

Management Dashboard

The ERP and other transactional processing systems have created enormous data which every business wishes to utilize for taking better and informed decisions. However the data is very raw and is hardly supportive to decision makers in the form in which it is available. Senior executives spend significant time to make sense out of the data by organizing and reorganizing the data crunched by the ERP reports as well as by other report writers, spreadsheets and other analysis tools. The efforts impact the timeliness of information and also create doubts as to its reliability on account of the manual intervention needed in organizing such data.

What is a Management Dashboard ?

A Business rules based Management Dashboard is designed to quickly assist decision making at all levels in business hierarchy and to enable the decision makers instantly focus attention on exceptions rather than on normal information. Rather than spending time and efforts in compiling and generating information, the decision makers can instantly focus on taking better decisions by using the information on Key Performance Indicators, automatically generated by a Management Dashboard. Once the system is designed and set, the Management Dashboard is directly generated from diverse data sources without manual intervention. Management Dashboard provides uniform view of performance at each level in the organization hierarchy and eliminates ambiguity in evaluating performance.

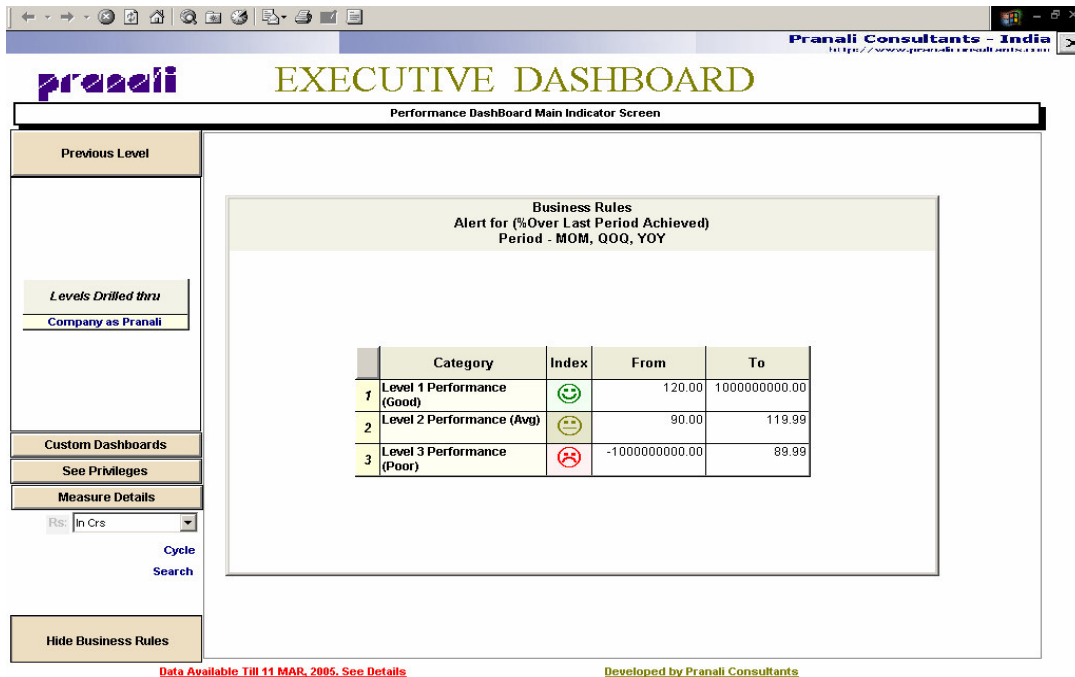


Figure 1 Business Rules for Dashboard Display

The Management Dashboard is designed to display exceptional information on key performance indicators derived from organizational objectives and goals, based on predefined business rules. When the Key Performance Indicators are displayed as columns and the business hierarchies as well as key data dimensions are managed as rows the Management Dashboard can be extended to cover a wide canvass of business users within the organization. Furthermore if the design is handled intelligently such a Dashboard can be used by business partners, franchisees etc., that is decision makers outside the organizational boundaries.

Period over Period Dashboard

As shown in Figure 2 the Management Dashboard is based on data available and on predefined and parameterized Business Rules. A Period over Period (Week, Month, Quarter, Year) comparisons of Volume and Revenue enables users to track business performance, see exceptions and trends and act on information. This dashboard provides information on

- a) **Overall performance** of the level in any business hierarchy
- b) Performance across **Geography, Channels, Products and Customer Categories** depending upon the type of user and the level of access

