

The Power of Pie Charts in Vision Dashboards

Presented by: Nicole Temple



Agenda

Agenda

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

Keep your business
on *course*.

Full Sail Partners



Other resources from Full Sail Partners:

Whitepapers & Publications

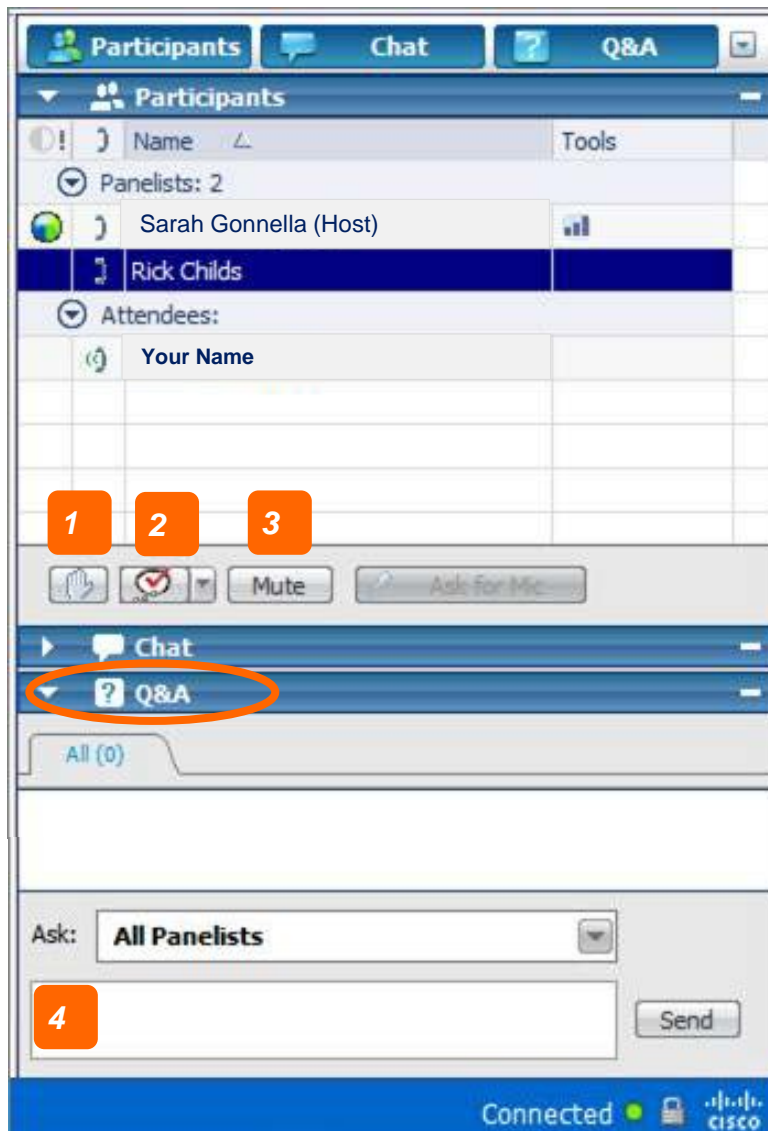
- **Client Feedback – Don't Wait 'Till It's Too Late!**
<http://bit.ly/1sElgYg>
- **Why Are CRMs So Important?**
<http://bit.ly/1CW6L9n>
- **Blog | Management of Change Series:**
<http://bit.ly/1Bdq1jm>

Events, Webinars and Resources

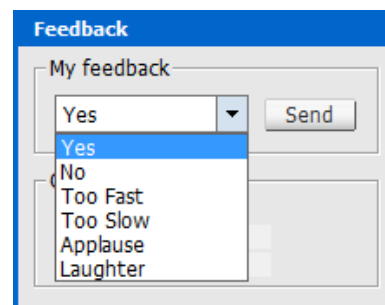
- **Full Sail Partners Online Events:**
<http://bit.ly/URI1K0>
- **Join The Full Sail Partners' User Group Space on Kona:**
Search for 'Full Sail Partners User Group' on Kona



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)



The Power of Pie Charts in Vision Dashboards

Presented by: Nicole Temple



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*



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*



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*



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



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*



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*

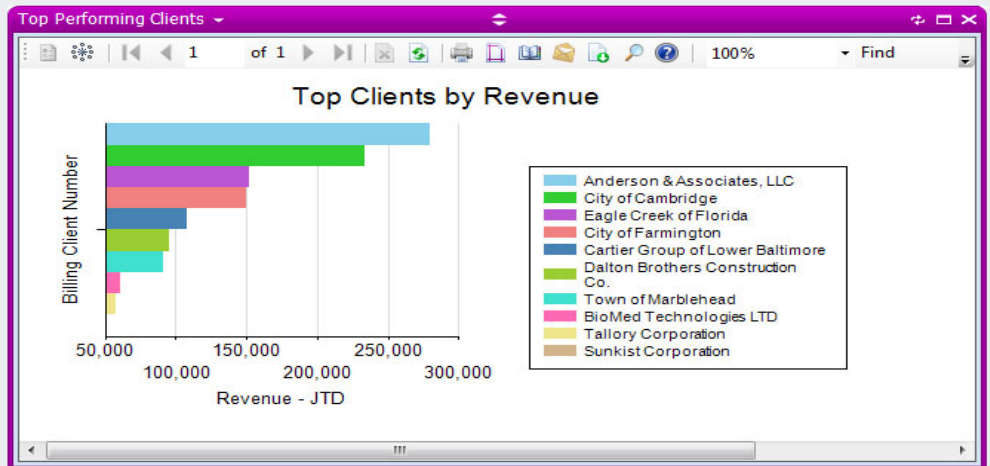
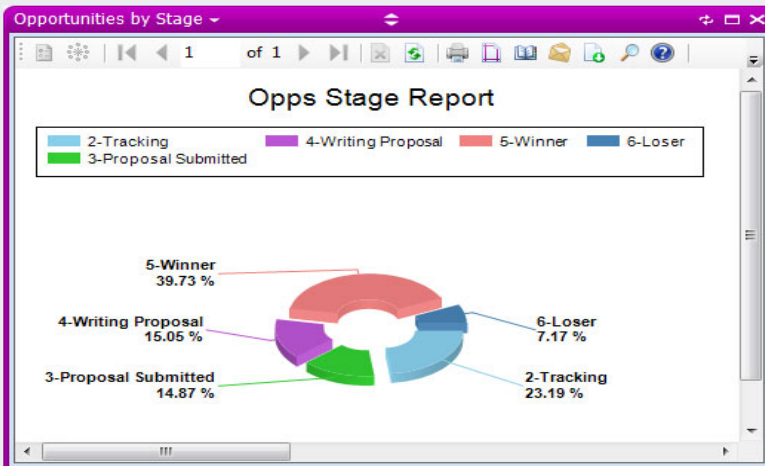
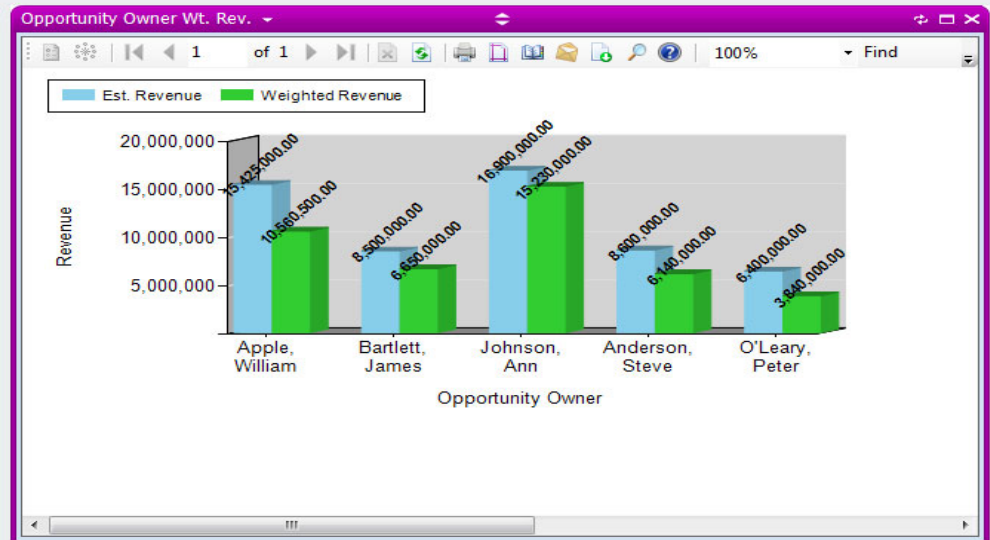
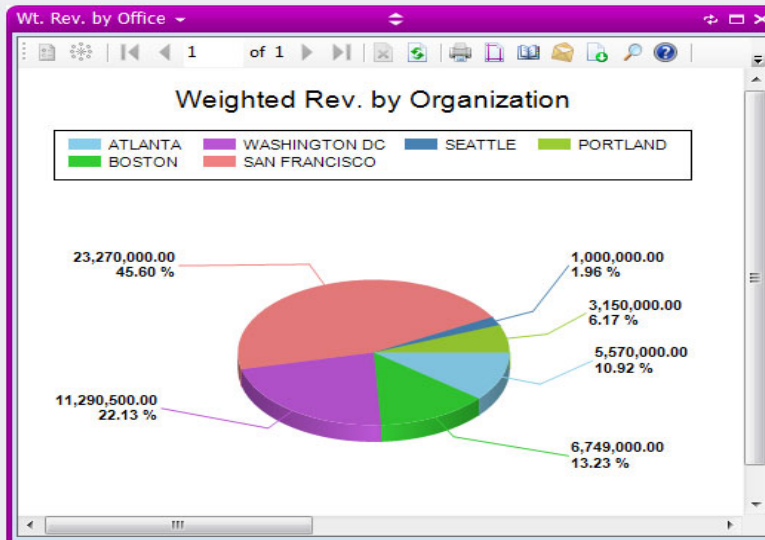


