

Deltek Costpoint 8 Business Intelligence Planning Dashboards



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

Access: Team Content > Planning > Dashboards

Org Mgr Planning Performance Analytics

The Org Mgr Planning Performance Analytics Dashboard provides consolidated metric views of the Planning Domain, allowing a user to easily view project performance, utilization, historical trends, and varying analysis. With 8 tabs to choose from, each tab will provide a different data set and filtering options to give the user high level information based on the Owning Organization.



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 individual tab filters, this dashboard reveals two bar charts using current period data based on target rates to show Current Period Budgeted Revenue and Profit vs Current Period Actual Revenue and Profit. Tab specific filters include Level Organizations (Owning), Current Period Flag, and Project Classification Code (Common Inventory, Direct, Inter-Company and Work in Process).



3. ITD Revenue Analysis: Filtered based on individual tab filters, this dashboard reveals two bar charts using current period data based on target rates to show Budgeted Inception to Date Revenue and Profit vs Inception to Date Actual Revenue and Profit. Tab specific filters include Level Organizations (Owning), and Project Classification Code.



4. Historical Trends: Filtered based on the previous 12 periods of date this line chart provides comparison trends for the Current Budgeted vs Actual Trend based on organization data. Tab specific filters include Level Organizations (Owning) and Project Classification Code.



5. Project Analysis: Utilizing bar charts, the Project Analysis provides a deeper view of Current Period Revenue both by Project Manager and by Level 1 Project. Use the Level 1 Project in the % Complete – Largest Projects to provide a smaller result set for the Current Period Revenue by PM. Filters applied to this individual tab are Level Organizations (Owning) and Project Classification Code (Common Inventory, Direct Project, Inter-Company, and Work in Process).



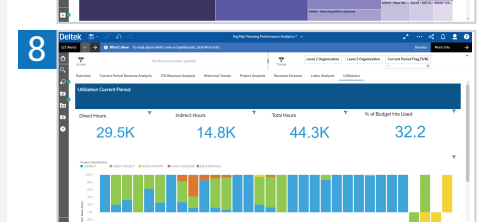
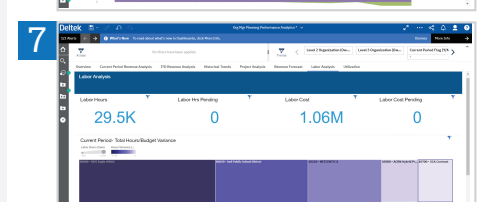
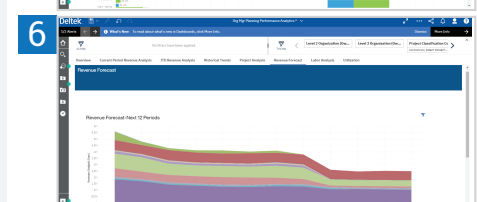
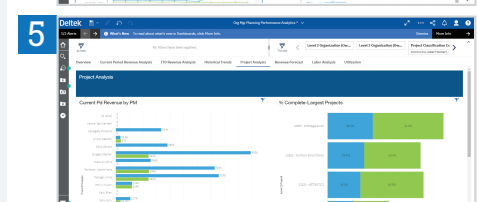
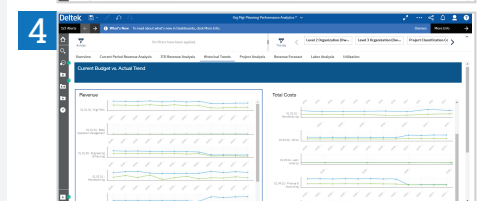
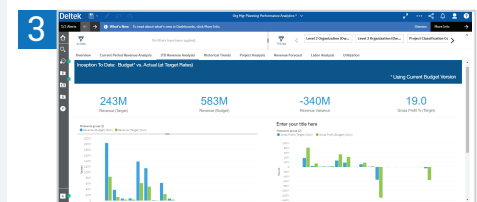
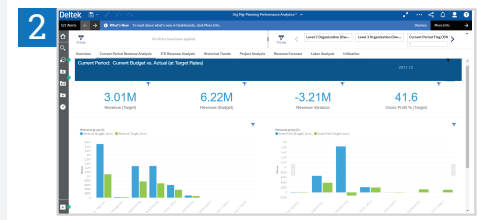
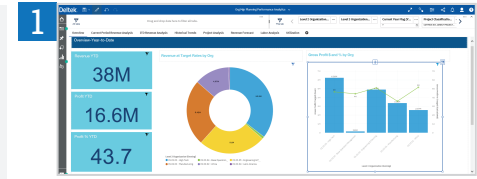
6. Revenue Forecast: This tab provides an area chart to represent the Revenue Forecast over the next 12 periods. Data shown here is color coded by Organization and can be drilled down to get more precise information for each individual Organization. Tab filters provided here are Level Organizations (Owning), Project Classification Code (Common Inventory, Direct Project, Inter-Company, and Work in Process).



