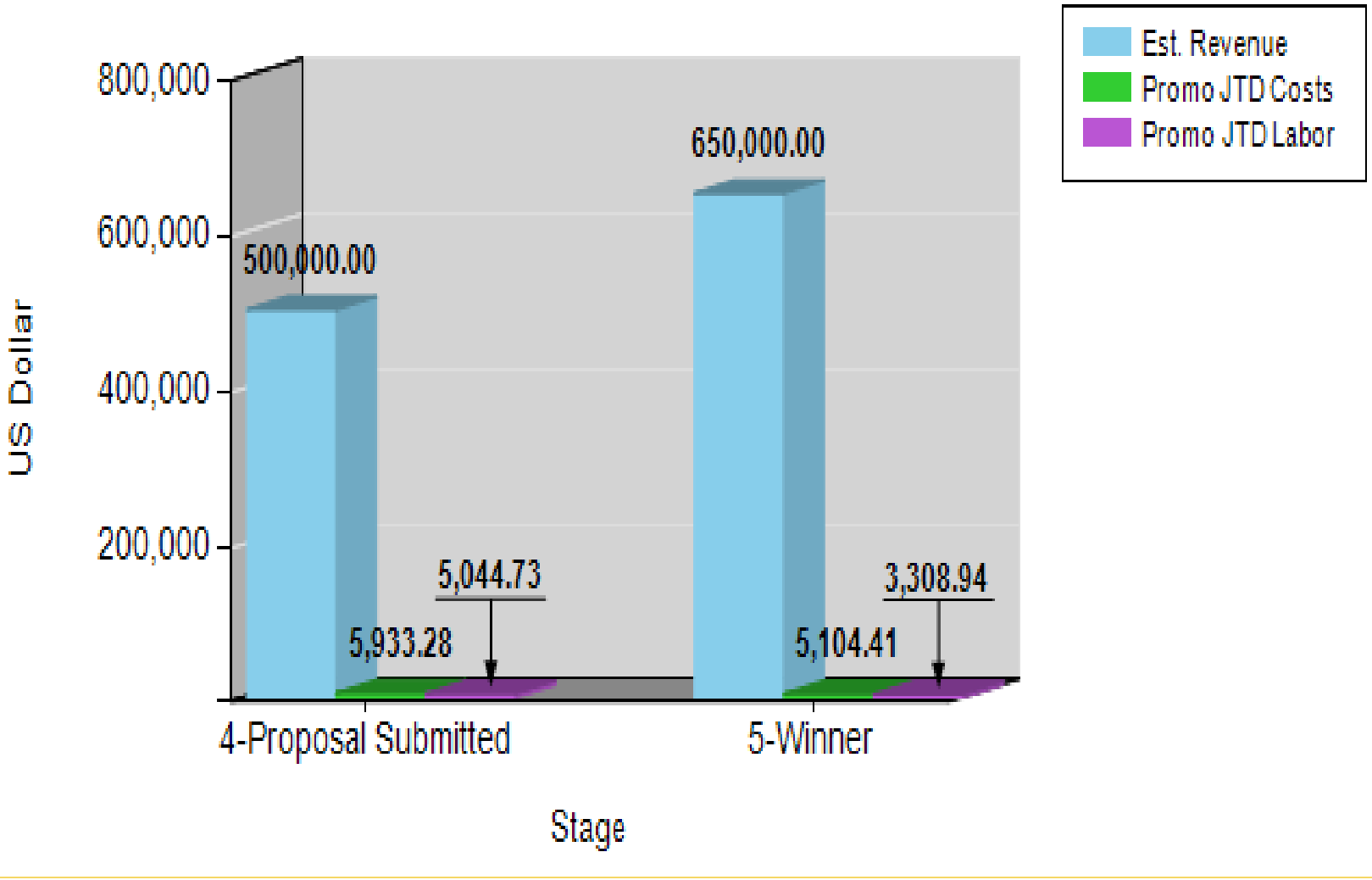

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Role Based Examples

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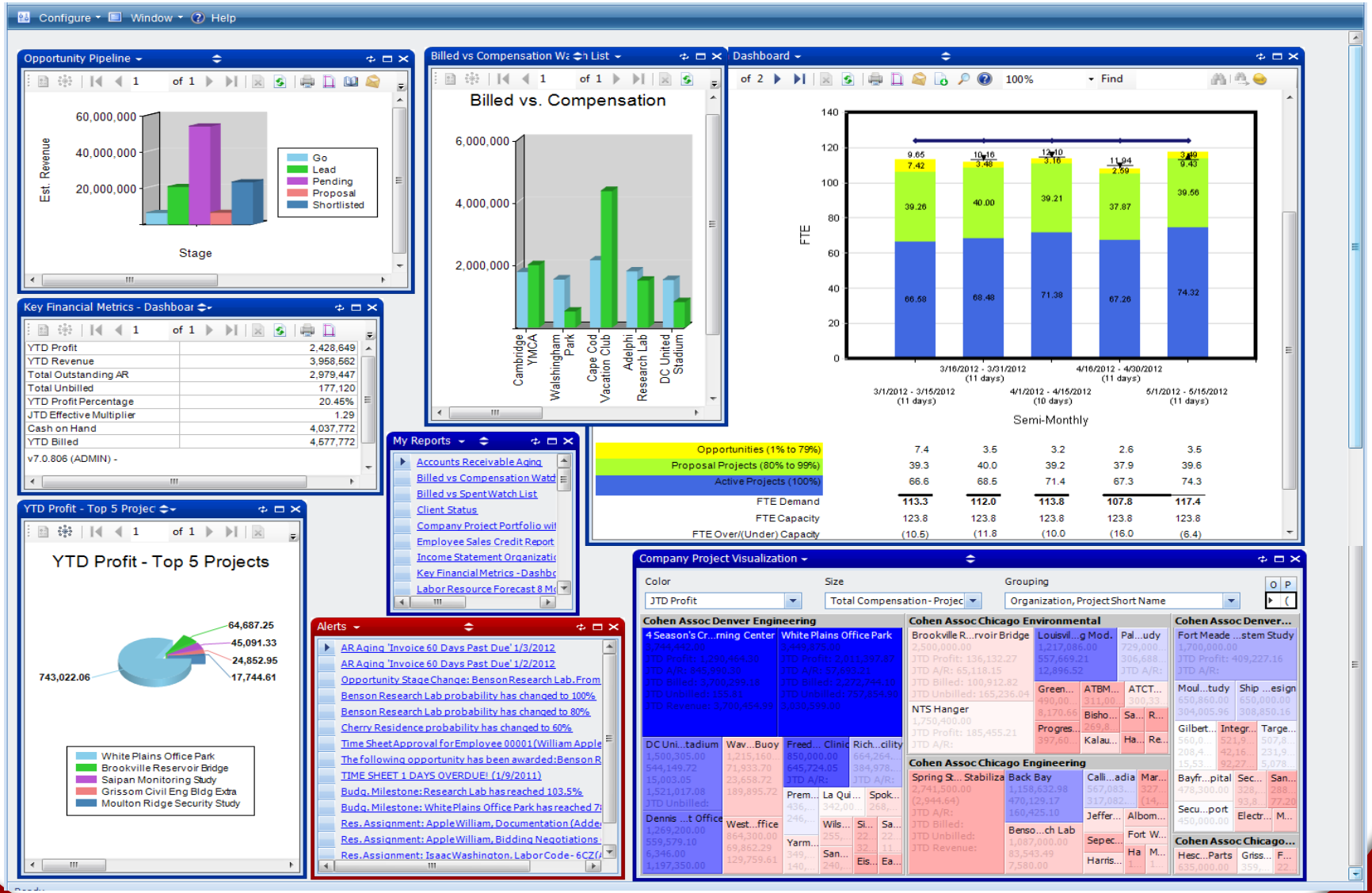
Dashboard - Executive



