

# Deltek Costpoint 8 Business Intelligence Executive Dashboard



Use the **Executive Dashboard** to provide a high level insight into overall contract information. The Executive Dashboard is comprised of multiple packages in BI, Project Reporting, Contracts, Accounts Receivable, and General Ledger. To view this dashboard users must be in the Manage User Group of CER\_EXEC\_SECURE This prebuilt dashboard provides drill down capabilities pulling data ranging from Project Pipelines to Project Expense. Each individual header opens up to an array of colorful dashboards and a variety of information pulled directly from Costpoint.



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**1. Pipeline:** Provided as a bar chart, this tab is individually filtered by Company Name and Include in Current Pipeline flag. The bar chart provides an overall pipeline view of Total Opportunity Value by Estimated Start Date and are color coded by Opportunity State Description. Provided at the top of the dashboard are widgets that are driven by the data on the bar chart, clicking on a piece of the chart will result in the values in # of Opportunities, Our Opportunity and Weighted Revenue to change. Filters incorporated into this dashboard are Company Name and Include in Current Pipeline (Y/N).

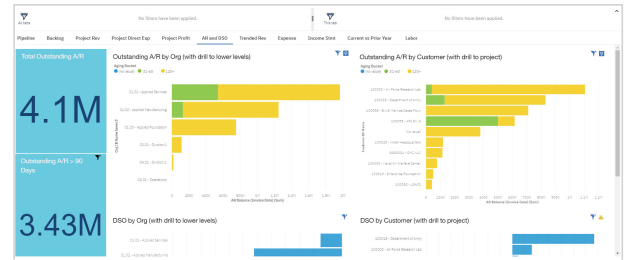
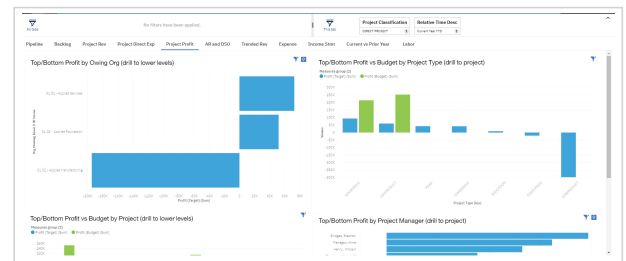
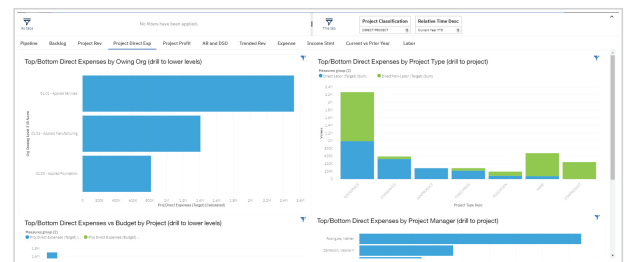
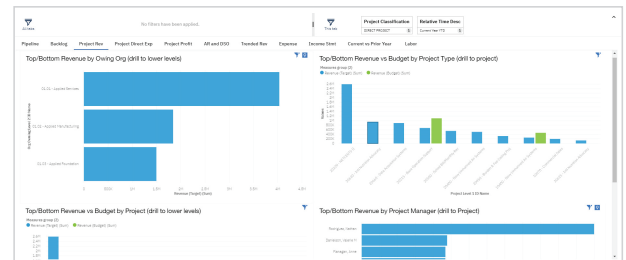
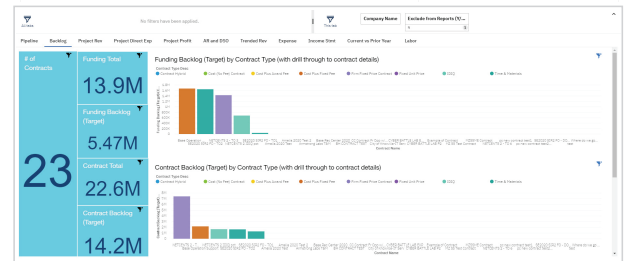
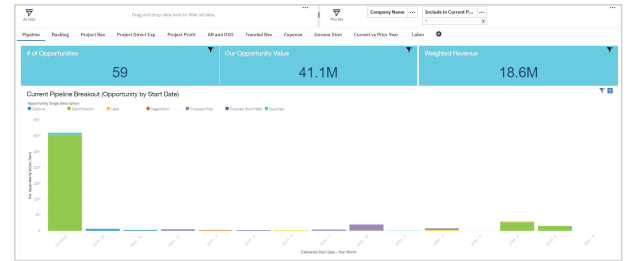
**2. Backlog:** The backlog dashboard is comprised of two bar charts and several widgets driven by the drill through details of the bar charts. The charts contain data for Funding Backlog at Target Rates and Contract Backlog at Target Rates, each chart provides the Backlog summary value by project and then color coded by the specific Contract Type description. The widgets on the left hand side provide the total Number of Contracts, Funding and Contract Total amounts, and Funding Backlog and Contract Backlog amounts at Target Rates. Filters included in this dashboard are for Company Name and Exclude from Reports (Y/N).