Pushing the Dashboard out to users

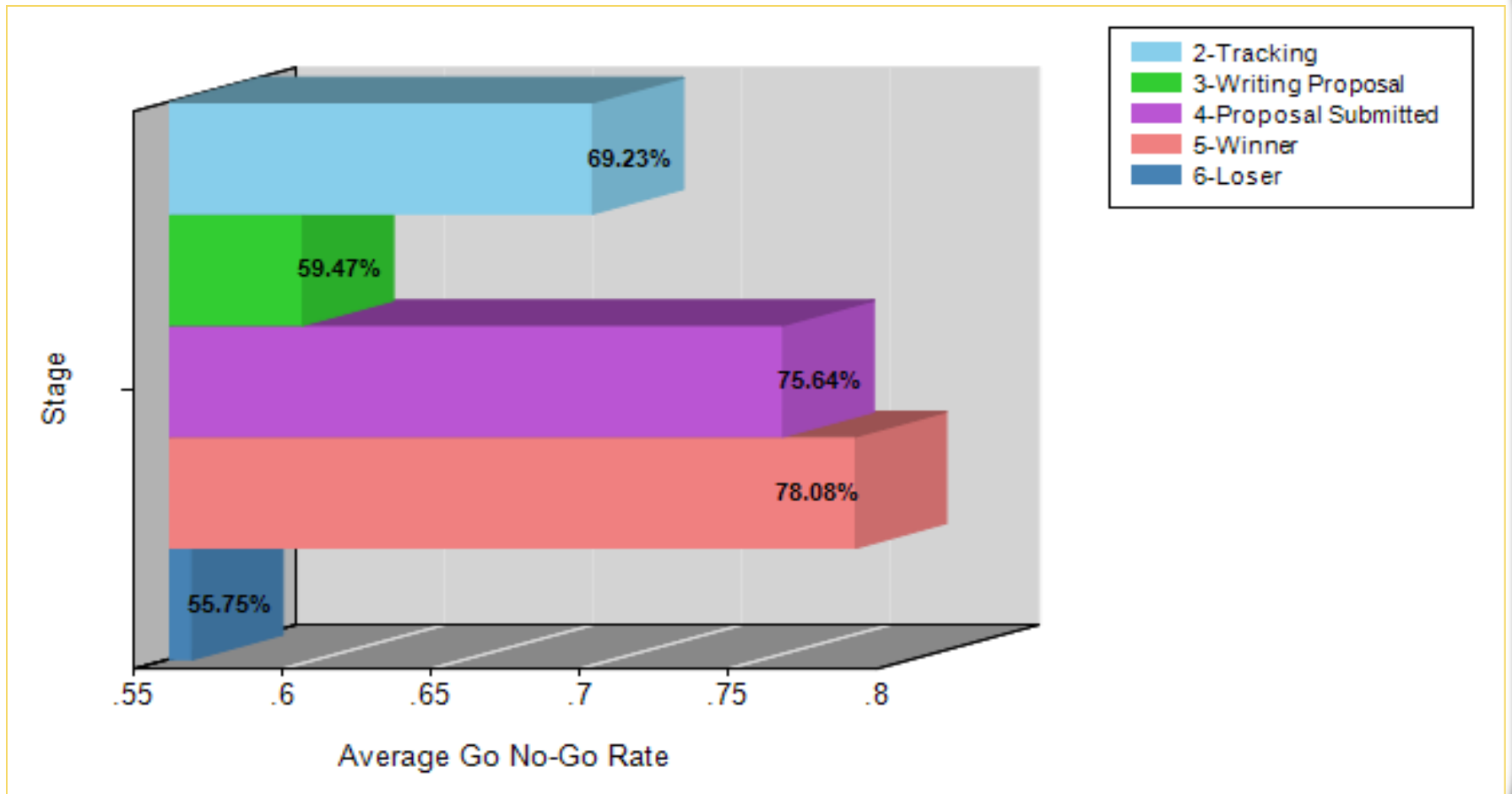
- Pushing the dashboard out to users will override anything they have on the dashboard currently
- A fictitious user can be created to hold the different role based dashboards for pushing out to new users
- Only those with access in their role can push out to other users
- Only favorite reports can be 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.



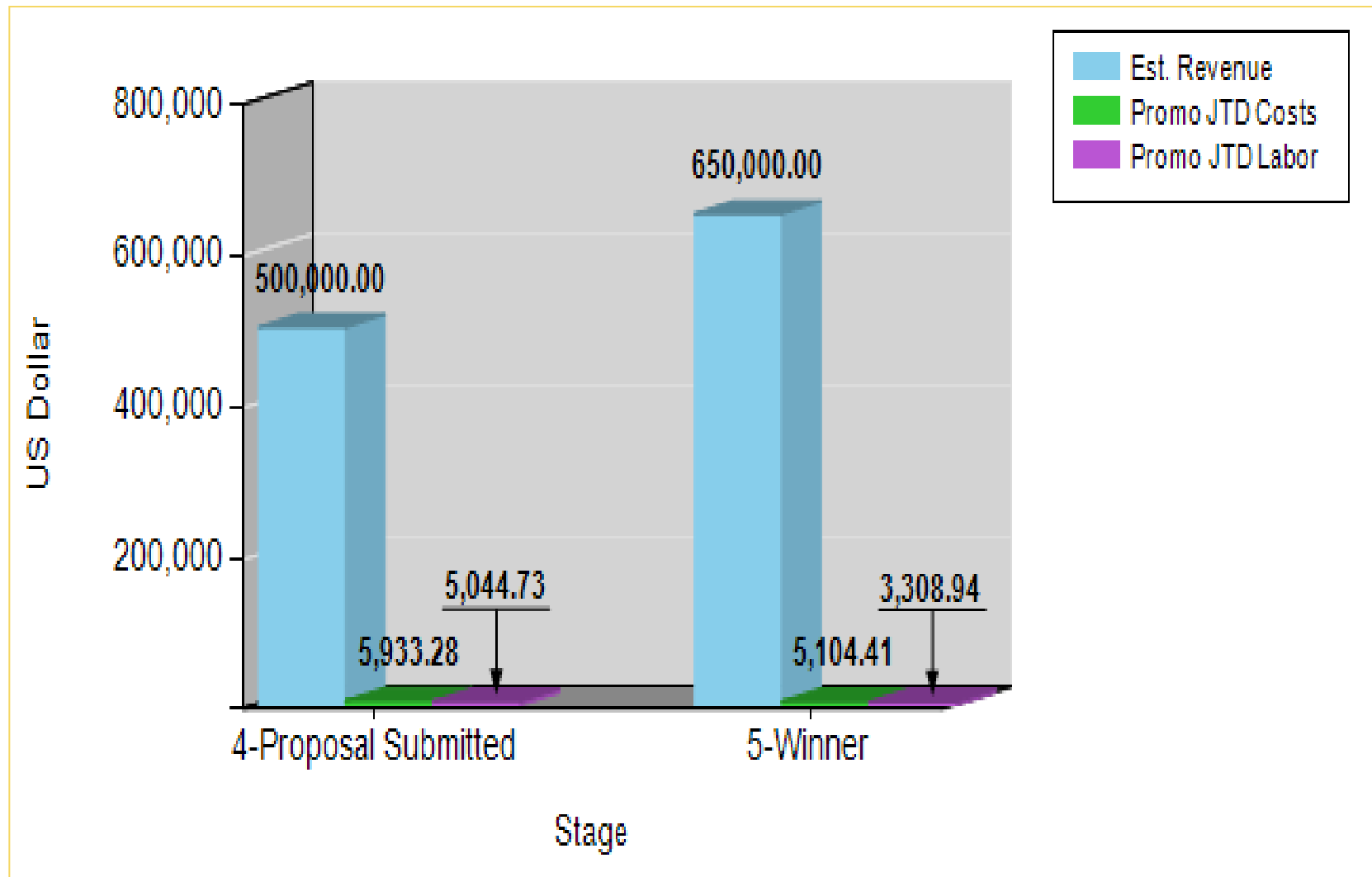
Some Common Graphing Examples



Some Common Graphing Examples



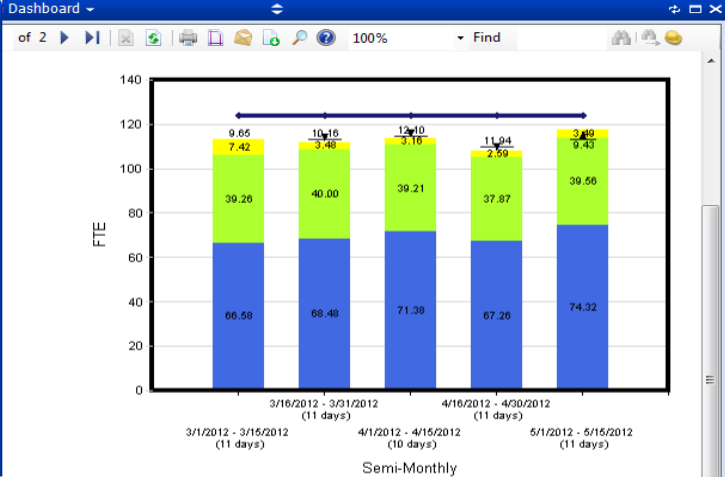
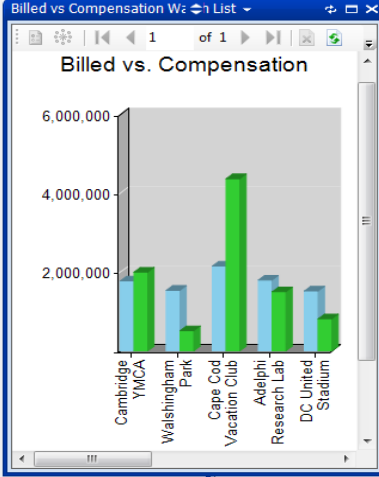
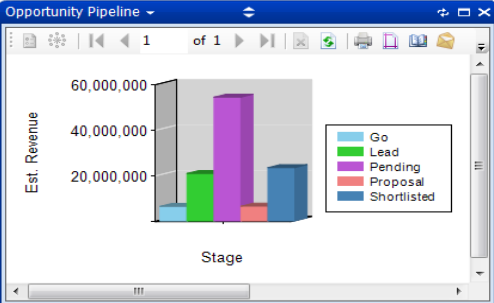
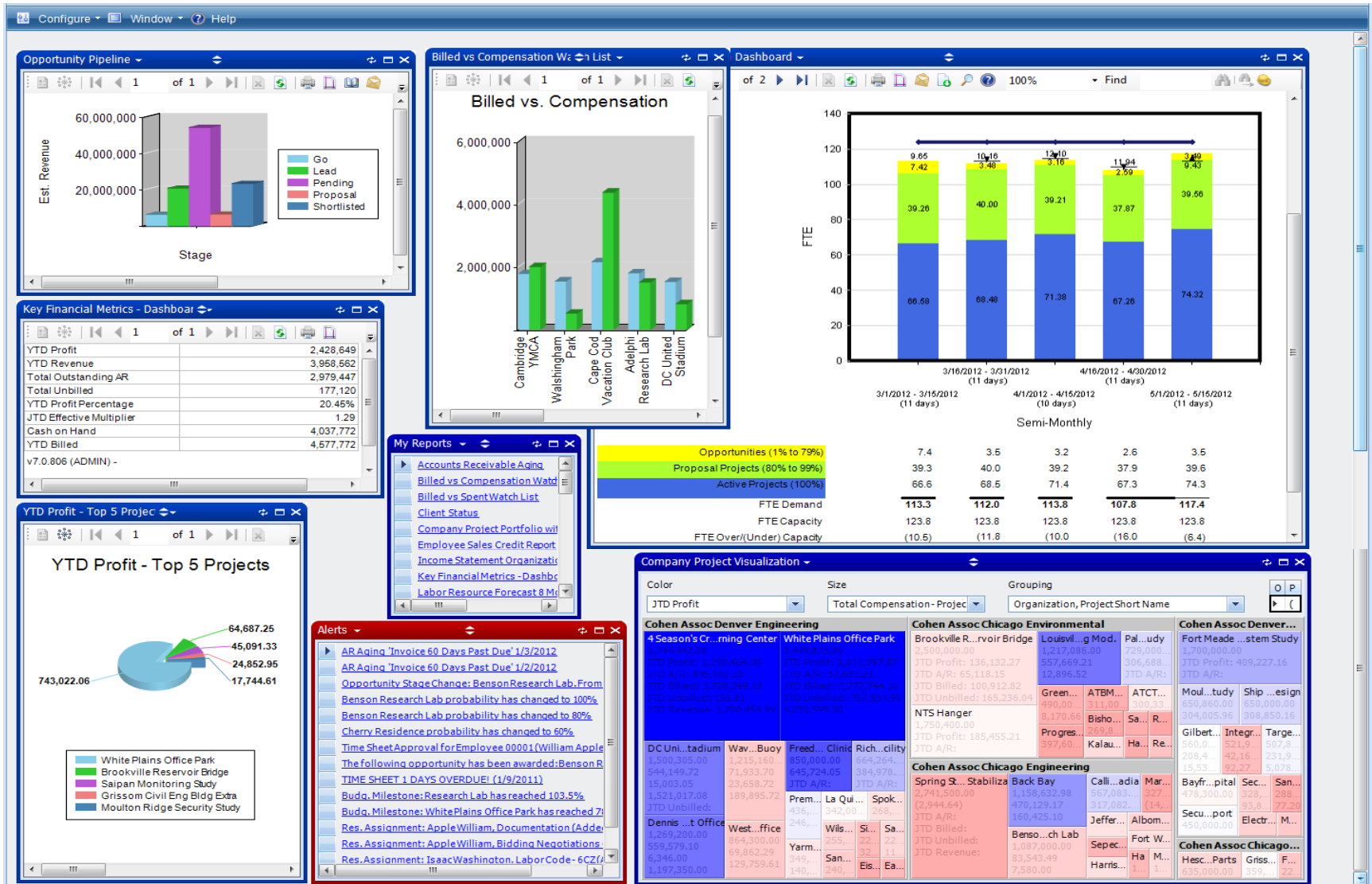
Some Common Graphing Examples