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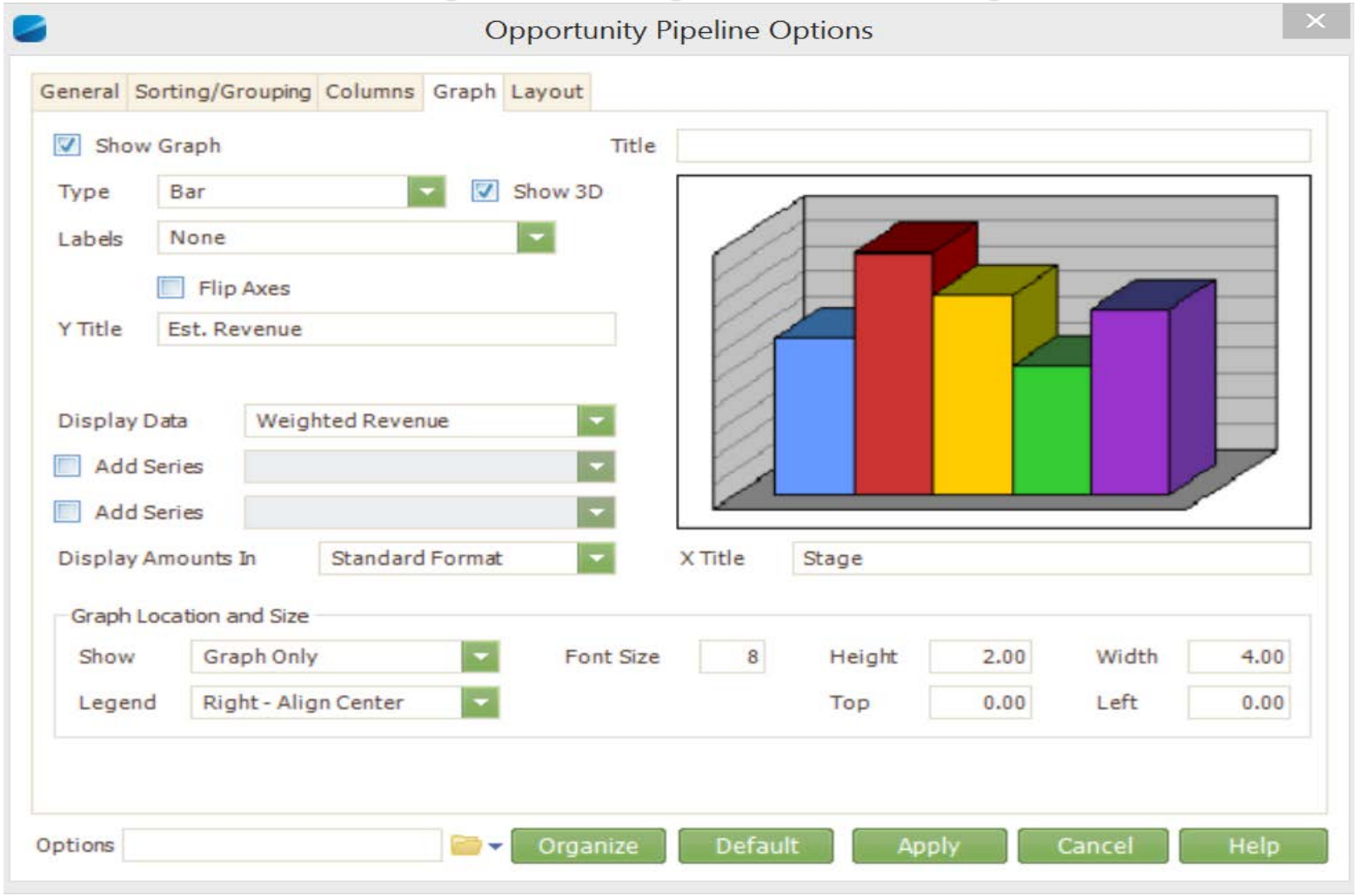
Graphing Tab - Opportunity Pipeline Dashpart Report Example



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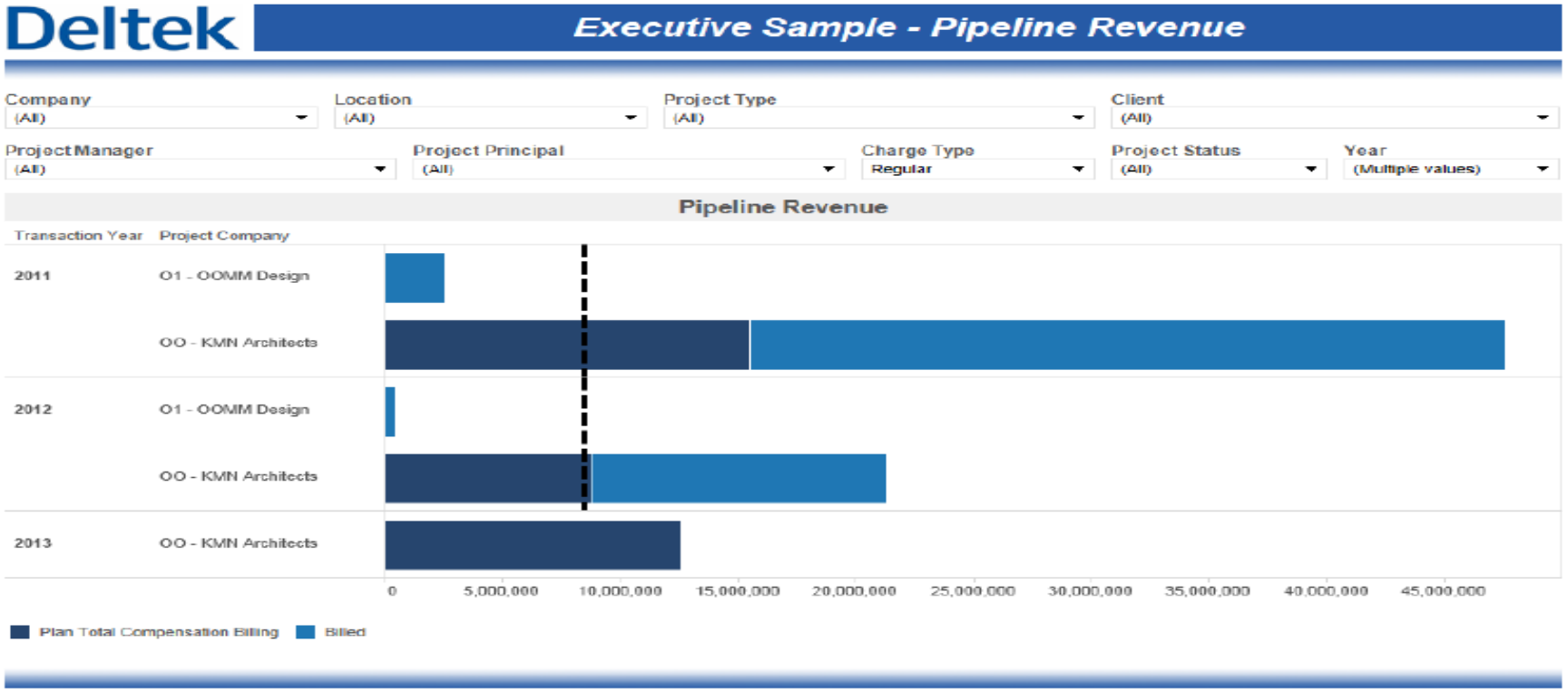
Dashboard - Executive cont…

Executive Sample – Pipeline Revenue

The **Pipeline Revenue** sample dashboard contains a single chart that visualizes a combination of planned billing and actual billing intended to represent the total billings that will be achieved within a specific time period. The default KPI for revenue is included as well. This chart is broken down by top level organization and is automatically filtered to show the most recent 3 years.



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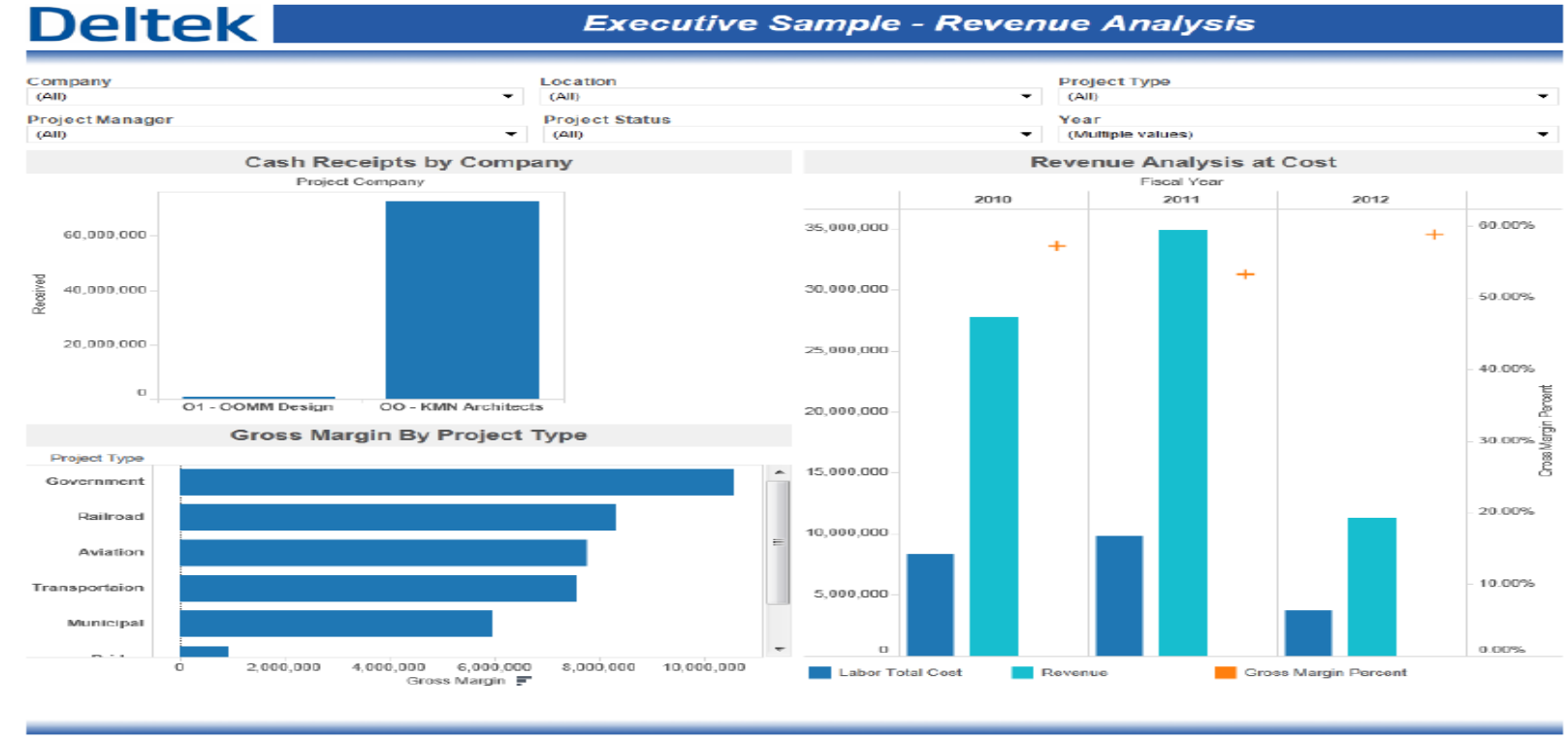
Dashboard – Executive cont…

Executive Sample – Revenue Analysis

The **Revenue Analysis** sample dashboard contains 3 charts intended to provide a quick visualization of revenue status throughout the organization. The *Cash Receipts by Company* chart shows received amounts by top level organization and can be drilled down into the organization structure. *Gross Margin by Project Type* breaks down gross margin amounts broken down by project type. *Revenue Analysis at Cost* compares Labor Total Cost, Revenue and Gross Margin Percent by year and allows for drilldown into fiscal periods. This dashboard is automatically filtered to show the most recent 3 years.