7. Labor Analysis: Represented as a tree map, Labor Analysis shows the number of labor hours per current period and the calculated variance to the budgeted hours. The widgets provide total number of Labor Hours, Labor Hours Pending, Labor Cost and Labor Cost Pending for the current period. Tab filters applied are Level Organizations (Owning), Current Period Flag, and Project Classifications (Common Inventory, Direct Project, Inter-Company, and Work in Process).



8. Utilization: The Utilization tab provides a bar chart to show Labor Hours by Organization color coded by Project Classification. The bar chart can be drilled into to drive the widgets at the top of the dashboard containing data for Direct Hours, Indirect Hours, Total Hours, and % of Budget Hours Used. Filters on this tab are applied for Level Organizations and Current Period Flag.



Deltek Costpoint 8 Business Intelligence Planning Dashboards



PM Planning Performance Analytics

The PM Planning Performance Analytics Dashboard provides consolidated metric views of the Planning Domain, allowing a user to easily view project performance, labor utilization, historical trends, and varying analysis from the Project Manager perspective. With 7 tabs to choose from, each tab will provide a different data set and filtering options to give the user high level information based on the Project Manager.

The following filters have been applied for all tabs:

Project Manager

Active Flag


Project Classification Code

- When utilizing the Organization Security feature in Costpoint, users will only see projects that are a 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.

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1. Overview: An incurred to date analysis, this tab shows Revenue, Profit, and Profit Percentages. It also provides a list report to show the Bottom 5 Projects based on profit and a bar chart to show the Top 5 Projects based on profit.
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2. Current Period Revenue Analysis: This dashboard tab reveals two bar charts using current period data based on target rates to show Current Period Budgeted Revenue and Profit vs Current Period Actual Revenue and Profit. Tab specific filters include Current Period Flag.
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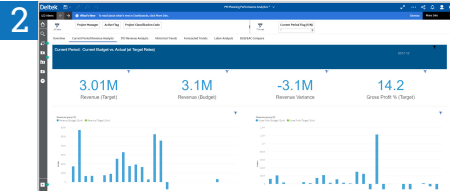
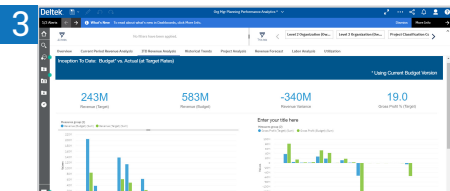
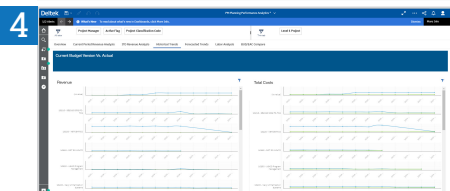
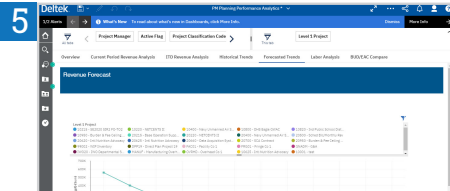
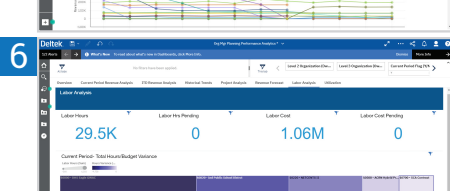
3. ITD Revenue Analysis: This dashboard reveals two bar charts using current period data based on target rates to show Budgeted Inception to Date Revenue and Profit vs Inception to Date Actual Revenue and Profit.
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4. Historical Trends: Filtered based on the Level 1 Project, this line chart provides comparison trends for the Current Budgeted vs Actual Trend based on Project Manager data.
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5. Forecasted Trends : This tab is filtered based on the Level 1 Project and provides a line chart to show the Future 12 Period Trends per Revenue Budgeted. Each Level 1 Project is color coded and shown as a line on the chart.
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6. Labor Analysis: Represented in a bar chart, a user can view the Value of Labor Hours by Level 1 Project. Represented by a tree map, Labor Analysis shows the number of labor hours per current period and the calculated variance to the budgeted hours. The widgets provide total number of Labor Hours, Labor Hours Pending, and Labor Hours Budgeted for the current period. Use the tree chart drill through options to drive the bar chart view.
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7. BUD/EAC Compare : Three different charts can be found in this tab which uses the individual tab filters of Level 1 Project, Budget Type with Version, and Budget Status. A line chart is displayed with Direct Costs by Budget Version. Two bar charts are displayed with Labor Hours by Budget Version and with Direct Non-Labor by Budget Version.

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