Role Based Examples



Dashboard - Executive



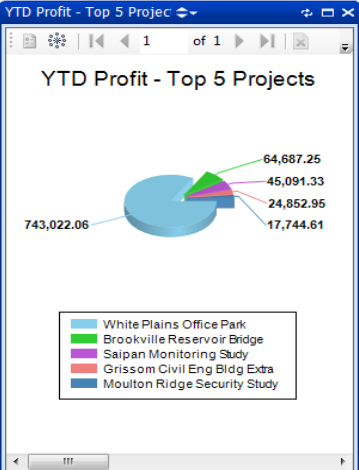
Key Financial Metrics - Dashboard

YTD Profit	2,428,649
YTD Revenue	3,968,562
Total Outstanding AR	2,979,447
Total Unbilled	177,120
YTD Profit Percentage	20.45%
JTD Effective Multiplier	1.29
Cash on Hand	4,037,772
YTD Billed	4,577,772

- ### My Reports
- Accounts Receivable Aging
 - Billed vs Compensation Watch List
 - Billed vs Spent Watch List
 - Client Status
 - Company Project Portfolio
 - Employee Sales Credit Report
 - Income Statement Organization
 - Key Financial Metrics - Dashboard
 - Labor Resource Forecast 8 Months

Opportunities, Proposal, and Active Projects

Category	3/1/2012 - 3/15/2012 (11 days)	3/16/2012 - 3/31/2012 (11 days)	4/1/2012 - 4/15/2012 (10 days)	4/16/2012 - 4/30/2012 (11 days)	5/1/2012 - 5/15/2012 (11 days)
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)



- ### Alerts
- AR Aging Invoice 60 Days Past Due 1/3/2012
 - AR Aging Invoice 60 Days Past Due 1/2/2012
 - Opportunity Stage Change: Benson Research Lab From...
 - Benson Research Lab probability has changed to 100%
 - Benson Research Lab probability has changed to 80%
 - Cherry Residence probability has changed to 60%
 - Time Sheet Approval for Employee 00001 (William Apple)
 - The following opportunity has been awarded: Benson R...
 - TIME SHEET 1 DAYS OVERDUE! (1/9/2011)
 - Budg. Milestone: Research Lab has reached 103.5%
 - Budg. Milestone: White Plains Office Park has reached 7...
 - Res. Assignment: AppleWilliam_Documentation (Add...
 - Res. Assignment: AppleWilliam_Bidding Negotiations
 - Res. Assignment: Isaac Washington_Labor Code- 6CZ

Company Project Visualization

Color	Size	Grouping
JTD Profit	Total Compensation - Projec	Organization, Project Short Name

Project	JTD Profit	JTD Revenue	JTD A/R	JTD Unbilled
Cohen Assoc Denver Engineering	1,230,000.00	1,230,000.00	1,230,000.00	0.00
White Plains Office Park	2,011,397.87	2,011,397.87	2,011,397.87	0.00
Cohen Assoc Chicago Environmental	136,132.27	136,132.27	136,132.27	0.00
Brookville Reservoir Bridge	65,118.15	65,118.15	65,118.15	0.00
Cohen Assoc Chicago Engineering	185,455.21	185,455.21	185,455.21	0.00

Graphing Tab - Opportunity Pipeline Dashpart Report Example

Opportunity Pipeline Options

General | Sorting/Grouping | Columns | Graph | Layout

Show Graph Title

Type: Bar Show 3D

Labels: None

Flip Axes

Y Title: Est. Revenue

Display Data: Weighted Revenue

Add Series

Add Series

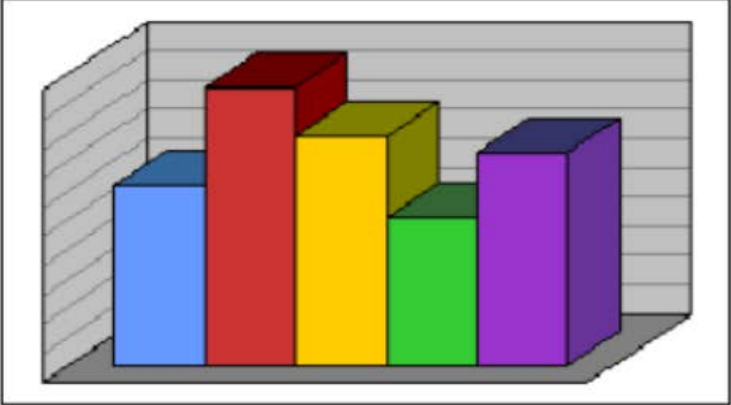
Display Amounts In: Standard Format X Title: Stage

Graph Location and Size

Show: Graph Only Font Size: 8 Height: 2.00 Width: 4.00

Legend: Right - Align Center Top: 0.00 Left: 0.00

Options



Dashboard - Executive cont...

Executive Sample – Pipeline Revenue

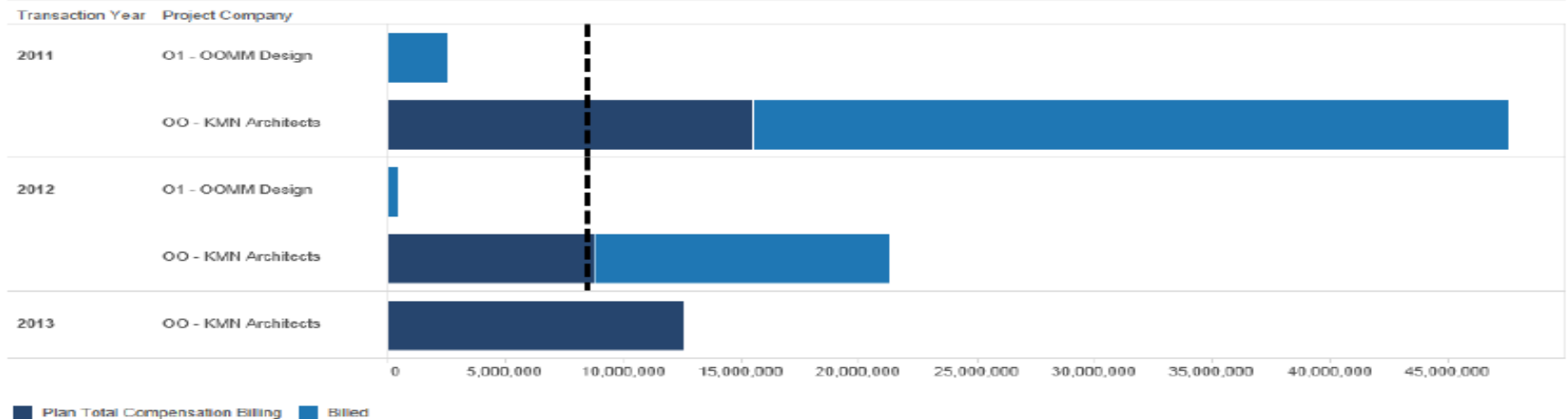
The **Pipeline Revenue** sample dashboard contains a single chart that visualizes a combination of planned billing and actual billing intended to represent the total billings that will be achieved within a specific time period. The default KPI for revenue is included as well. This chart is broken down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

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Executive Sample - Pipeline Revenue

Company (All) Location (All) Project Type (All) Client (All)
Project Manager (All) Project Principal (All) Charge Type Regular Project Status (All) Year (Multiple values)