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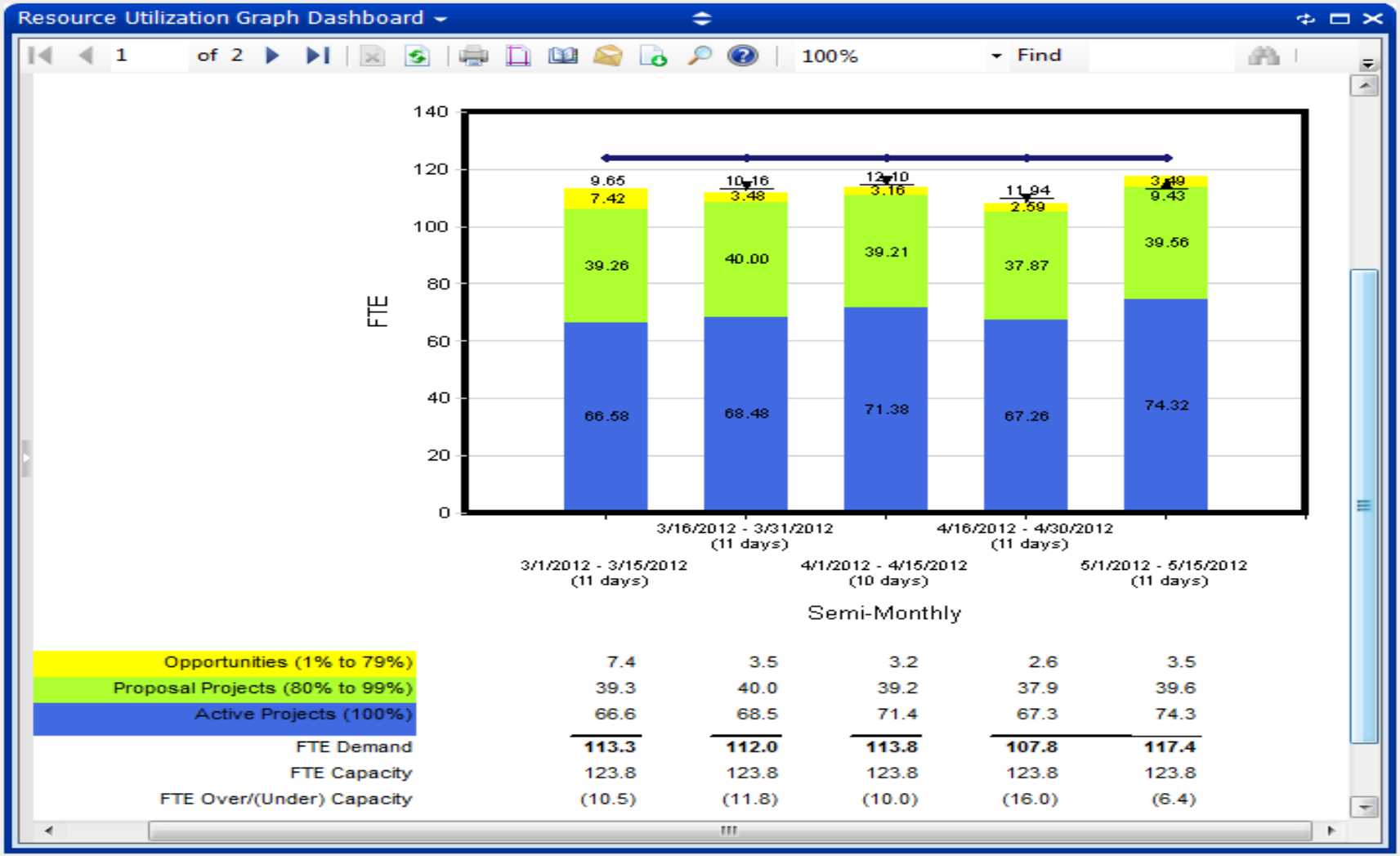
Dashboard – Executive cont…



Opportunities (1% to 79%)	7.4	3.5	3.2	2.6	3.5
Proposal Projects (80% to 99%)	39.3	40.0	39.2	37.9	39.6
Active Projects (100%)	66.6	68.5	71.4	67.3	74.3
FTE Demand	**113.3**	**112.0**	**113.8**	**107.8**	**117.4**
FTE Capacity	123.8	123.8	123.8	123.8	123.8
FTE Over/(Under) Capacity	(10.5)	(11.8)	(10.0)	(16.0)	(6.4)

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Dashboard – Executive cont…

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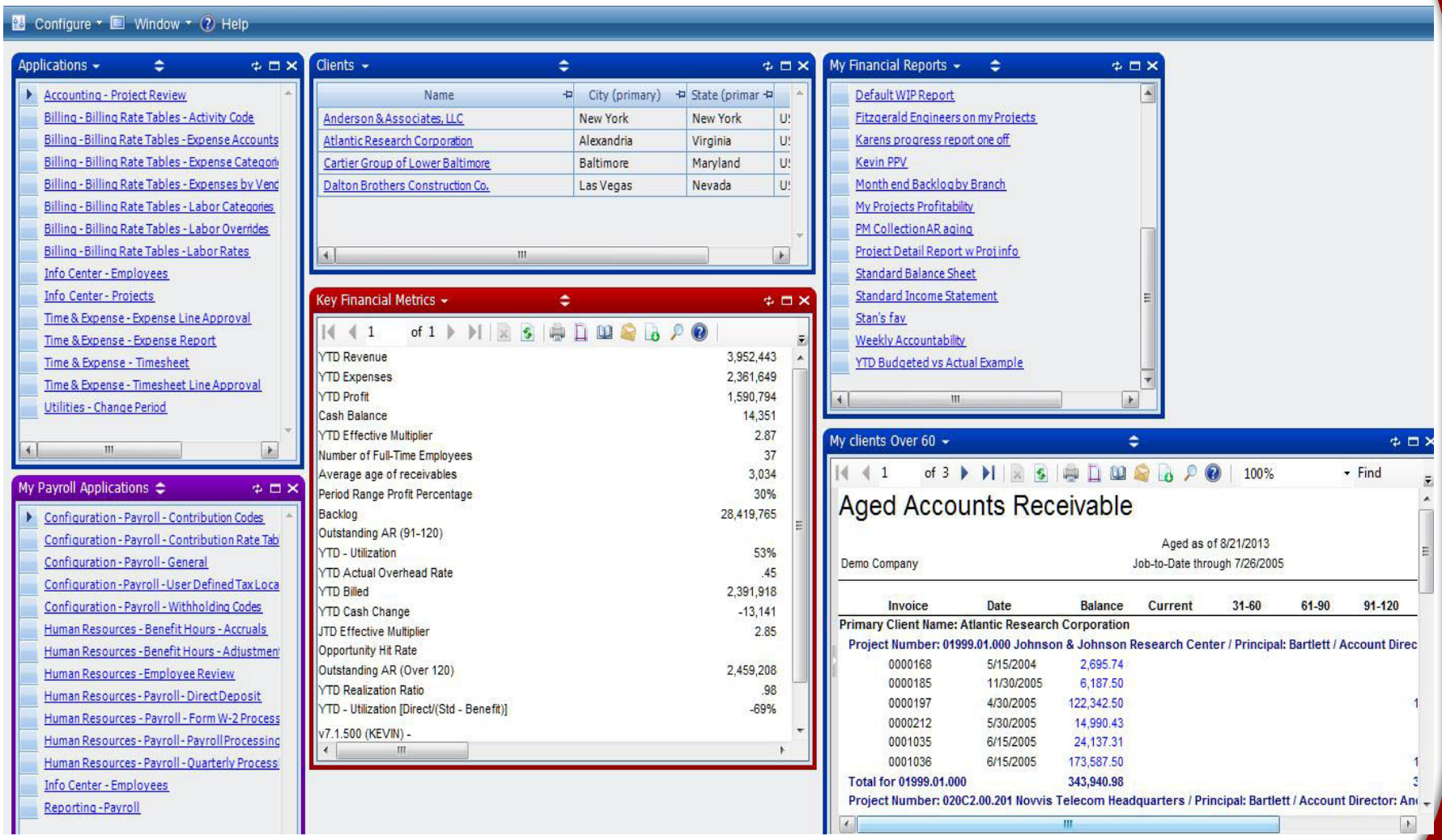
Dashboard - Finance



