

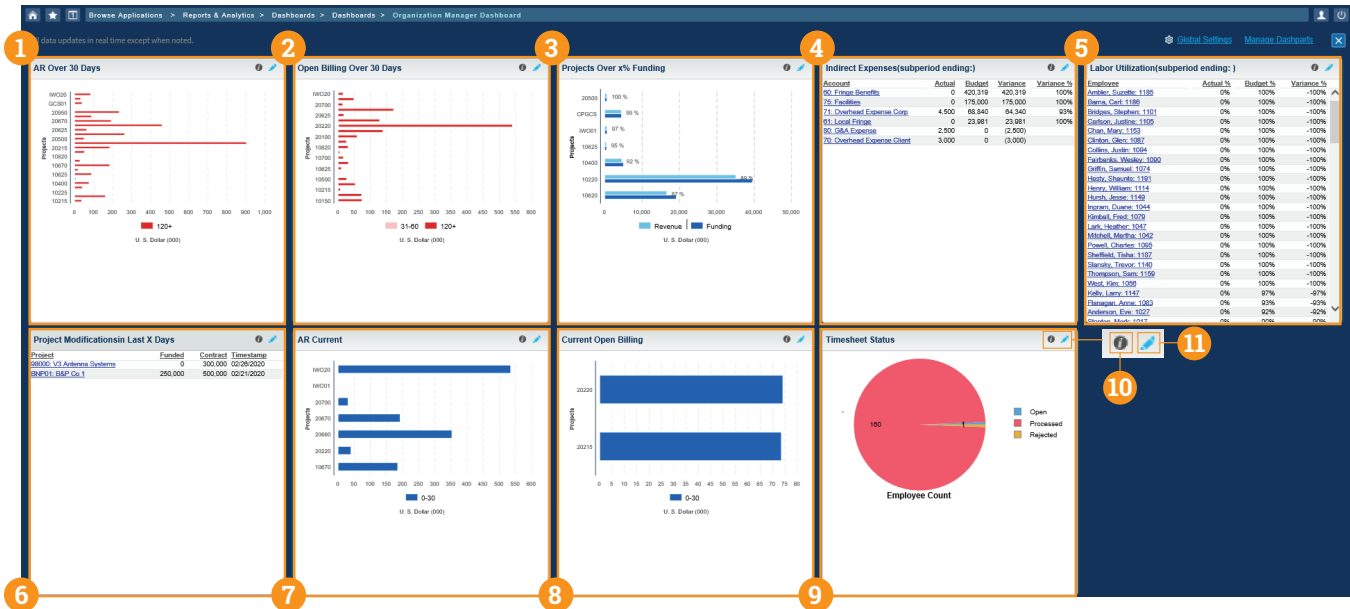
## Organization Manager Dashboard

**Access:** Reports & Analytics > Dashboards > Dashboards > Organization Manager Dashboard

Use the **Organization Manager Dashboard** to display various dashparts designed with high-level information in mind. These Role based dashboards are different from the dashboards in Costpoint BI in that they are not intended to be modified. They serve as an introduction to how dashboards can provide basic information to certain roles within your organization. If you want more flexible and customized dashboards, we encourage leveraging Costpoint BI.



Each dashpart has a drill down capability to bring the user to the designated screen within Costpoint to view more detailed information.



### 1 AR Over 30 Days

Represented as a bar chart, the AR Over 30 Days provides outstanding billed accounts receivables by project over 30 days. Click on any of the bars to navigate to the View Receivables and Collections screen. Use the edit feature to change options for Adjust Current Date by Days, Limit the Number of Projects Displayed on Chart to, and Minimum Amount to Display.

### 2 Open Billing Over 30 Days

Provided as a bar chart, the Open Billing Over 30 Days provides the sum of transactions that have not yet been billed by project, over 30 days. Use the edit feature to change options for Adjust Current Date by Days, Limit the Number of Projects Displayed on Chart to, and Minimum Amount to Display.

### 3 Projects Over x% Funding

Represented as a bar chart, the Projects Over x% Funding dashpart allows a user to view projects with revenue that are approaching a % threshold of the funded value of the contract. Click on any of the bars to navigate to the Manage Modification screen of that project. Use the edit feature to change options for Rate Type, Limit the Number of Projects Displayed on Chart to, Display Projects Approaching Funding %, and Minimum Amount to Display.

### 4 Indirect Expenses

Provided as a numerical table, the Indirect Expenses dashpart allows a user to view indirect non-labor expenses for accounts with actual expenses greater than the budgeted expenses. Hyperlinks clicked link to the Non-Labor Analysis table in the Planning domain. Use the edit feature to change options for Period Type and Budget Type.

### 5 Labor Utilization

Represented as an alphanumeric table, the Labor Utilization dashpart allows a user to drill into the Utilization Analysis details located in the Planning domain by clicking on an employee's name. Use the edit feature to change options for Source Type, Period Type, and Variance Greater Than.

### 6 Project Modifications Last X Days

Represented by a table, the Project Modifications dashpart provides a user with direct links, by clicking on the Project, to the Project Modifications screen within the Projects domain. Use the edit feature to change options for Number of Days.

### 7 AR Current

A bar chart, the AR Current dashpart provides accounts receivables that have been outstanding for 0-30 days by project. Use the edit feature to change options for Adjust Current Date by Days, Limit the Number of Projects Displayed on Chart to, and Minimum Amount to Display.

### 8 Current Open Billing

A bar chart, the Current Open Billing dashpart provides the sum of transactions that have not been billed yet by project for 0-30 days. Use the edit feature to change options for Adjust Current Date by Days, Limit the Number of Projects Displayed on Chart to, and Minimum Amount to Display.

### 9 Timesheet Status

A pie chart is shown to represent Timesheet Status pertaining to a specific approver. Click on a pie piece to drill to the Manage/Approve Timesheets screen in Time and Expense. Use the edit feature to change options for Adjust Current Date by x Days and Period Type.



Located on the right hand side of each dashpart are icons designated for helpful information and editing.

10 Use the icon to view the overall description of each dashpart.

This dashpart displays accounts receivables (AR) that have been outstanding for over 30 days. Each Project is represented by a bar, and each segment of a bar represents the amount of AR balances in a given aging range. Click a segment to open the View Receivables and Collections screen for a Project.

11 Use the icon to view and edit the options for each dashpart, this can include the number of projects to display, amounts to display, or dates to adjust by.

**AR Over 30 Days**

Options

Adjust Current Date by Days  Exclude Amounts Less Than

Limit the Number of Projects Displayed on Chart to