

Deltek Costpoint 8 Business Intelligence Project Dashboards



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

Access: Team Content > Projects



Organization Manager CP Performance Analytics

The Organization Manager CP Performance Analytics dashboard offers consolidated metric views of Owing Organization. With 7 tabs to choose varying information, each tab also provides preconfigured filters that can be easily changed by the user by using individual drop down menus. Within each dashboard tab, various information can be drilled down to provide even more information to the user.



1. Overview

A year to date analysis populating through the current BI Reporting month. Revenue, Profit and Profit Percentages can be viewed here. Use the pie chart in the middle or the bar chart on the right hand side of the dashboard to control the Revenue, Profit, and Profit % widgets on the left.



2. Current Period Revenue Analysis

Filtered based on the current BI Reporting month and Direct Projects only, this tab shows revenue at target vs budgeted in a bar chart format.

Note: The budgets are budgets stored in Costpoint Project Budgets.



3. ITD Revenue Analysis

Represented as a bar chart, this tab displays the Inception to Date revenue at target vs budgeted.

Note: The budgets are budgets stored in Costpoint Project Budgets.



4. Historical Trends

Filtered based on the previous 12 periods, this line chart provides comparison trends based on organization data.



5. Project Analysis

Utilizing bar charts, the Project Analysis provides a deeper view of revenue by individual Project Manager and the percent completion of their projects.



6. Labor Analysis

Represented as a tree map, Labor Analysis shows the number of hours per level 1 project that have been performed in the current period.



7. Utilization

The Utilization tab provides data by Project Classification, Direct hours, Indirect Hours, Total Hours, and Average Hourly Rate Widgets.





Project Manager CP Performance Analytics

The PM CP Performance Analytics dashboard offers consolidated metric views for the Project Manager, this dashboard is displayed dependent upon enabled security.

- When utilizing the Organization Security feature in Costpoint users will only be able to see projects that are part of their organization.
- When utilizing the Project Manager Security feature in Costpoint, users will only see the projects that they are assigned to as a PM.

This dashboard offers 5 tabs to populate varying information and each tab can be drilled down to provide even more information to the user.



1. Overview

An incurred to date analysis populated using the current BI Reporting month and Direct Projects only, this tab shows Revenue, Profit, and Profit Percentages. It also provides the charts to display the Top 5 Projects and the Bottom 5 Projects.

Note: All rates are based on the Target Rates.



2. Current Period Revenue Analysis

Filtered based on the current BI Reporting month and Direct Projects only, this tab shows revenue at target vs budgeted in a bar chart format.

Note: The budgets are budgets stored in Costpoint Project Budgets.



3. ITD Revenue Analysis

Represented as a bar chart, this tab displays the Inception to Date Revenue at target vs budgeted.

Note: The budgets are budgets stored in Costpoint Project Budgets.



4. Historical Trends

Filtered based on the previous 12 periods, this line chart provides comparison trends based on organization data.



5. Labor Analysis

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