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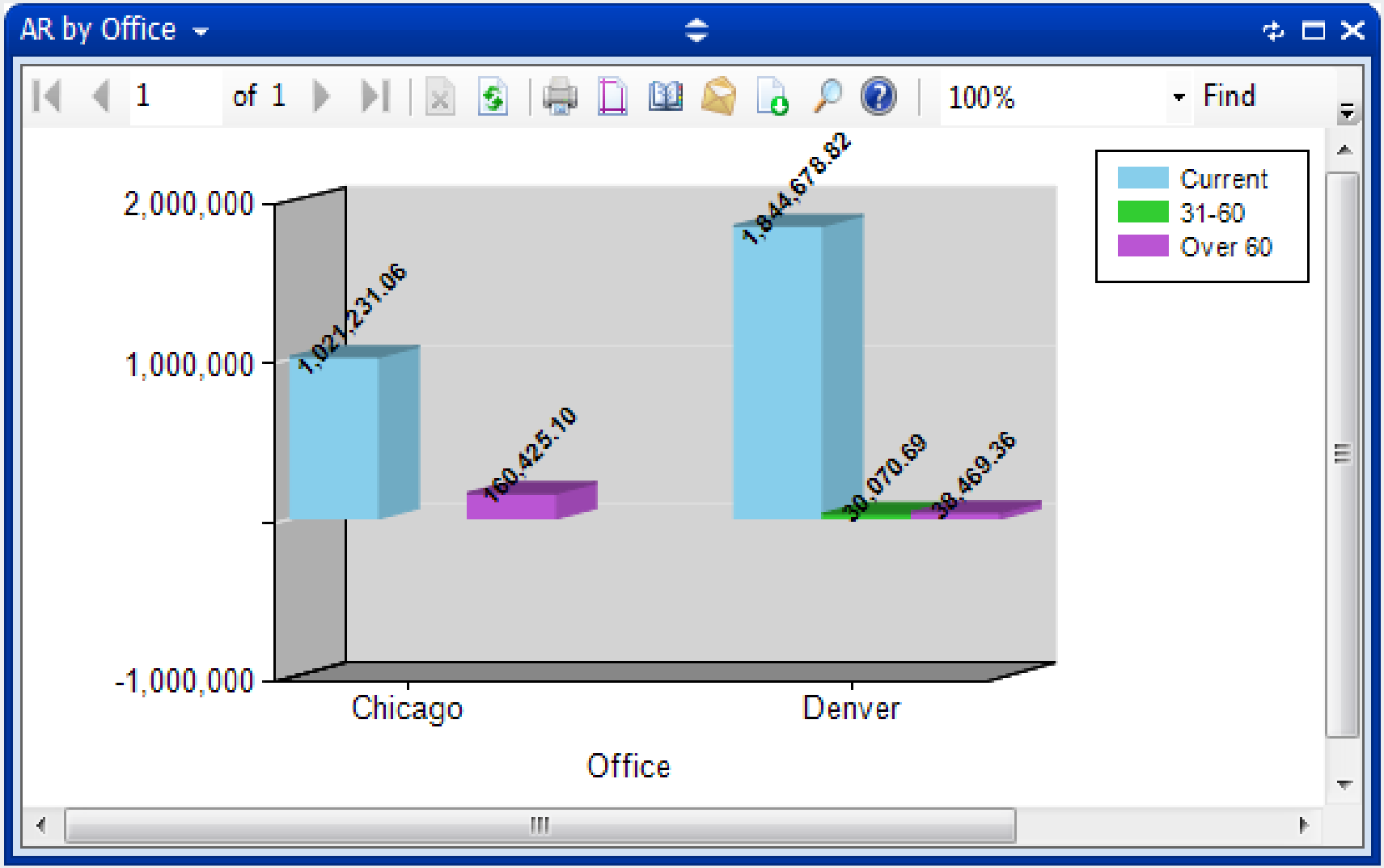
Dashboard - Finance



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Dashboard - Finance

Finance Balanace Sheet Charts

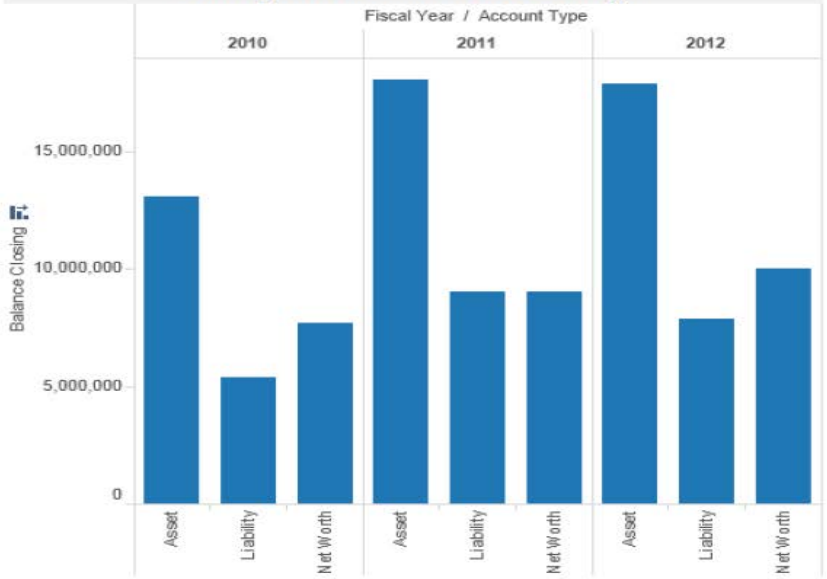
Deltek

Finance Sample - Balance Sheet Charts

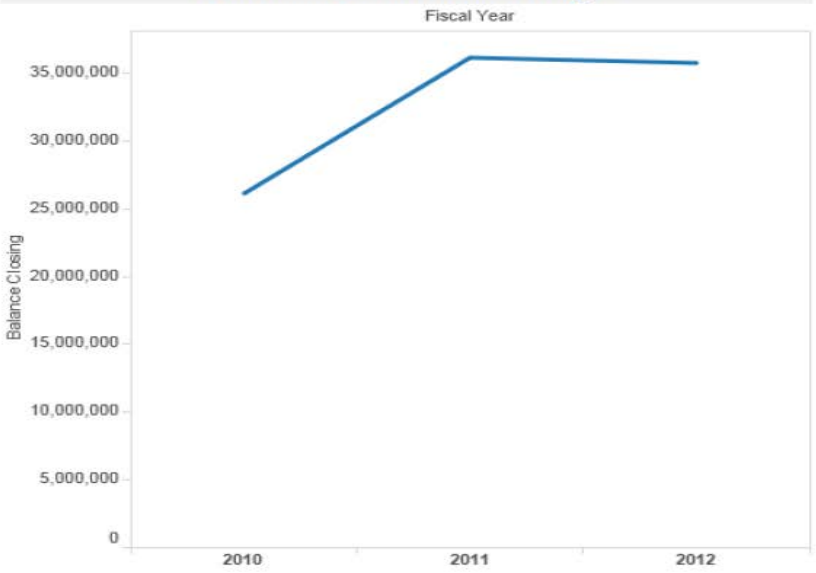
Balance Sheet Account Type: (All)

Year: (Multiple values)

Total by Balance Sheet Account Type



Total Blance Sheet Account Type



Balance Sheet Account Type Table

Account Type	Fiscal Year 2010	2011	2012
Asset	13,064,914	18,076,612	17,882,262
Liability	5,381,033	9,043,264	7,885,152
Net Worth	7,683,881	9,033,349	9,997,110

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Dashboard - Finance

Finance Income Charts

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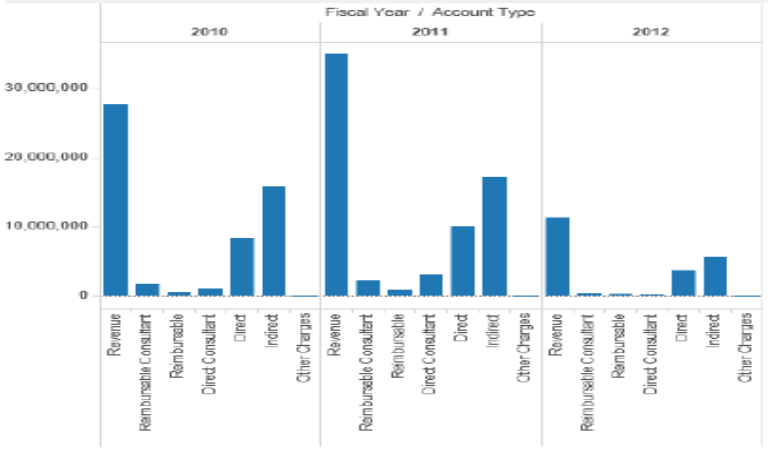
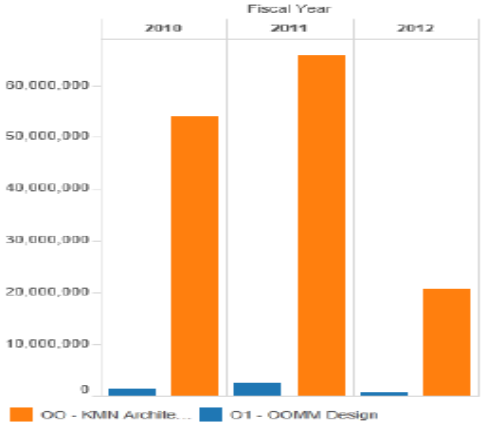
Finance Sample - Income Charts

Company: (All) | Location: (All) | Income Account Type: (All) | Year: (Multiple values)

Total by Income Account Type



Total Income Account Type by Company



Income Account Type Table

Account Type	Company	Fiscal Year 2010	2011	2012
Revenue	O1 - OOMM Design	988,925	1,752,475	515,867
	OO - KMN Architects	26,768,294	33,102,523	10,762,409
Reimbursable Consultant	O1 - OOMM Design	40,599	92,366	31,285
	OO - KMN Architects	1,711,327	2,152,083	435,234
Reimbursable	O1 - OOMM Design	5,522	16,262	22,619
	OO - KMN Architects	609,597	832,419	262,705
Direct Consultant	O1 - OOMM Design	1,122	0	
	OO - KMN Architects	1,086,921	3,177,930	201,942
Direct	O1 - OOMM Design	295,449	549,958	146,351
	OO - KMN Architects	8,137,327	9,470,082	3,549,833
Indirect	O1 - OOMM Design	102,894	233,193	86,819
	OO - KMN Architects	15,722,793	16,962,224	5,600,409
Other Charges	O1 - OOMM Design	69		
	OO - KMN Architects	-42,414	6,235	-2,883