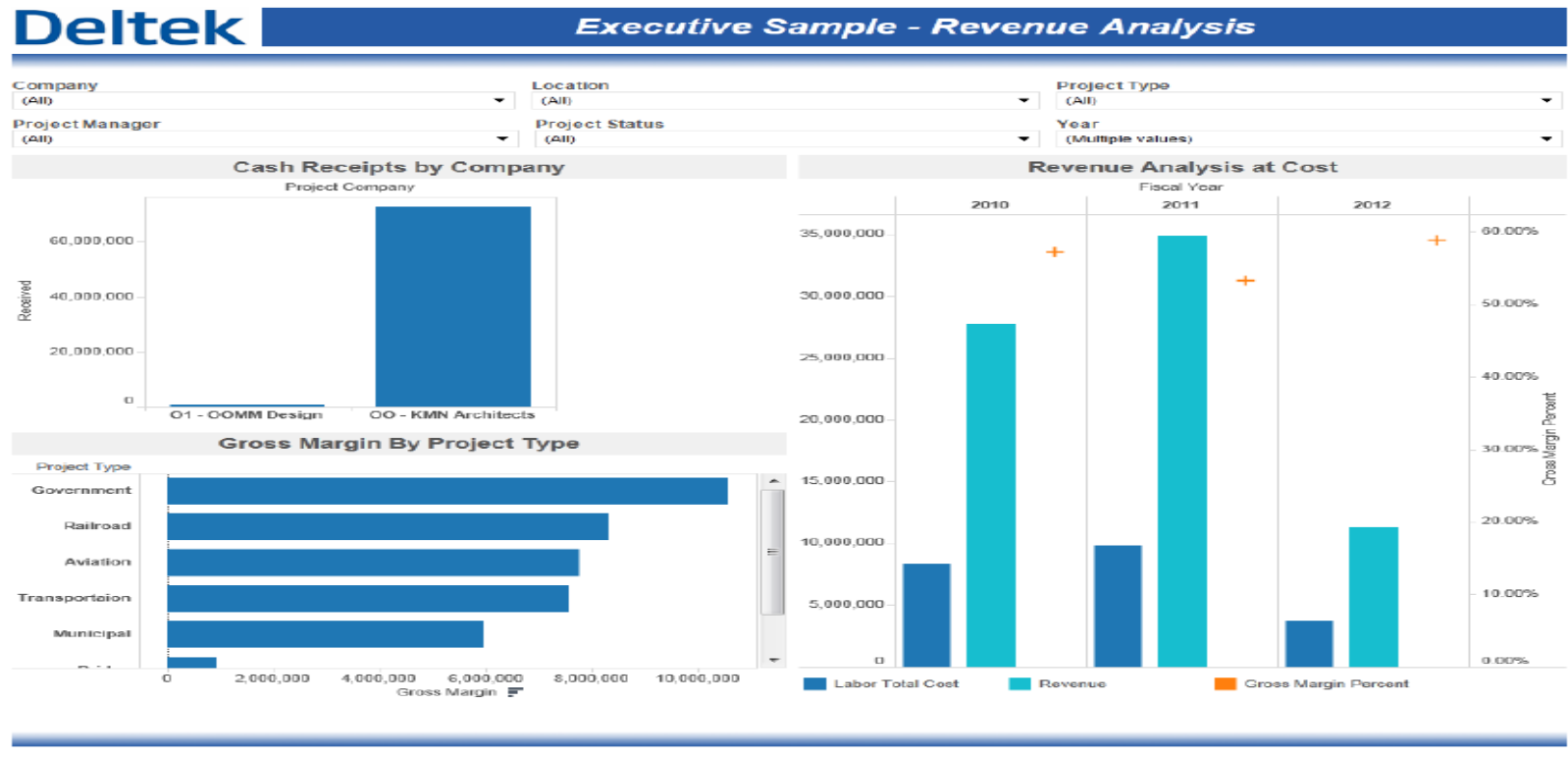
Pipeline Revenue



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.



Dashboard – Executive cont...



Dashboard – Executive cont...

Executive Charts

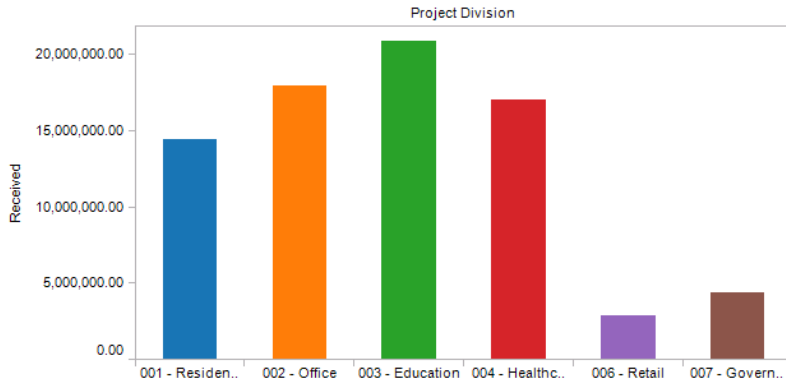
Project Division

- 001 - Residential
- 002 - Office
- 003 - Education
- 004 - Healthcare
- 006 - Retail

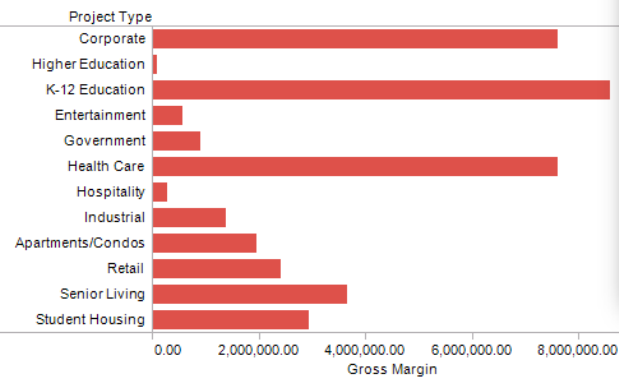
Measure Names

- Labor Total Cost
- Revenue
- Profit Percent

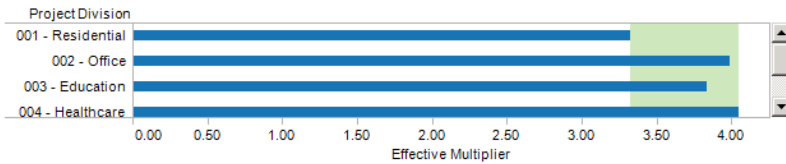
Cash Receipts by DivisionX



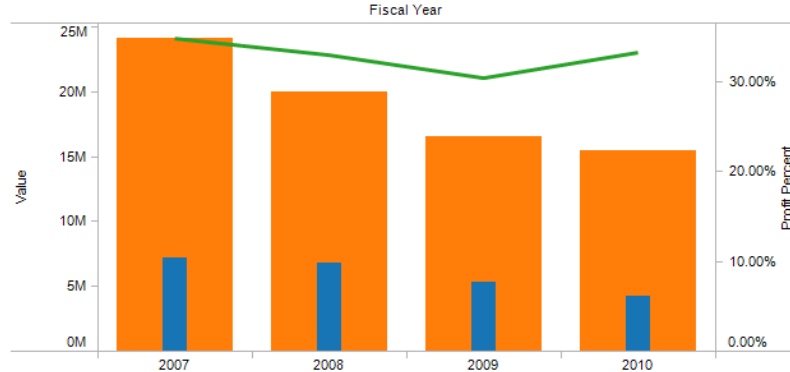
Gross Margin by Project Type



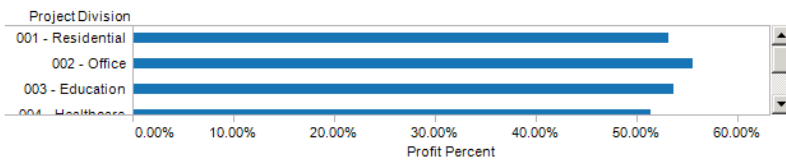
Effective Multiplier



Revenue Analysis



Profit Percent



Dashboard - Finance

The dashboard is divided into several main sections:

- Applications:** A list of navigation links including Accounting - Project Review, Billing - Billing Rate Tables - Activity Code, Billing - Billing Rate Tables - Expense Accounts, Billing - Billing Rate Tables - Expense Categories, Billing - Billing Rate Tables - Expenses by Vendor, Billing - Billing Rate Tables - Labor Categories, Billing - Billing Rate Tables - Labor Overrides, Billing - Billing Rate Tables - Labor Rates, Info Center - Employees, Info Center - Projects, Time & Expense - Expense Line Approval, Time & Expense - Expense Report, Time & Expense - Timesheet, Time & Expense - Timesheet Line Approval, and Utilities - Change Period.
- My Payroll Applications:** A list of navigation links including Configuration - Payroll - Contribution Codes, Configuration - Payroll - Contribution Rate Tables, Configuration - Payroll - General, Configuration - Payroll - User Defined Tax Locations, Configuration - Payroll - Withholding Codes, Human Resources - Benefit Hours - Accruals, Human Resources - Benefit Hours - Adjustments, Human Resources - Employee Review, Human Resources - Payroll - Direct Deposit, Human Resources - Payroll - Form W-2 Process, Human Resources - Payroll - Payroll Processing, Human Resources - Payroll - Quarterly Process, Info Center - Employees, and Reporting - Payroll.
- Clients:** A table listing client information:

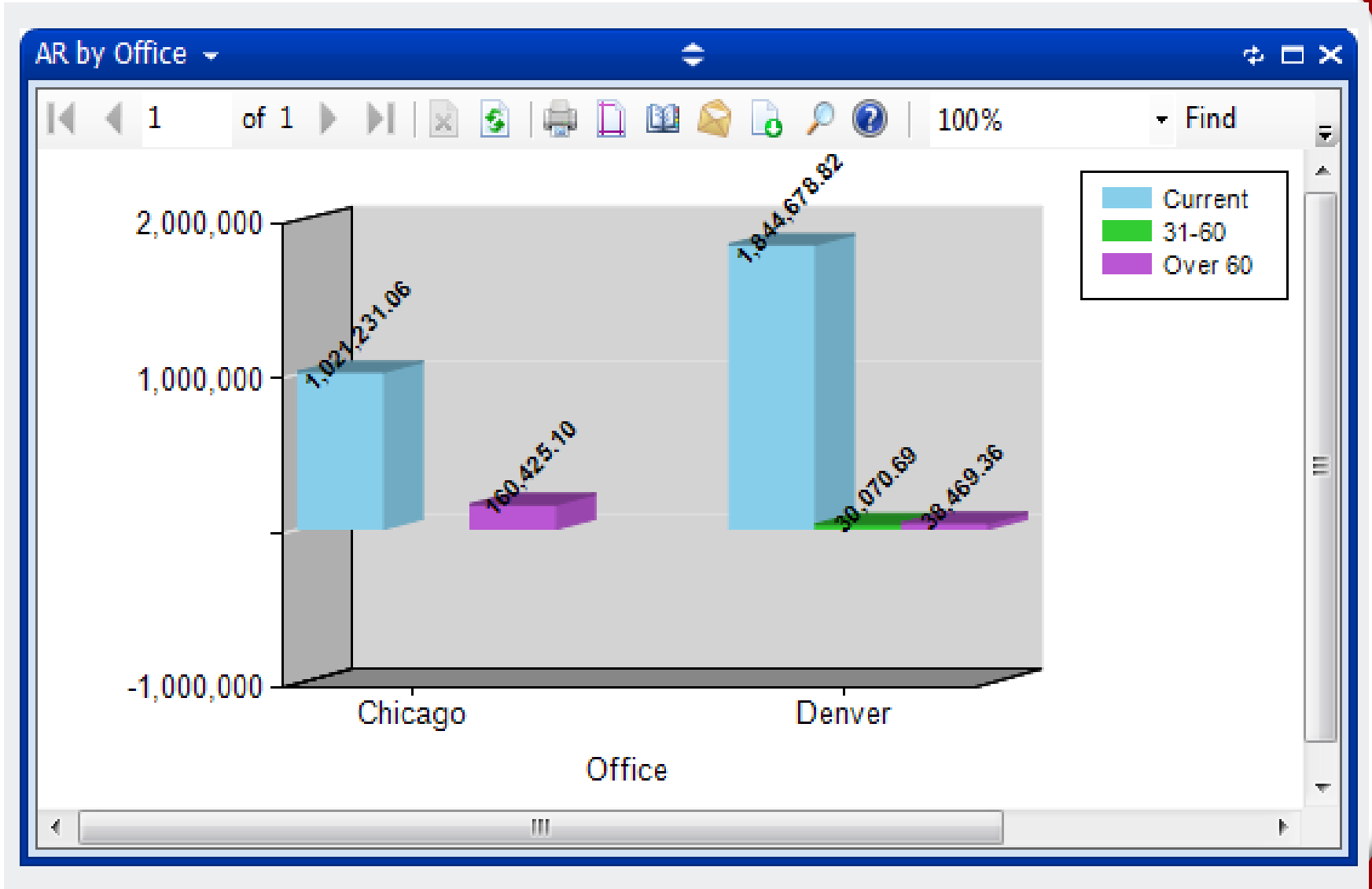
Name	City (primary)	State (primary)	
Anderson & Associates, LLC	New York	New York	U:
Atlantic Research Corporation	Alexandria	Virginia	U:
Cartier Group of Lower Baltimore	Baltimore	Maryland	U:
Dalton Brothers Construction Co.	Las Vegas	Nevada	U:
- Key Financial Metrics:** A summary of financial data:

