

Deltek Costpoint 8 Business Intelligence Contracts and Opportunities Dashboards



Business Intelligence offers dashboards aimed at providing Contract data in a new and exciting way.

Access: Team Content > Contracts > Dashboards

Contracts Dashboard

The Contracts Dashboard provides consolidated metric views of the Contracts module allowing a user to easily identify the percentage completion of contracts. With 5 tabs to choose varying information, each tab also provides a different view of the calculated percent of completed contracts using a combination of objects, bar charts and list reports to view the data sets needed.

All tabs contain the following preconfigured filters:

Company ID ...	Contract Status Desc ...	Exclude from Report... ...	Missing: Include Ina... ...
		N	1

Use each tab to view the following information:



1. Admin

Within the Admin tab a user will view information on the overall number of contracts per contract administrator. Represented by objects, the number of contracts with Contract ID numbers are identified alongside the Contract Total Value and Funding Total Value. At the bottom of the dashboard a user can view the list report associated with these amounts. One step further, the bar chart shows the Sum of Contract Total Value per Contract Administrator assigned in the Contracts domain and displays them as the Contract Type using various colors.



2. Backlog (Actual)

This tab reveals data associated with the Backlog (Actual) values per Contract ID. The objects for Number of Contracts, Funding Total, and Backlog (Actual) are based on the list report at the bottom of this dashboard. The bar chart provides the calculated Backlog (Actual) amount per Contract Name and also highlights the Contract Type using various colors.



3. Backlog (Target)

This tab reveals data associated with the Backlog (Target) values per Contract ID. The objects for Number of Contracts, Funding Total, and Backlog (Target) are based on the list report at the bottom of this dashboard. The bar chart provides the calculated Backlog (Target) amount per Contract Name and also highlights the Contract Type using various colors.



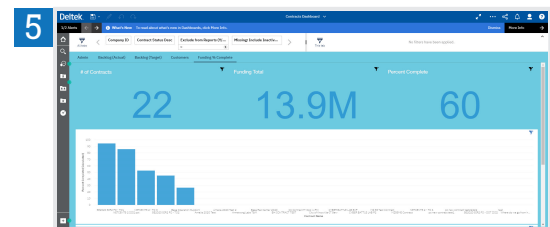
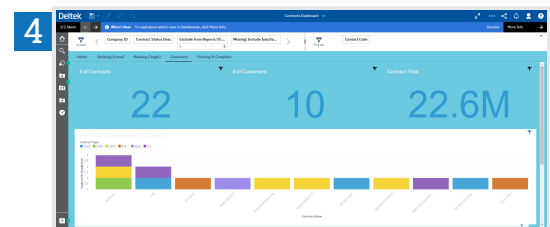
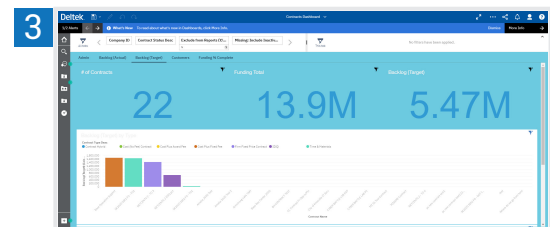
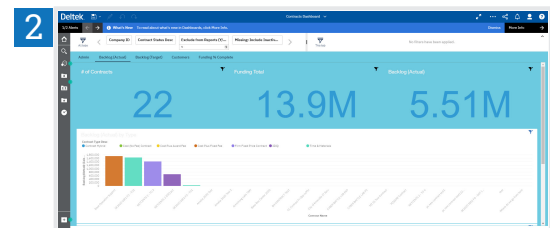
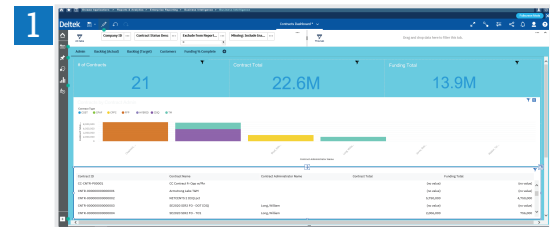
4. Customers

The Customer tab presents objects relating to Number of Contracts, Number of Customers, and Contract Total Value. These numbers are based on the list report at the bottom of the dashboard. The bar chart represents The Number of Distinct Contract IDs per Customer Name and also highlights the Contract Type using various colors.



5. Funding % Complete

Within the Funding % Complete tab a user will find information on the percentage of completed contracts. The objects presented at the top of the dashboard to represent the Number of Contracts, Funding Total, and Percent Complete are based on the list report at the bottom of the dashboard. The bar chart highlights the Percent Complete contracts per Contract Name.