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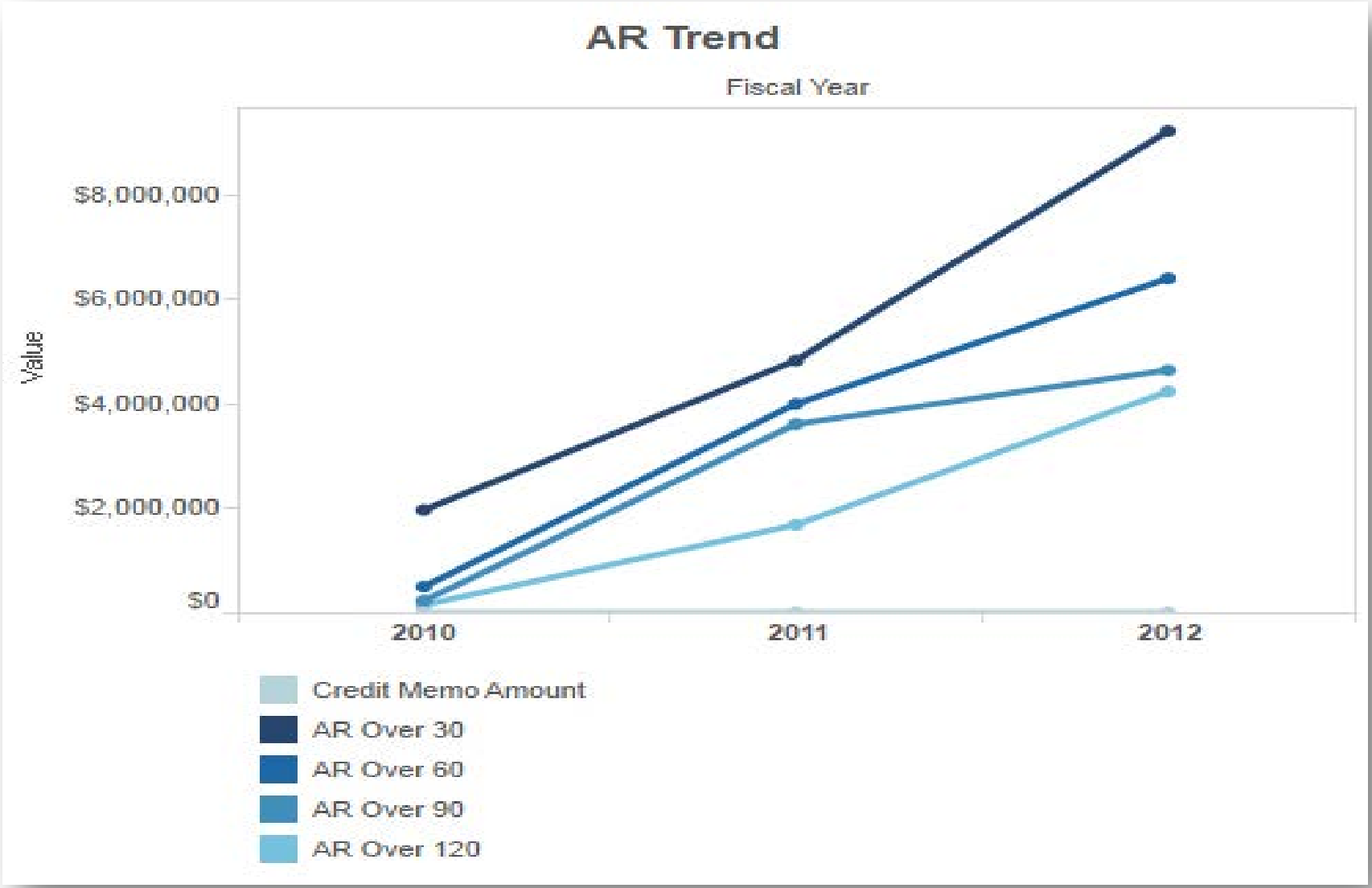
Dashboard - Finance



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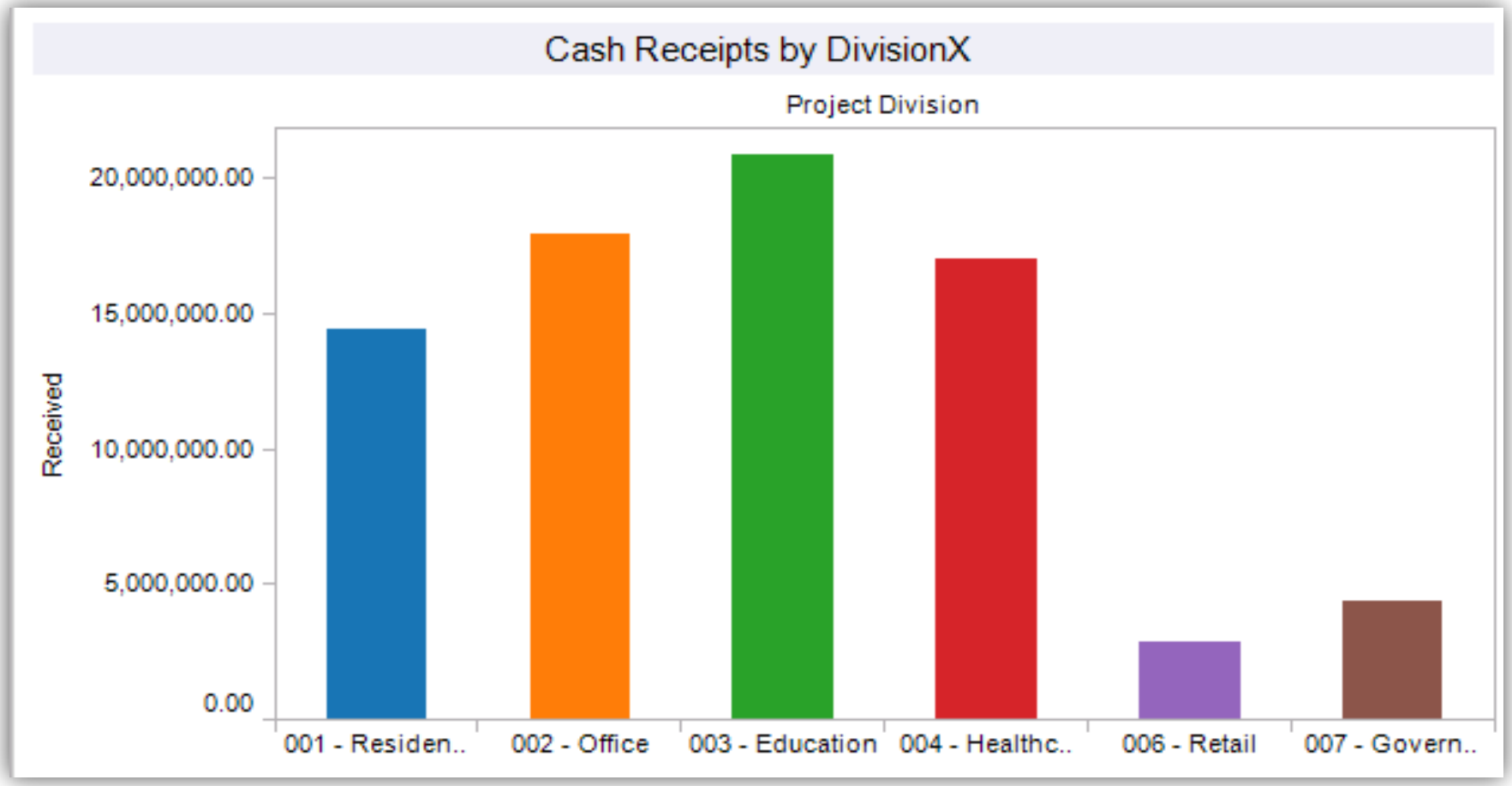
Dashboard - Finance