YTD Revenue	3,952,443
YTD Expenses	2,361,649
YTD Profit	1,590,794
Cash Balance	14,351
YTD Effective Multiplier	2.87
Number of Full-Time Employees	37
Average age of receivables	3,034
Period Range Profit Percentage	30%
Backlog	28,419,765
Outstanding AR (91-120)	
YTD - Utilization	53%
YTD Actual Overhead Rate	45
YTD Billed	2,391,918
YTD Cash Change	-13,141
JTD Effective Multiplier	2.85
Opportunity Hit Rate	
Outstanding AR (Over 120)	2,459,208
YTD Realization Ratio	.98
YTD - Utilization [Direct/(Std - Benefit)]	-69%
v7.1.500 (KEVIN) -	
- My Financial Reports:** A list of report links including Default WIP Report, Fitzgerald Engineers on my Projects, Karens progress report one off, Kevin PPV, Month end Backlog by Branch, My Projects Profitability, PM Collection AR aging, Project Detail Report w Proj Info, Standard Balance Sheet, Standard Income Statement, Stan's fav, Weekly Accountability, and YTD Budgeted vs Actual Example.
- My clients Over 60:** A report titled "Aged Accounts Receivable" for Demo Company, aged as of 8/21/2013, Job-to-Date through 7/26/2005. The report shows a table of invoices with columns for Invoice, Date, Balance, Current, 31-60, 61-90, and 91-120.

Invoice	Date	Balance	Current	31-60	61-90	91-120
Primary Client Name: Atlantic Research Corporation						
Project Number: 01999.01.000 Johnson & Johnson Research Center / Principal: Bartlett / Account Director						
0000168	5/15/2004	2,695.74				
0000185	11/30/2005	6,187.50				
0000197	4/30/2005	122,342.50				
0000212	5/30/2005	14,990.43				
0001035	6/15/2005	24,137.31				
0001036	6/15/2005	173,587.50				
Total for 01999.01.000		343,940.98				
Project Number: 020C2.00.201 Novvis Telecom Headquarters / Principal: Bartlett / Account Director: An						



Dashboard - Finance



Dashboard - Finance

Finance Balance Sheet Charts

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Finance Sample - Balance Sheet Charts

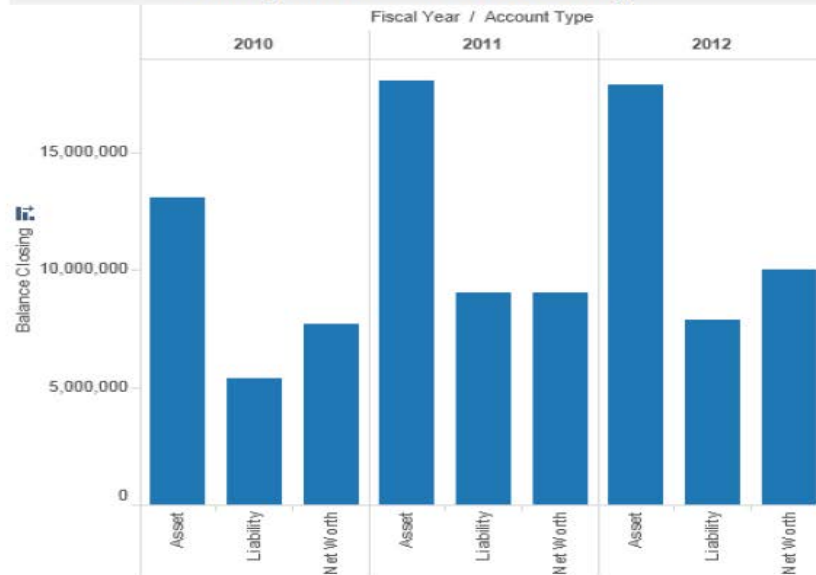
Balance Sheet Account Type

(All)

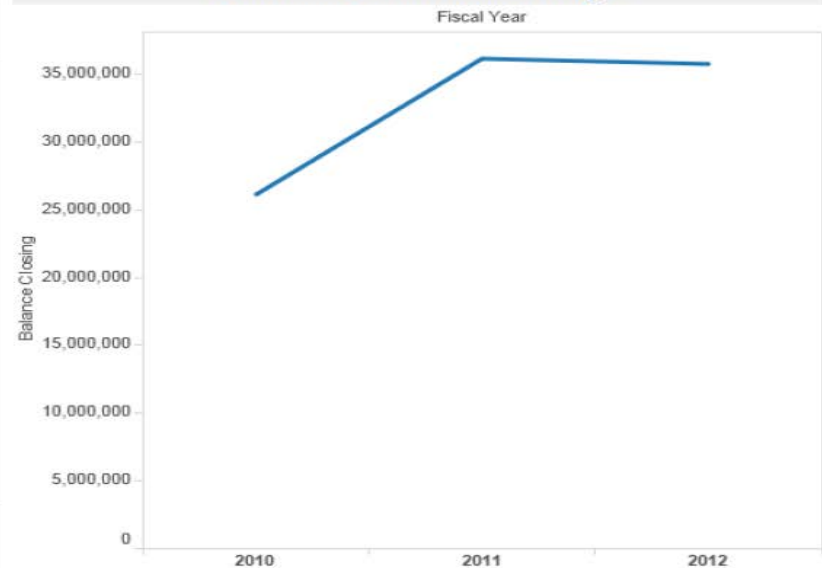
Year

(Multiple values)