**3. Project Rev:** With filters for Project Classification and Relative Time Description, four separate bar charts are provided in the Project Rev dashboard tab. Each chart provides drill down capabilities to lower levels details and will drive the data of the other charts. Top/Bottom Revenue by Owning Organization shows Owning Organization by Revenue at Target Rates. Top/Bottom Revenue vs Budget by Project provides color coded Revenue by Project to show Revenue vs Budget Revenue. Top/Bottom Revenue vs Budget by Project Type shows Revenue by Project and provides color coded Revenue and Budgeted Revenue. Top/Bottom Revenue by Project Manager provides Revenue at Target Rates per Project Manager.

**4. Project Direct Exp:** With filters for Project Classification and Relative Time Description, four separate bar charts are provided in the Project Direct Expense dashboard tab. Each chart provides drill down capabilities to lower levels details and will drive the data of the other charts. Top/Bottom Direct Expenses by Owning Organization shows Owning Organization by Project Direct Expenses at Target Rates. Top/Bottom Direct Expenses by Project Type provides color coded Direct Expense, Labor vs Non Labor, by Project Type. Top/Bottom Direct Expense vs Budget by Project shows Direct Expense by Project and provides color coded Target Expenses vs Budgeted Expenses. Top/Bottom Direct Expenses by Project Manager provides Project Direct Expenses at Target Rates per Project Manager.

**5. Project Profit:** With filters for Project Classification and Relative Time Description, four separate bar charts are provided in the Project Profit dashboard tab. Each chart provides drill down capabilities to lower levels details and will drive the data of the other charts. Top/Bottom Profit by Owning Organization shows Owning Organization by Profit at Target Rates. Top/Bottom Profit by Project Type provides color coded Profit Actual (At Target Rates) vs Profit Budgeted, by Project Type. Top/Bottom Profit vs Budget by Project shows Profit by Project and provides color coded Actual Profit (At Target Rates) vs Budgeted Profit. Top/Bottom Profit by Project Manager provides Profit at Target Rates per Project Manager.

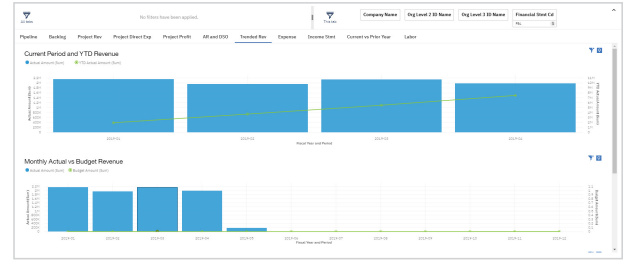
**6. AR and DSO:** The Accounts Receivable and Days Sales Outstanding dashboard tab is comprised of four bar charts and three supported widgets driven by the drill through details of the bar charts. Outstanding A/R by Org provides AR Balance Summary per Second Level Organization with color coding of Aging Status (31-60 Days, 120+ Days, or No Value). Outstanding A/R by Customer provides AR Balance Summary per Customer ID with color coding of Aging Status (31-60 Days, 120+ Days, or No Value). DSO by Org allows a user to view Calculated DSO by Organization Level 2. DSO by Customer shows Calculated DSO by Customer ID and Name. Each Widget on the left hand side provide data that is driven by the bar charts to provide total amounts for Total Outstanding A/R, Outstanding A/R greater than 90 Days, and Overall Days Sales Outstanding.