Opportunities Dashboard

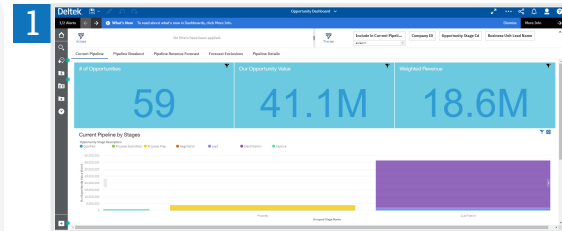
The Opportunity dashboard offers consolidated metric views for the Opportunities module. Here a user will find pipeline information ranging from Current Pipeline data to Forecast Pipeline data throughout each of the 5 tabs available. Each tab has its own set of defined filters and each can be changed using the drop down menus.

Use each tab to view the following information:



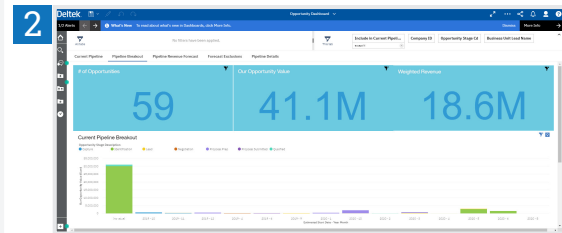
1. Current Pipeline

This tab provides objects and a bar chart based on the list report at the bottom of the dashboard. The objects represent the Number of Opportunities in the Current Pipeline, alongside Our Opportunity Value and the Weighted Revenue of those opportunities. The bar chart is color coordinated by Opportunity State Description and provides Sum of Our Opportunity Value per Opportunity Stage Name. Predefined filters on this tab are Included in Current Pipeline, Company ID, Opportunity Stage Code, and Business Unit Lead Name.



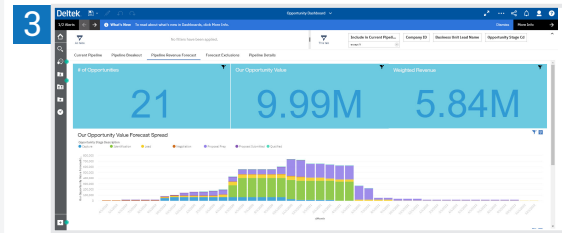
2. Pipeline Breakout

The Pipeline Breakout tab provides objects based on the Number of Opportunities in the Current Pipeline, Our Opportunity Value Total, and the Weighted Revenue of those opportunities based on the list report at the bottom of the dashboard. The bar chart is color coded based on the Opportunity Stage Description and captures the sum of Our Opportunity Value per Estimated Start Date (by Year – Month). Predefined filters on this tab are items that are Included in Current Pipeline, Company ID, Opportunity State Code, and Business Unit Lead Name.



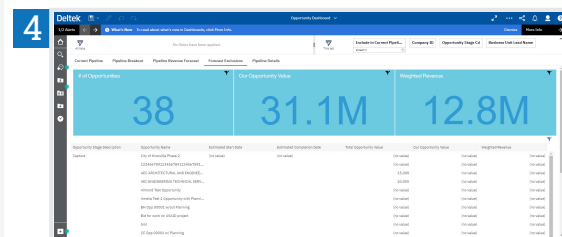
3. Pipeline Revenue Forecast

This tab contains objects and two bar charts providing items representing Forecasted Opportunities in the company pipeline. This data is pulled from the Opportunity Revenue Forecast source. Objects shown here include the Number of Opportunities, Our Opportunity Value derived from the forecasted number of opportunities, and the Weighted Revenue derived from the forecasted number of opportunities. The first bar chart displays Our Opportunity Value Forecast per Month, color coordinated by Opportunity Stage Description. The second bar chart displays the Weighted Revenue Forecast per Month, also color coordinated by Opportunity Stage Description. Predefined filters on this tab are items that are Included in Current Pipeline, Company ID, Opportunity State Code, and Business Unit Lead Name.



4. Forecast Exclusions

On this tab a user can find those Opportunities that have been excluded from the Pipeline Revenue Forecast items that are still in the Capture or Identification Opportunity Stage. The objects identify the Number of Opportunities, Our Opportunity Value and the Weighted Revenue value of those exclusions. A user can also view the list report with details of each of those Opportunities.



5. Pipeline Details

A user can view a list report with all Opportunity Pipeline details in this tab, showing all Stages of Opportunities and the details that have been highlighted in other tabs.