Total by Balance Sheet Account Type



Total Balance 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



Dashboard - Finance

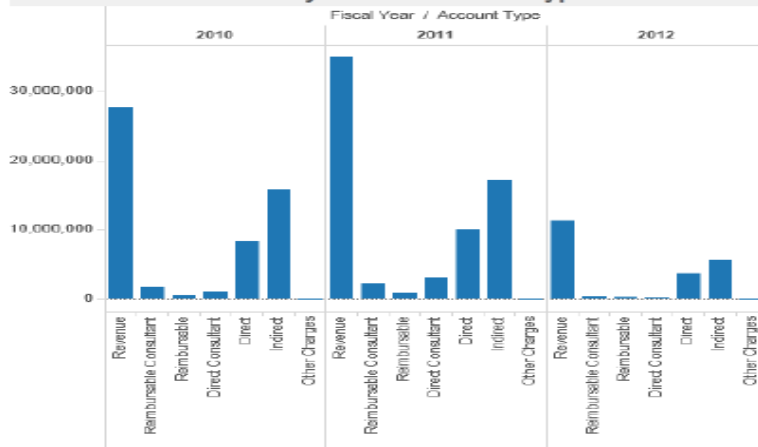
Finance Income Charts

Deltek

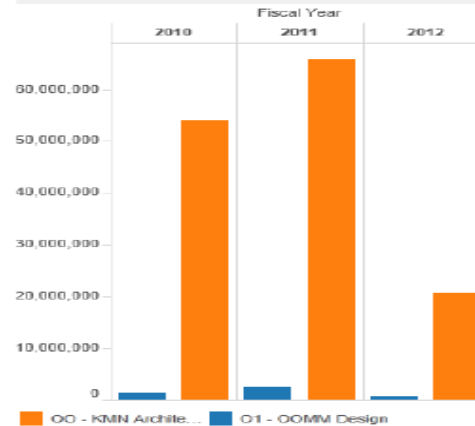
Finance Sample - Income Charts

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

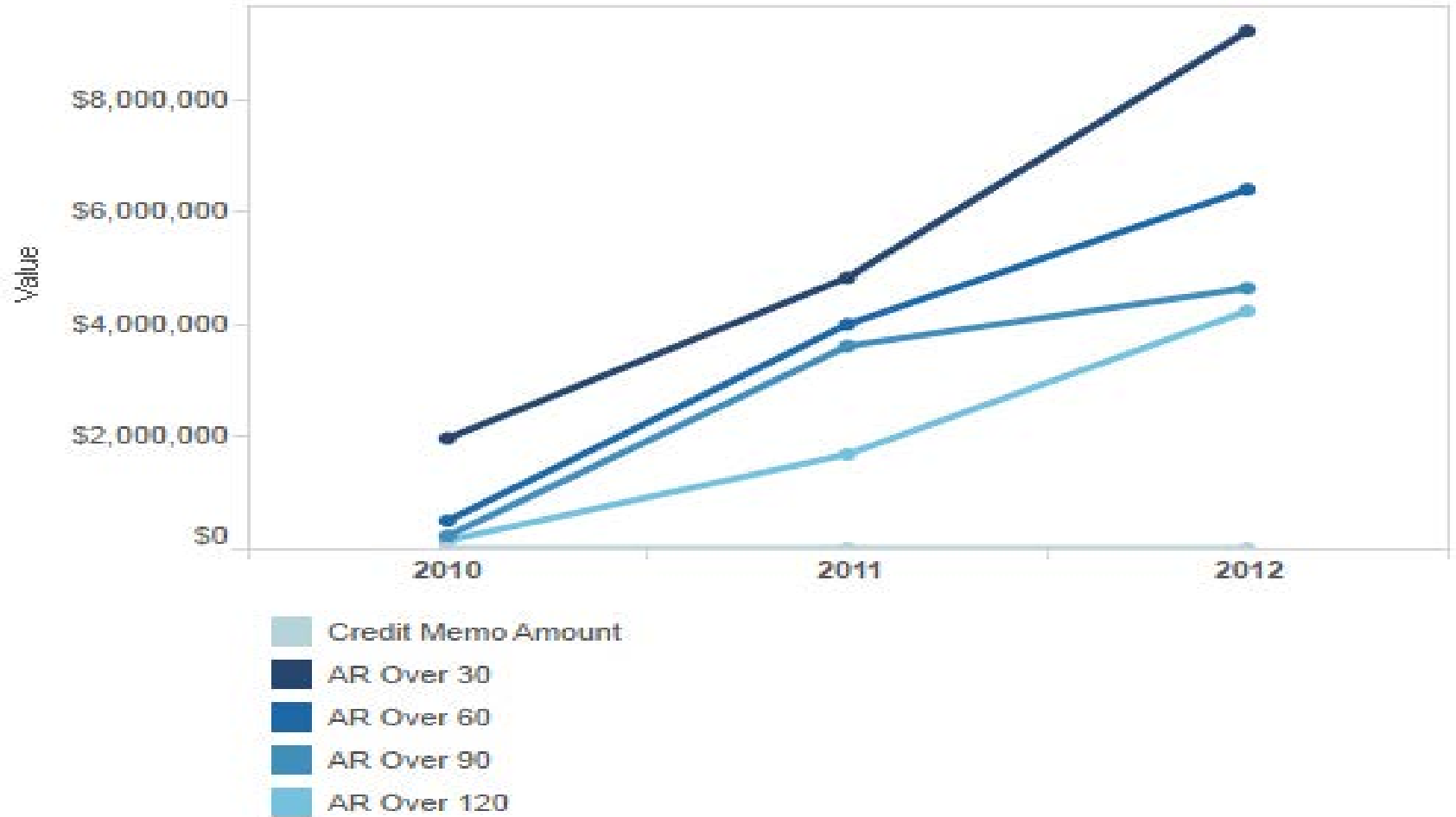
Account Type	Company	Fiscal Year		
		2010	2011	2012
Revenue	O1 - OOMM Design	988,925	1,752,475	515,867
	OO - KMN Architects	26,768,294	33,102,523	10,762,409
Reimbursable Consultant	O1 - OOMM Design	40,599	92,366	31,285
	OO - KMN Architects	1,711,327	2,152,083	435,234
Reimbursable	O1 - OOMM Design	5,522	16,262	22,819
	OO - KMN Architects	600,557	832,419	262,705
Direct Consultant	O1 - OOMM Design	1,122	0	0
	OO - KMN Architects	1,006,921	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
	O1 - OOMM Design	102,694	233,193	86,819
Indirect	OO - KMN Architects	15,722,793	16,962,224	5,600,409
	O1 - OOMM Design	60	0	0
Other Charges	O1 - OOMM Design	60	0	0
	OO - KMN Architects	-42,414	6,235	-2,803



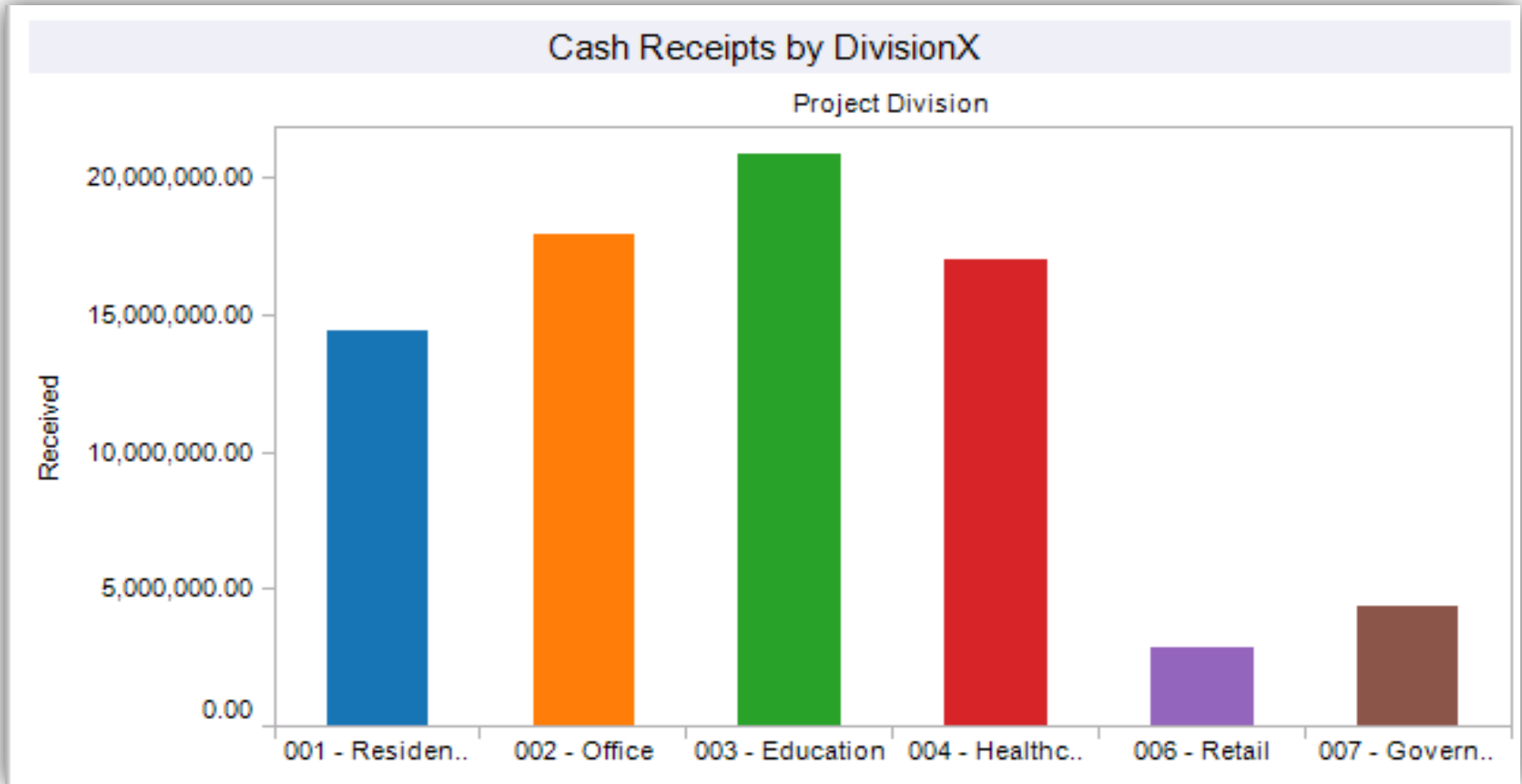
Dashboard - Finance

AR Trend

Fiscal Year



Dashboard - Finance



Dashboard – Project Management

Configure Window Help

My Shortcuts

- Accounting - Accounts Receivable - Invoice Review
- Accounting - Budgeting - Project Budgeting
- Accounting - Project Review
- Reporting - Project
- Time & Expense - Expense Report
- Time & Expense - Timesheet

Reports

- ABC - JTD Time incl Unposted
- Aging By Client
- Office Earnings Chart
- Planning Performance Report
- Planning Performance Report 3 Projects
- Pre-Bill

Important Links

- 2013 A&B Bill Rates
- Delttek Support

My Active Projects as PM

Project	Short Name	
0000.TEST.2	A/E Project for Primary Care Additi	Ve
2003.0050.0	Adelphi Research Lab	Bi
1999.0150.0	Balboa Office Park	Di
0010.9092.0	BWCH	At
0994.6289.2	Faulkner Clinic	At
1998.0010.0	Fenway Park Wall	Th
2002.0190.0	Fenway Park Wall Seating	Th
2000.2500.0	Fox Run Expansion	At
2000.0020.0	Government Center	Ci
1999.0100.0	Johnson & Johnson Research Cent	At
2000.0100.0	Kennedy School Addition	Th
1999.0250.0	Marblehead Public Library	Tc
0020.2020.2	Martinville Children's Hospital	At
0040.1010.1	Moscone School	Se
2002.5020.0	Newtown Village Airport Renovatio	Di
2002.0010.0	Novvis Lab	At
20C2.0020.1	Novvis Telecom Headquarters	At
2002.0100.0	Oak Ridge Center - Feasibility Stud	Te
1980.1800.9	Pershing VA Hospital	Ve
0839.2890.2	Reston Health Facility	W
2000.0050.0	The Mel Torme Auditorium	Ci
0033.0909.0	VA Emergency Care Facility	Ve
0021.0030.0	West End Women's Hospital	At
1999.0130.0	West Glen Elementary School Addit	Ci

Contacts

Name	Title	
Baldwin, Virigina	Chief Executive Officer	Wes
Bovis, John	Director of Marketing	Atla
Brown, Morgan	President	San I
Childs, Richard		
Collier, Paul	Project Manager	Atla
Dacey, Kayla	Project Manager	City
Davis, Mary Sue	Contracts Administrator	City
Durnham, Charles	Contracts Administrator	Vete
Edwards, Jonathan	Vice President	BioM
Grafton, Susan	Chief Financial Officer	Atla
Perkins, Marcus		Vete
Sears, Joan	Proposal Coordinator	Atla
Simpson, Michael	Project Manager	Tow
Stringham, William	Chief Information Officer	Dalt
Taylor, Wesley	Project Manager	Atla

Ready



Dashboard – Project Management

Dashboard - Tuesday, February 09, 2010

Configure Window Help

Alerts

- Res. Assignment: Apple William, City Hall Facade Rv
- Res. Assignment: Apple William, Construction Docu
- Res. Assignment: Apple William, Ipswich Public Libr
- Res. Assignment: Apple William, Ipswich Public Libr
- Res. Assignment: Apple William, preliminary design

My Apps

- Calendar/Activities - Activity Manager
- Calendar/Activities - Calendar
- Info Center - Companies
- Info Center - Contacts
- Info Center - Projects

Favorite Reports

- A&B Visualization
- Accounts Receivable Aging
- Consultant Ledger
- Earned Value Chart
- My Project Detail Report
- My Project Progress Report
- Opportunity Pipeline
- Planning Performance Report

My Project Budgets

Name	Prim.
Adelphi Research Lab	BioMed Techn
Cape Cod Vacation Club	Cape Cod De
Civic Center Renovation	
Hilton Head Clinic Expansion	Anderson & A
Page County Landfill Study	Town of Mart

My Projects

Project	Short Name
1998005.00	Cambridge YMCA
2002005.00	Cape Cod Vacation Club
WAYNLMP.01	GMO - Threshold Timber Tennessee
WAYNLMP.02	GMO-Threshold Timber Tennessee
WAYNLMP.03	GMO-Threshold Timber Tennessee
1999050.00	Page Community Landfill
2000013.00	Waterfront Mall of Hull


My Contacts

Name	Title
Collier, Paul	Project Manager
Edwards, Jonath	Vice President
Jermon, Peter	Chief Executive Officer
Lawless, James	Chief Executive Officer
Martindale, Matth	Contracts Administrator
Stone, Richard	Chief Financial Officer

My Pending Opps

Name	Prim.
A/E Project for Primary Care Addit	Veterans Hea
Abington Elementary School	City of Charlc
Adelphi Research Lab	Atlantic Rese.