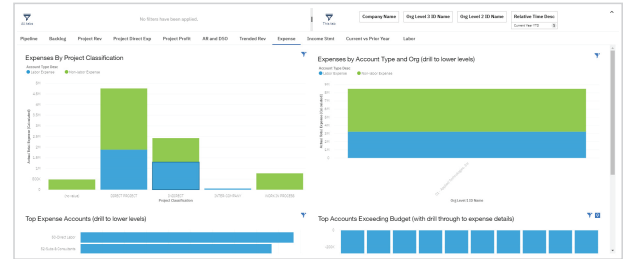
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**7. Trended Rev:** The Trended Revenue tab provides outlook on the Fiscal Year and Period data. Three bar charts provide insight into Actual Amount Revenue. Current Period and YTD Revenue show the Actual Amount vs the Year to Date line. Monthly Actual vs Budget Revenue provides a look into the Actual Amount vs Budgeting Amount on a monthly basis. YTD Actual us Budget Revenue provides YTD Actual Amounts with a line for YTD Budgeted Amounts. Filters applied to this tab are Company Name, Org Level 2 Name, Org Level 3 ID Name, and Financial Statement Code set to P&L.



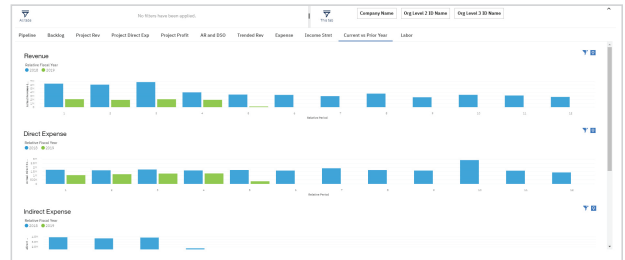
**8. Expense:** Comprised of four bar charts, the Expense tab explores Labor Expenses and Non-Labor Expenses. Each chart provides drill through capabilities to drive the other charts. Expenses by Project Classification provides Calculated Actual Total Expenses by Project Classification and color codes the Account Type Description. Expenses by Account Type and Org shows the Calculated Actual Total Expense by Organization Level 1. Top Expense Accounts shows the Calculated Actual Total Expense by Account ID Level 1. Accounts Exceeding Budget provides Account ID by Total Expense Variance. Filters enabled on this tab are Company Name, Org Level 3 ID Name, Org Level 2 ID Name, and Relative Time Description set to Current Year, Year to Date.



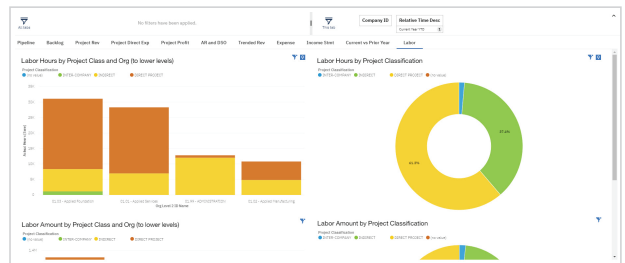
**9. Income Stmt:** The Income Statement tab is created from a Crosstab Report and is viewed as an overall Income Statement by quarter for the current fiscal year, providing line items based on the filtering criteria of Company Name, Org Level 2 ID Name, Org Level 3 ID Name, and Financial Statement Code set to P&L.

	2019-01	2019-02	Summary
	Actual Amount	Budget Amount	Actual Amount
3.1 - Revenue	6,248,262	0	6,248,262
3.2 - Direct Costs	-4,159,803	0	-4,159,803
3.3 - Other Costs	-2,288,616	0	-2,288,616
3.3 - Other Costs	5,712	0	5,712
Summary	-104,860	0	-104,860

**10. Current vs Prior Year:** The Current vs Prior Year tab provides bar charts comparing Prior Year Revenue, Direct Expense, Indirect Expense, and Profit to the Current Fiscal Year Revenue, Direct Expense, Indirect Expense and Profit.



**11. Labor:** The Current vs Prior Year tab provides bar charts comparing Prior Year Revenue, Direct Expense, Indirect Expense, and Profit to the Current Fiscal Year Revenue, Direct Expense, Indirect Expense and Profit.



Use the preconfigured buttons at the top of each dashboard to perform the following functions:



## Filtering

1. Use the preconfigured filters at the top of each dashboard to view the dataset best suited for individual or overall reporting.
2. An object filter is also available on each object to provide further filtering features.



1



## Insights

1. The Insights button, when toggled on, will provide varying relationships and differences presented in the visualization.
2. When hovered over, each insight is presented for the user. The user will also be able to view the insight represented on the dashboard.

2

This object only

**Relative Time Desc**

Includes: Current Year YTD

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All objects

**Financial Stmt Cd**

Includes: P&L