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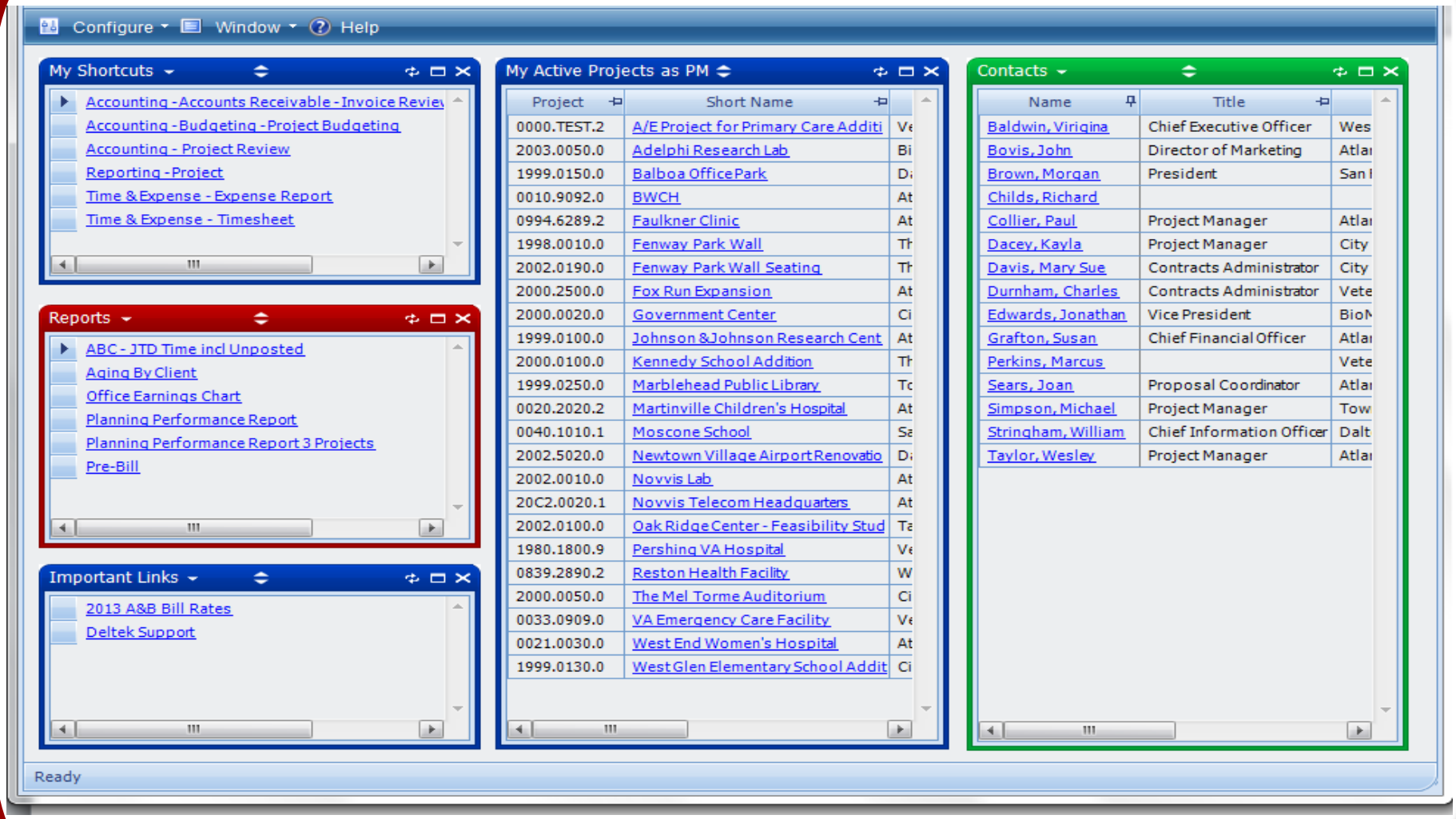
Dashboard – Project Management



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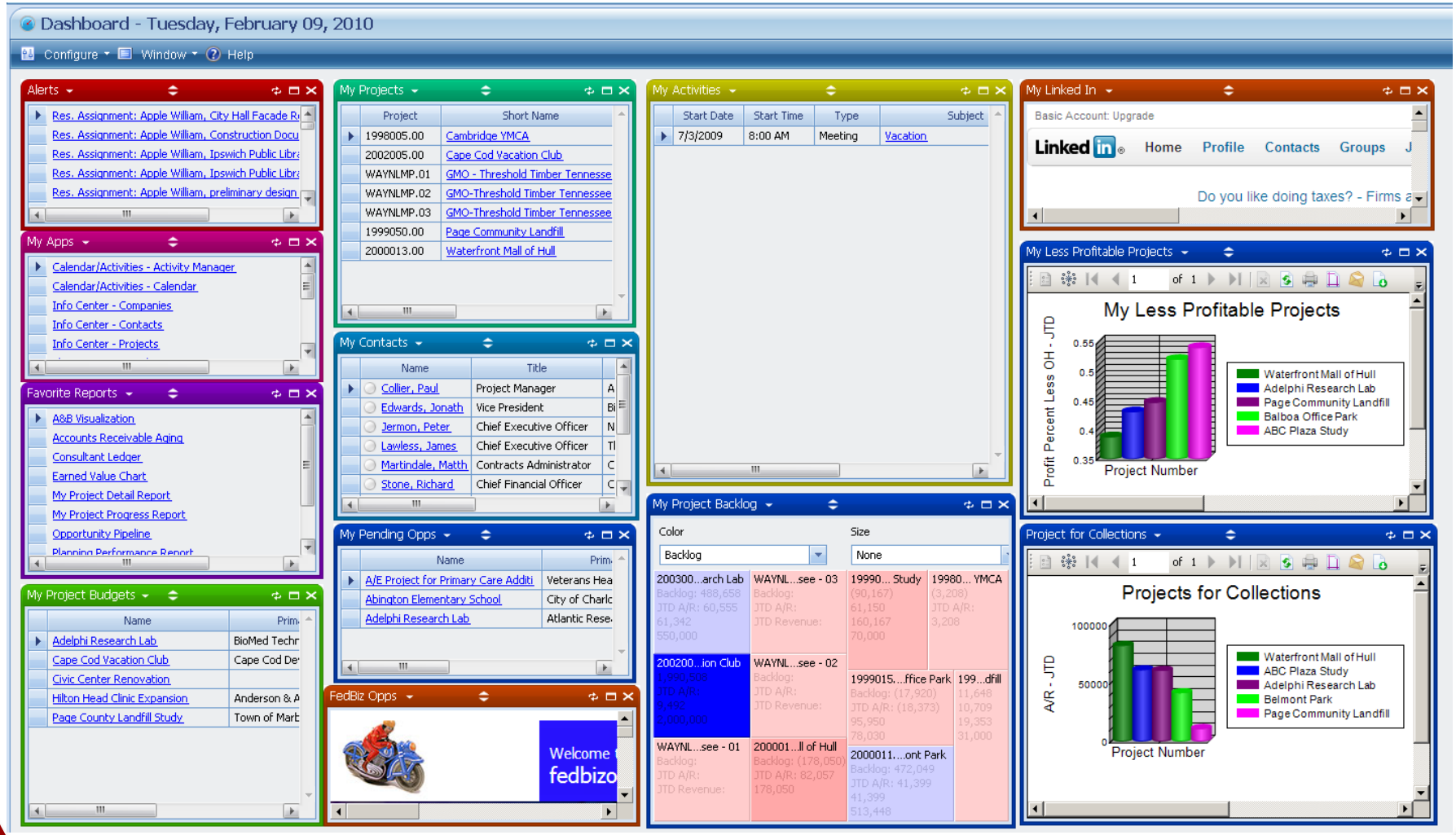
Dashboard – Project Management



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Dashboard – Project Management

Project Manager Sample – Project Status

The **Project Status** sample dashboard includes a single table that shows key project financial metrics. The table is initially broken down by project but can be drilled down to the phase and task levels.

Deltek

Project Manager Sample - Project Status

Project Type	Project Primary Client	Charge Type	Project Status
(All)	(All)	Regular	(All)

Project Budget

Project Number - Short Name	Baseline Labor Billing	Labor Total Billing	EAC Labor Billing	Total Baseline - EAC Labor Billing	EAC Multiplier Billing	AR Over 60
[redacted]				190,465,140		
[redacted]				190,465,140		
[redacted]		0		190,465,140		
[redacted]		41,654	41,654	190,423,486	7,306.15	
[redacted]		11,139	11,139	190,454,001	27,321.59	
[redacted]		30,163	30,163	190,434,977	10,089.40	
[redacted]		60,557	60,557	190,404,583	5,025.55	
[redacted]		10,183	10,183	190,454,957	29,687.19	
[redacted]		64,069	64,069	190,401,071	4,750.11	
[redacted]	11,457	3,501	3,501	190,461,639	86,929.68	
[redacted]	122,095	226,607	226,607	190,238,533	1,342.90	
[redacted]	108,249	96,861	96,861	190,368,279	3,141.93	
[redacted]	109,960	102,984	102,984	190,362,156	2,955.11	
[redacted]				190,465,140		
[redacted]		46,965	46,965	190,418,175	6,479.92	
[redacted]				190,465,140		
[redacted]	5,833	4,239	4,239	190,460,901	71,792.89	
[redacted]		5,022	5,022	190,460,118	60,595.37	
[redacted]	0	93,688	93,688	190,371,452	3,248.26	