FedBiz Opps



Welcome fedbiz

My Activities

Start Date	Start Time	Type	Subject
7/3/2009	8:00 AM	Meeting	Vacation

My Project Backlog

Color	Size
Backlog	None
200300...arch Lab Backlog: 488,658 JTD A/R: 60,555 61,342 550,000	WAYNL...see - 03 Backlog: JTD A/R: JTD Revenue:
200200...ion Club Backlog: 1,398,508 JTD A/R: 6,492 6,400,000	WAYNL...see - 02 Backlog: JTD A/R: JTD Revenue:
WAYNL...see - 01 Backlog: JTD A/R: JTD Revenue:	200001...ll of Hull Backlog: (178,050) JTD A/R: 82,057 178,050
	19990... Study (90,167) 61,150 160,167 70,000
	19980... YMCA (3,208) JTD A/R: 3,208
	1999015...ffice Park Backlog: (17,920) JTD A/R: 11,649 JTD A/R: (18,373) 95,950 19,353 78,030
	199...dfill Backlog: (17,920) JTD A/R: 11,649 JTD A/R: (18,373) 10,709 19,353 31,000
	2000011...ont Park Backlog: 472,049 JTD A/R: 41,399 41,399 513,448

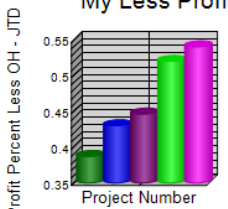
My Linked In

Basic Account: Upgrade

LinkedIn Home Profile Contacts Groups J

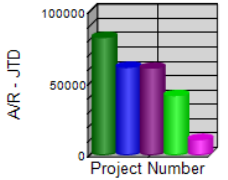
Do you like doing taxes? - Firms a

My Less Profitable Projects



Project	Profit Percent Less OH - JTD
Waterfront Mall of Hull	~0.40
Adelphi Research Lab	~0.45
Page Community Landfill	~0.48
Balboa Office Park	~0.52
ABC Plaza Study	~0.55

Project for Collections



Project	A/R - JTD
Waterfront Mall of Hull	~80,000
ABC Plaza Study	~60,000
Adelphi Research Lab	~50,000
Belmont Park	~30,000
Page Community Landfill	~10,000

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

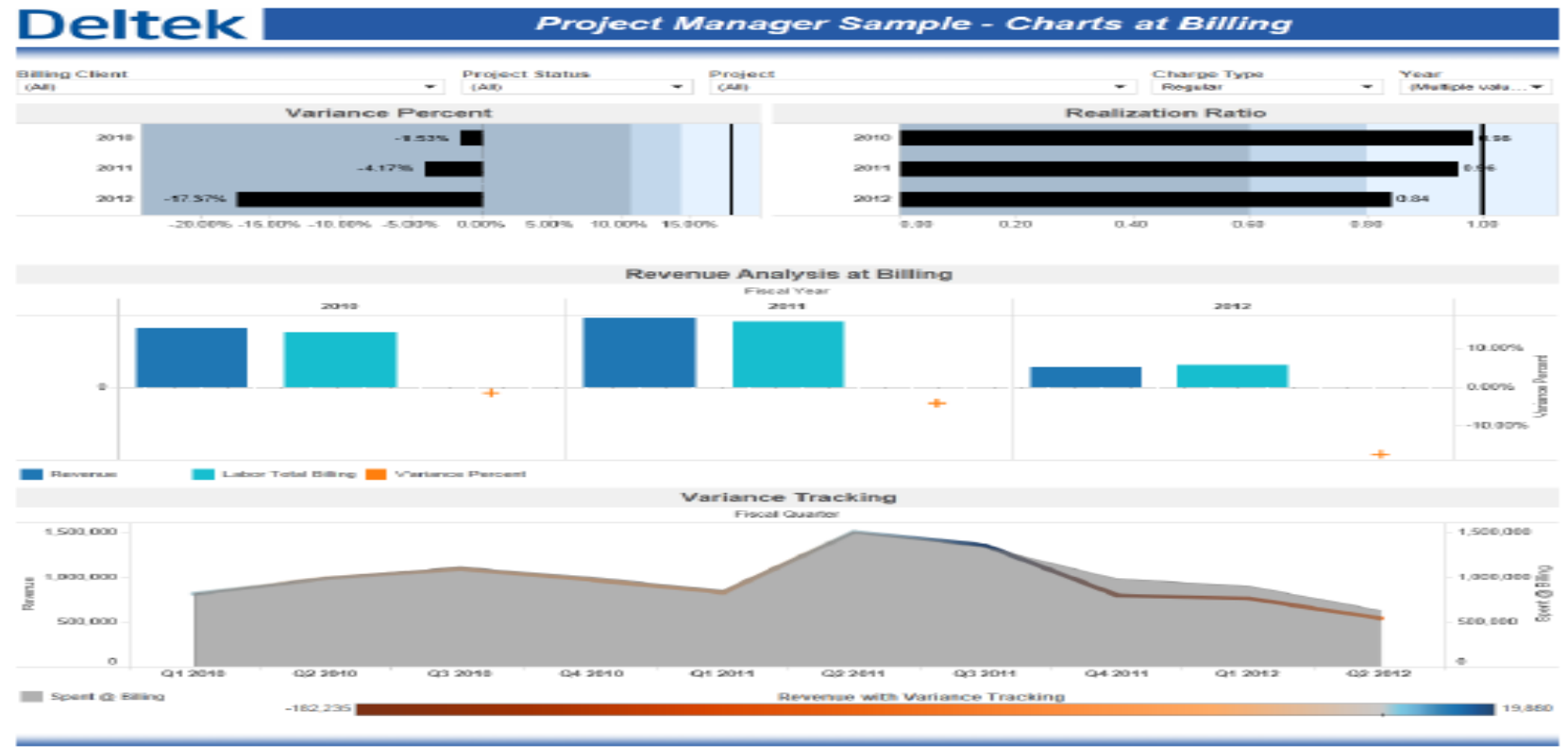
Project Budget						
Project Number - Short Name	Baseline Labor Billing	Labor Total Billing	EAC Labor Billing	Total Baseline - EAC Labor Billing	EAC Multiplier Billing	AR Over 60
				190,465,140		
				190,465,140		
		0		190,465,140		
		41,654	41,654	190,423,486	7,306.15	
		11,139	11,139	190,454,001	27,321.59	
		30,163	30,163	190,434,977	10,089.40	
		60,557	60,557	190,404,583	5,025.55	
		10,183	10,183	190,454,957	29,687.19	
		64,069	64,069	190,401,071	4,750.11	
	11,457	3,501	3,501	190,481,639	86,929.68	
	122,056	226,607	226,607	190,238,533	1,342.90	
	108,249	96,861	96,861	190,388,279	3,141.93	
	109,960	102,984	102,984	190,382,156	2,955.11	
				190,465,140		
		48,985	48,985	190,418,175	6,479.92	
				190,465,140		
	5,833	4,239	4,239	190,460,901	71,792.89	
		5,022	5,022	190,480,118	60,595.37	
	0	93,688	93,688	190,371,452	3,248.26	



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.



Dashboard - Marketing

Dashboard - Tuesday, February 09, 2010

Configure Window Help

Alerts

You do not have any alerts at this time.

Proposals Due This Week

Name	Primary Company
Abington Elementary School	City of Charlotte
Children's Hospital Expansion	Atlantic Research Corporation
Hilton Head VA Clinic Expansion an	Veterans Health Administrat
Lower Patuxent Waste Water Treat	Metropolitan District Commiss

My To Do List

Start Date	Start Time	Type	Subject
2/9/2010	11:00 AM	Meeting	Staff Meeting
2/14/2010	7:00 PM	Appointme	Dinner with Husband
2/25/2010	8:00 AM	Appointme	ACEC Convention
3/1/2010	8:00 AM	Meeting	ACEC Convention

My Linked In

Basic Account: Upgrade

LinkedIn Home Profile Conta

Do you like doi

My Apps

- [Calendar/Activities - Activity Manager](#)
- [Calendar/Activities - Calendar](#)
- [Info Center - Companies](#)
- [Info Center - Contacts](#)
- [Info Center - Employees](#)

New Opps This Week

Name	Primary Company
Boston Women's and Children's Ho	Atlantic Research Corporation
Calvert Middle School	Calvert County Schools
Concord Center for the Arts	The Concord Corporation
I-66 Expansion	Virginia Department of Transp

Company Pending Opps

Name	Primary Company
A/E Project for Primary Care Additi	Veterans Health Administration
Abington Elementary School	City of Charlotte
Adelphi Research Lab	Atlantic Research Corporation
Anderson Clinic Expansion	Anderson & Associates, LLC

New Emps Needing Mkt

Name	Title
Apple, William	Project Manage
Brady, Michael	Mechanical Engi
Gonzalez, Luis	Interior Designe

Reports

- [Hit Rate by Office](#)
- [Opportunity Pipeline](#)
- [Opportunity Quarterly Forecast](#)
- [Top 20 Projects by Revenue](#)
- [Top Performing Clients](#)

Leads to be Qualified This Weel

Name	Title
Bernstein, Charles	Chief Executive Officer
Wilson, Charlene	Chief Financial Officer

Active Proposals

- [Adelphi Research Lab Proposal \(Custom\)](#)
- [Cannon Ballpark Renovation \(Custom\)](#)
- [City of Cambridge YMCA \(Custom\)](#)
- [Fairlakes Office Complex \(Custom\)](#)
- [Follow up Letter for Medical Facility Campaign \(Custom\)](#)

Opportunity Pipeline

Category	Percentage
Pending	19.78 %
Lead	15.59 %
Awarded	45.71 %

Minority Consultants

Name	City (prim)
AJ Carl Engineers	Boston
Fitzgerald Engineering Inc.	Chapel Hill
Xionic Architectural Firm	Beverly Hills