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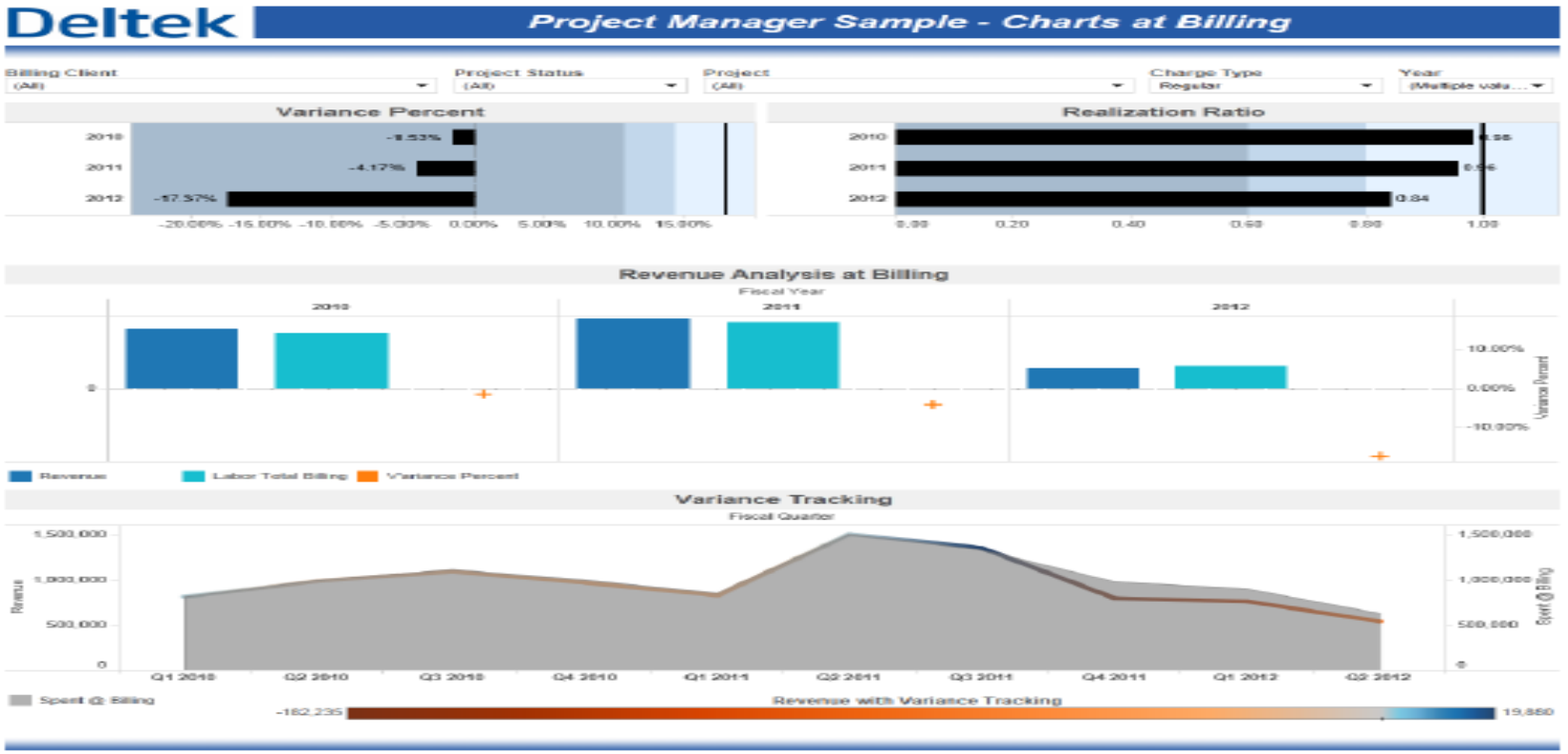
Dashboard – Project Management

Project Manager Sample – Charts at Billing

The **Charts at Billing** sample dashboard contains 4 charts that are intended to visualize the status and trends of key metrics. Two bullet charts show Variance Percent and Realization Ratio values and compare them against the default KPIs. The *Revenue Analysis at Billing* compares Labor Total Billing, Revenue and Variance Percent by year and allows for drilldown into fiscal periods. The Variance Tracking chart compares Revenue and Spent at Billing and plots the variance between blue (positive) and orange (negative). This dashboard is automatically filtered to show the most recent 3 years.



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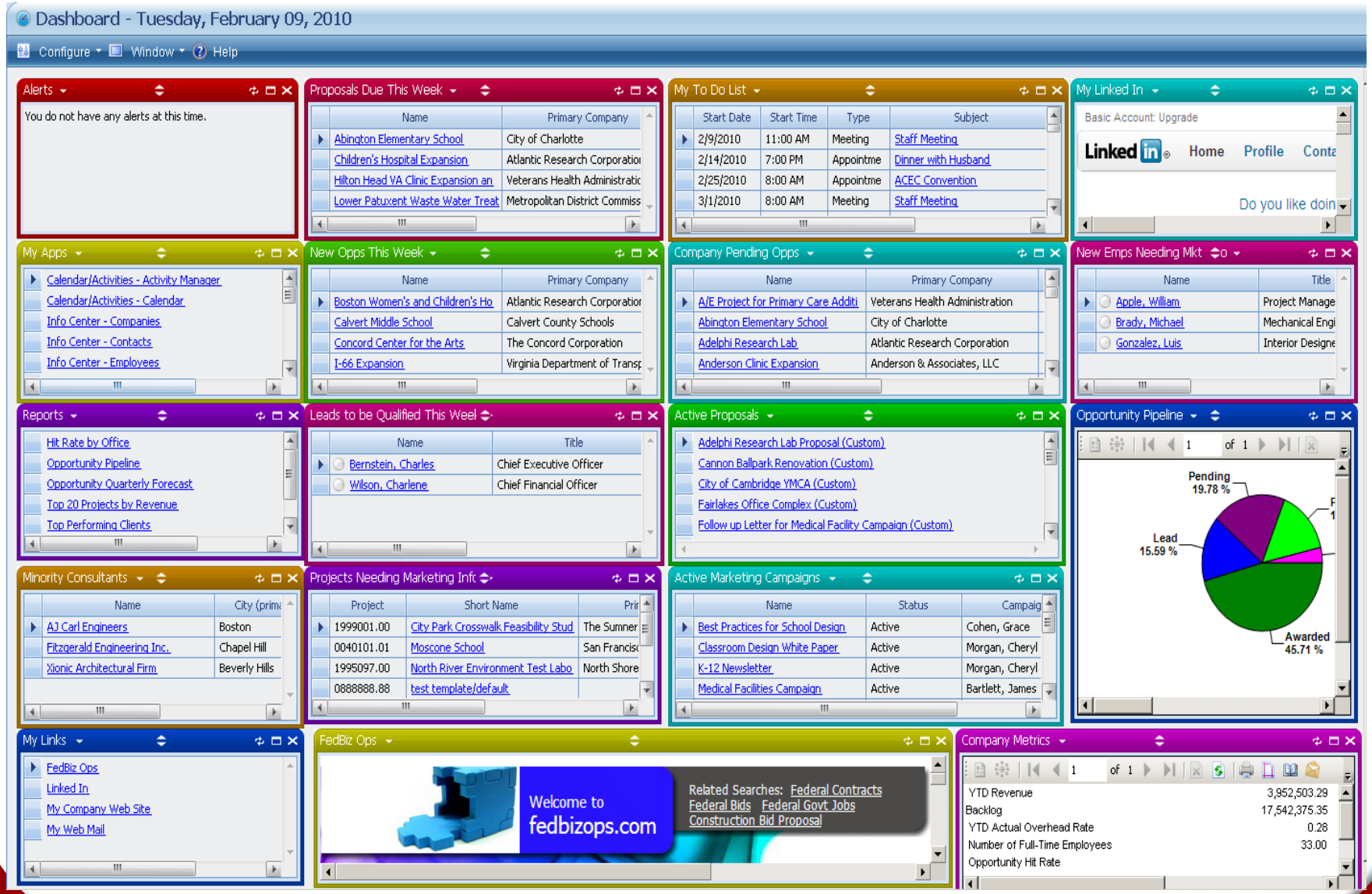
Dashboard - Marketing



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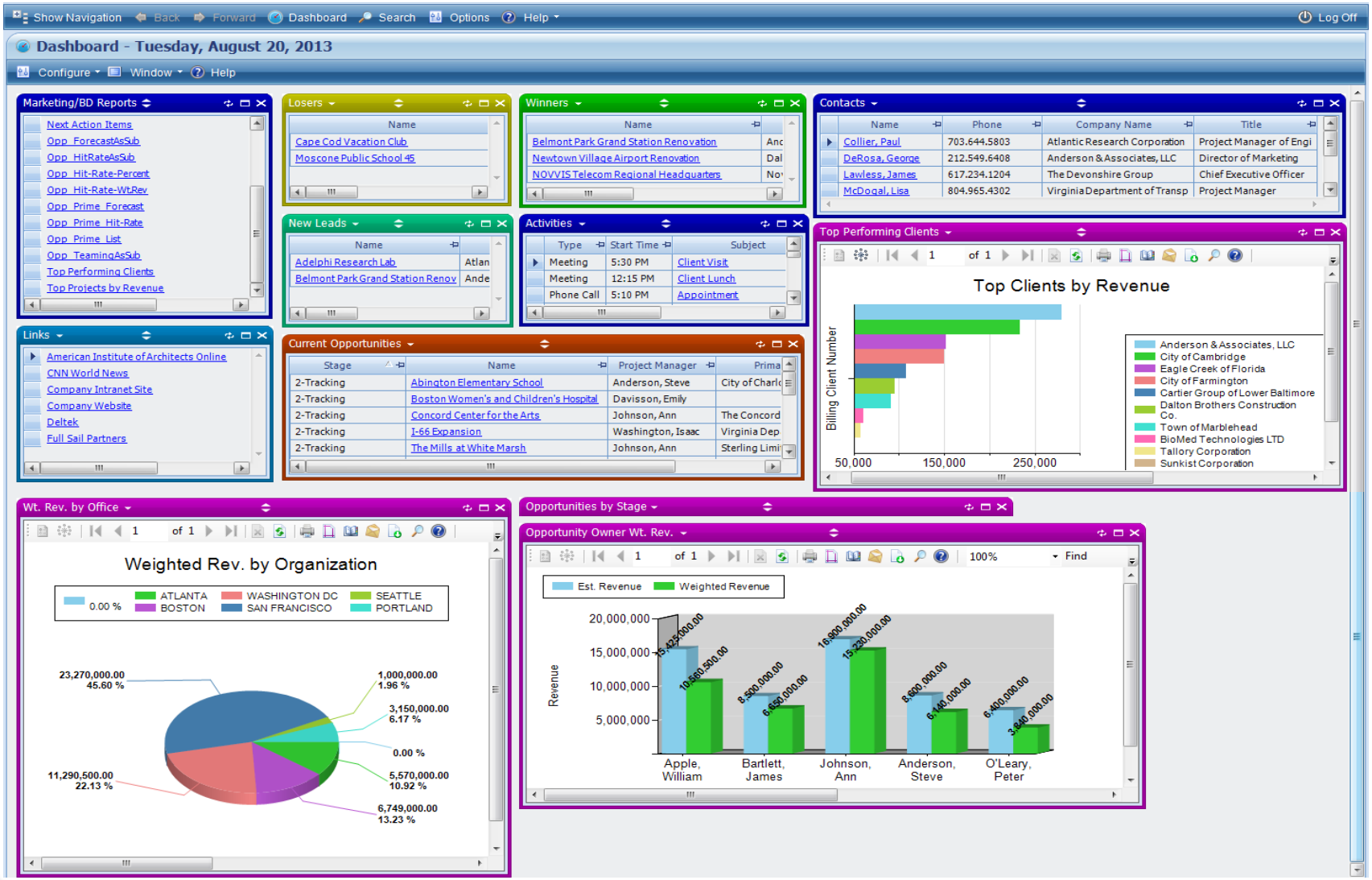
Dashboard - Marketing



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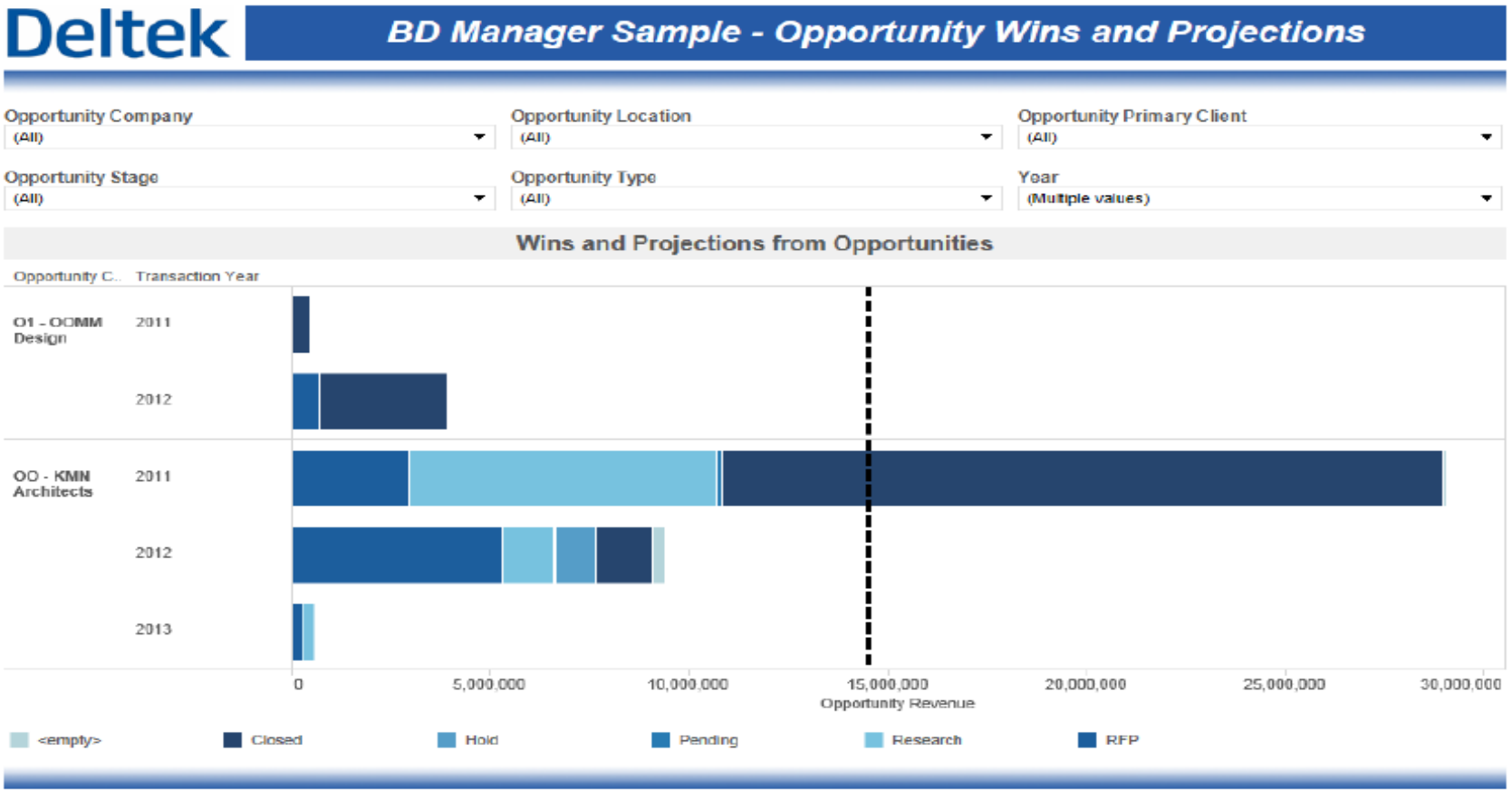
Dashboard - Marketing

BD Manager Sample – Opportunity Wins and Projections

The **Opportunity Wins and Projections** dashboard contains a single chart that visualizes the revenue for active opportunities broken down by stage. The default KPI for target opportunity revenue is also included. This chart is automatically filtered to show the most recent 3 years.



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Dashboard - Marketing

BD Manager Sample – Pipeline Revenue

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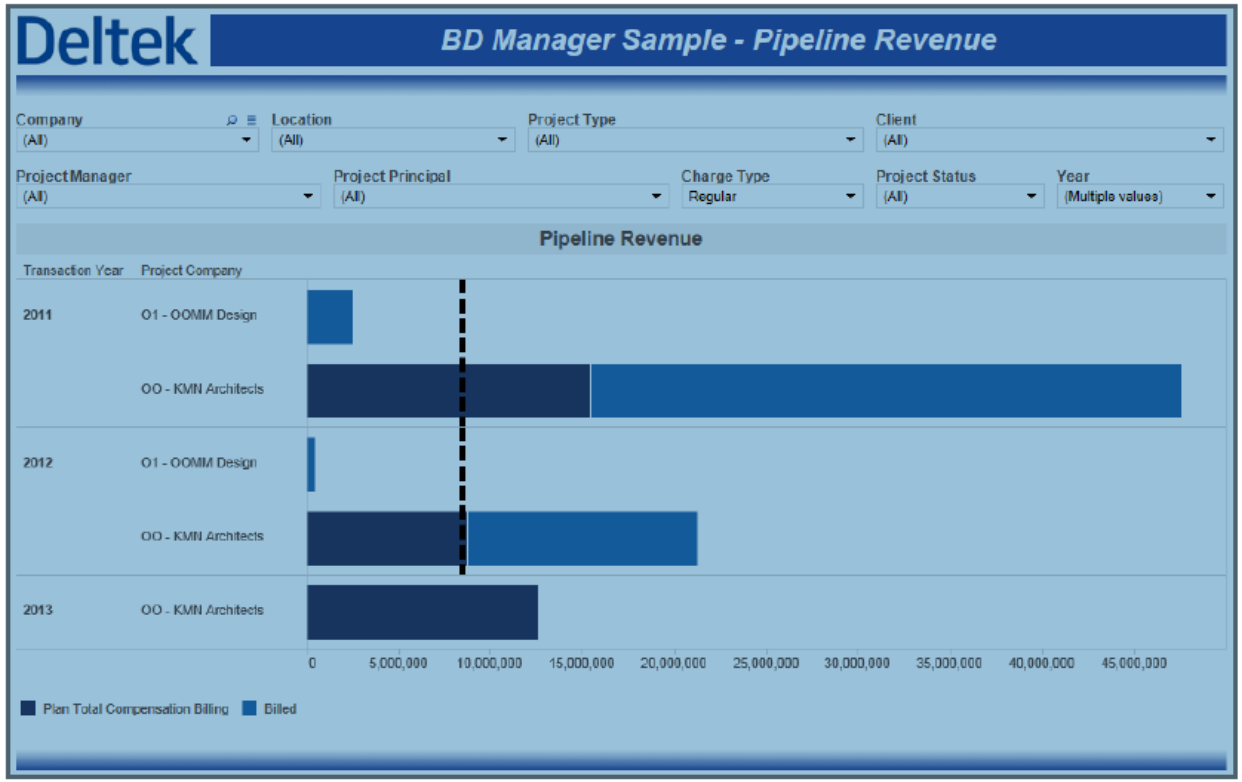

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Distributing Dashboard to Users

- Create a fictitious user for each role
- Create your dashboard for each role
- Temporarily give the role administrative rights. Log in as the users that is linked to the role that you want to copy the dashboard for
- From the Dashboard select Configure → Save Dashboard for Users
- Make sure you check the box to copy personal web Dashparts
- Select the user(s) and click on the Add button
- Click Apply
- Remove the administrative rights from the role
- Create a fictitious user for each role
- Create your dashboard for each role
- Temporarily give the role administrative rights. Log in as the users that is linked to the role that you want to copy the dashboard for
- From the Dashboard select Configure → Save Dashboard for Users
- Make sure you check the box to copy personal web Dashparts
- Select the user(s) and click on the Add button
- Click Apply
- Remove the administrative rights from the role

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How Dashboards Improve Productivity

- Save time by having critical information on your Dashboard, a click away
- Don’t let information/tasks slip through the cracks, use the Dashparts to display information that needs attention
- Use the Dashboard to navigate through the system
- Use Dashparts to highlight opportunities/project/client that may need attention
- Consider developing workflows to automate, enhance and send additional alerts via email
- Access areas outside of Vision directly through Vision

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Vision Performance Management (VPM)

- Timely Access to Critical Business Information
- Identify and Analyze Business Trends by Geography, Markets, Disciplines and more
- Visual Representation of Key Indicators at Company and Project Levels
- Point and Click Functionality
- Side-by-Side Comparisons
- Interactive Drill Down to Transaction Level Detail
- 42 Pre-Configured Role Based Dashboards
- Dashboard Designer Tool to Create Custom Performance Dashboards

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Questions?

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