Projects Needing Marketing Inf

Project	Short Name	Pri
1999001.00	City Park Crosswalk Feasibility Stud	The Summer
0040101.01	Moscone School	San Francis
1995097.00	North River Environment Test Labo	North Shore
0888888.88	test template/default	

Active Marketing Campaigns

Name	Status	Campaig
Best Practices for School Design	Active	Cohen, Grace
Classroom Design White Paper	Active	Morgan, Cheryl
K-12 Newsletter	Active	Morgan, Cheryl
Medical Facilities Campaign	Active	Bartlett, James

My Links

- [FedBiz Ops](#)
- [Linked In](#)
- [My Company Web Site](#)
- [My Web Mail](#)

FedBiz Ops

Welcome to **fedbizops.com**

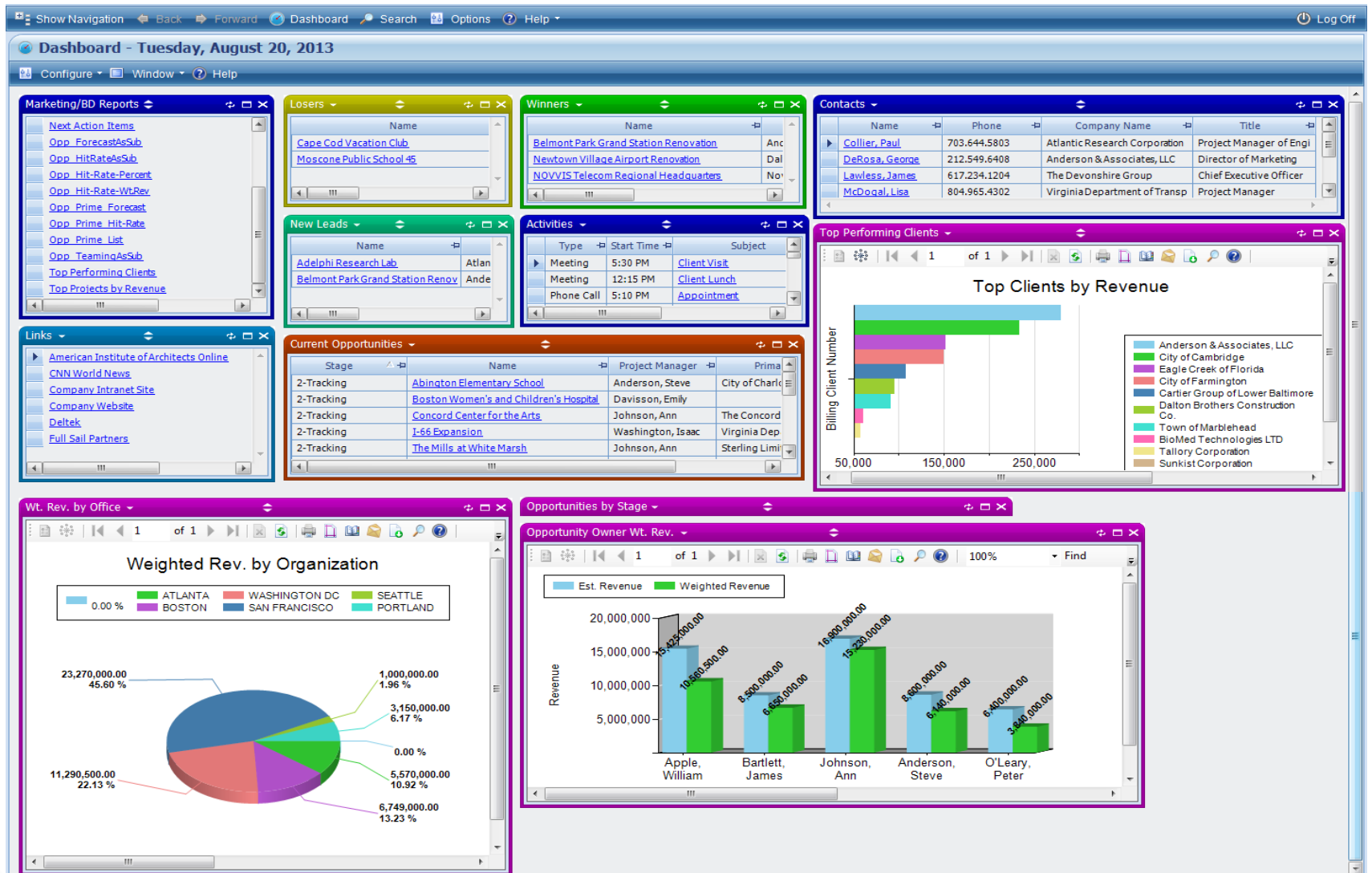
Related Searches: [Federal Contracts](#), [Federal Bids](#), [Federal Govt Jobs](#), [Construction Bid Proposal](#)

Company Metrics

YTD Revenue	3,952,503.29
Backlog	17,542,375.35
YTD Actual Overhead Rate	0.28
Number of Full-Time Employees	33.00
Opportunity Hit Rate	



Dashboard - Marketing



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.

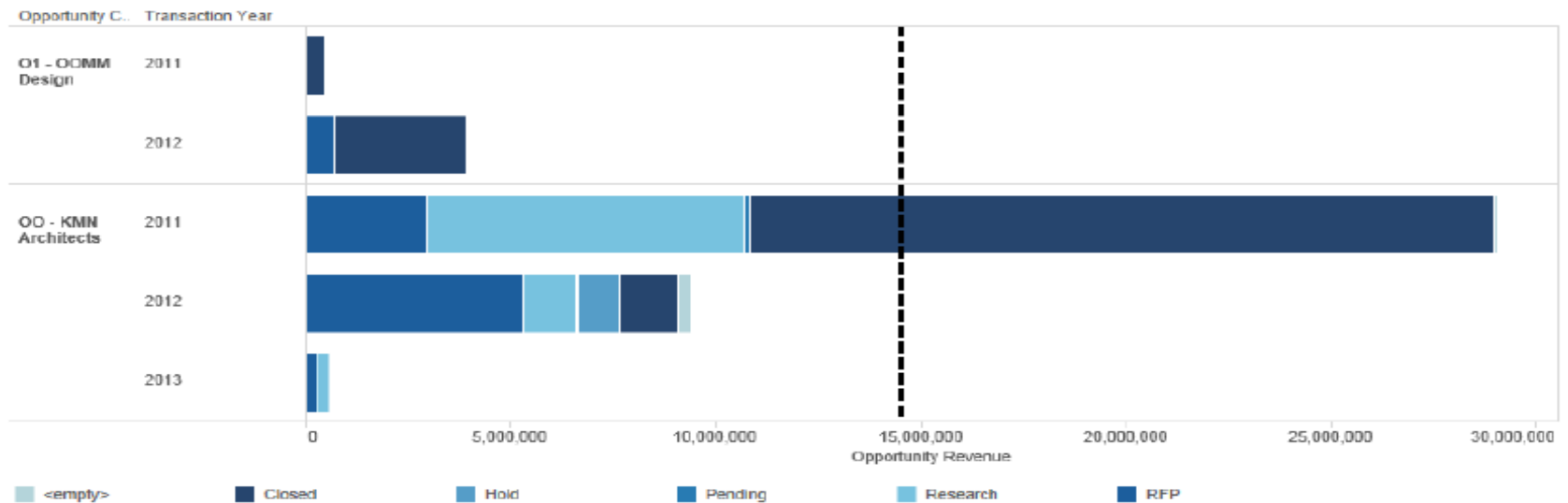
Deltek

BD Manager Sample - Opportunity Wins and Projections

Opportunity Company (All) Opportunity Location (All) Opportunity Primary Client (All)

Opportunity Stage (All) Opportunity Type (All) Year (Multiple values)

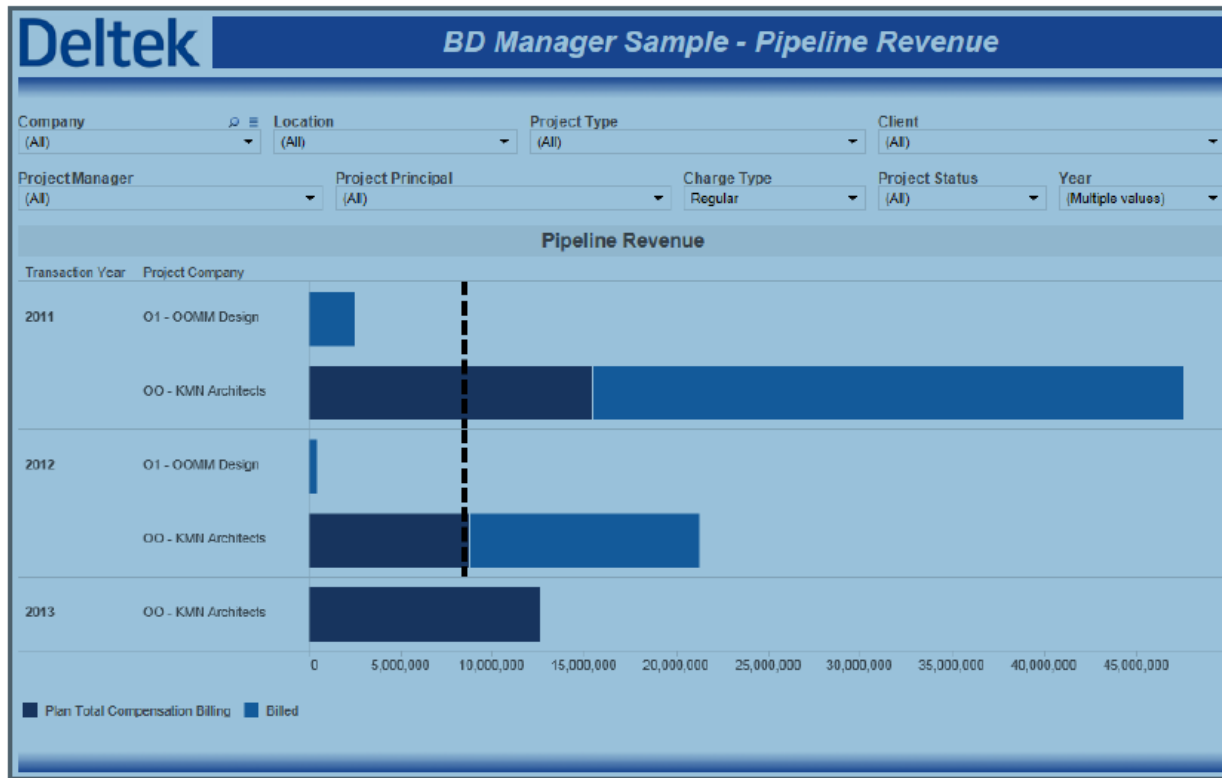
Wins and Projections from Opportunities



Dashboard - Marketing

BD Manager 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.



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



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



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



Questions?