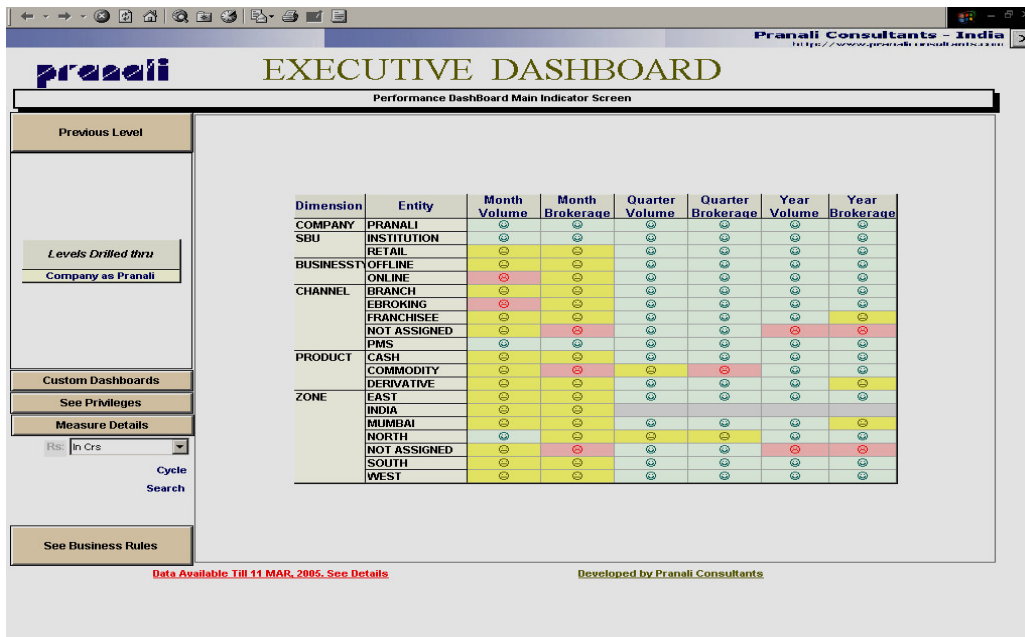


Figure 2 Management Dashboard Indicator Screen

The Management Dashboard displays the Indicator Screen based on the level of user who enters the application. The levels planned in the Management Dashboard are based on the organizational hierarchy which may include MD, Zonal Heads, Product Heads, Channel Heads, Branch Heads etc. The Management Dashboard enables decision makers to click on the indicators to drill down to Trend Screen and further down to Breakup Screens. For Navigation capabilities see the paragraphs below.

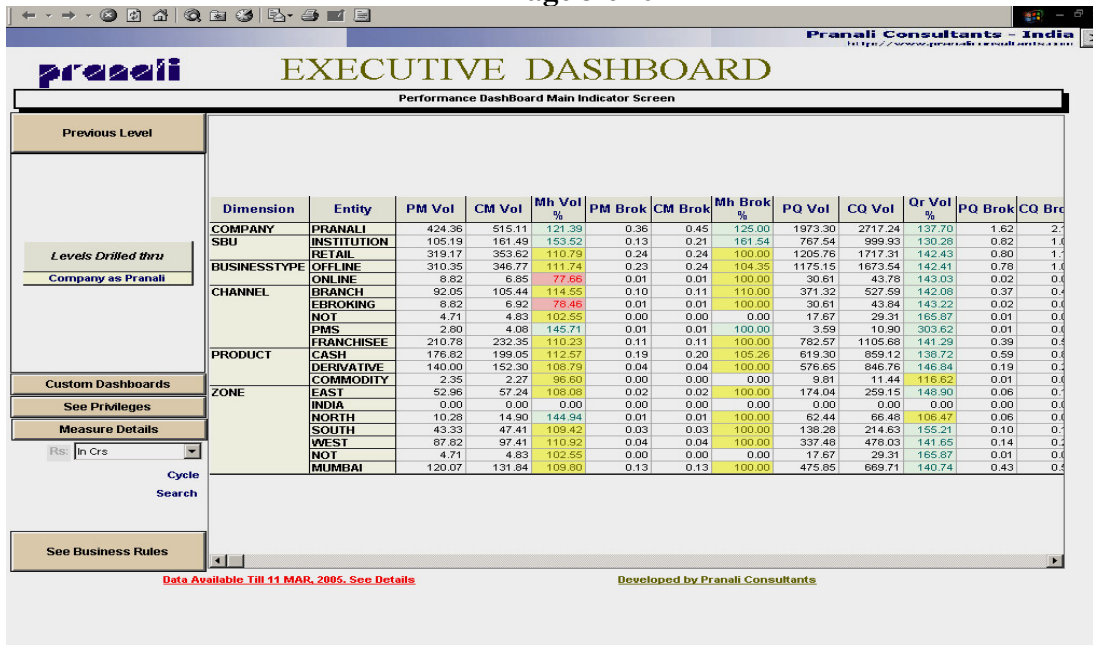


Figure 3 Decision makers can cycle between indicators and the figures behind the indicators so that they may assess business concerns and impact of business indicators.

Levels based on Business Hierarchy

The user at the higher level in business hierarchy is allowed to drill up and down from and to the Indicator Screens of the users at levels below his level. The levels planned in the Management Dashboard are based on the organizational Hierarchy. They could be as follows:

- 1) Managing Director - Full access to all levels (**Level 1 access**)
- 2) Regional Heads – Heads of a Zone (Geographical) who have access to information for their Zone across Channels and Products. (**Level 2 access**)
- 3) Product Heads - Heads of Products who have access to information for their products across Zones and Channels. (**Level 2 Access**)
- 4) Branch Heads – Heads of a Branch (Geographical) who have access to information of their Branch across Products. (**Level 3 access**)

Geographical Levels

Besides drilling down across Business Hierarchy, the Management Dashboard allows drill down to predefined Geographical Entities based on the level of access which could be as follows:

<u>Level</u>	<u>Entity</u>	<u>Filter</u>	<u>Geographical Levels Drill options</u>
Level 1	Company	No Filter/ Zone/ Channel/ Product	States, Cities, Branches, Franchisees.
Level 2	Regional Heads	Zone /Channel/ Product	States, Cities, Branches/Franchisees.

Level 2	Product Heads	Product/Zone/ Channel	States, Cities, Branches/Franchisees.
Level 3	Branch Heads	Branch/ Product	Individual Branch

Management Dashboard - Navigation

Management Dashboard provides two types of navigations:

1) Screen Navigation

Horizontal Navigation by clicking on Indicators: An indicator is the entry point for further information. A decision maker may choose to drill on the indicator of his interest. The trend screen is displayed for the combination of Entity (Row) and KPI (Column) when the decision maker wishes to find out how the particular combination is moving across the time dimension. This insight is very useful in assessing the present status of any indicator. A downward trend with ‘Yellow’ indicator is more alarming than an upward trend with the same ‘Yellow’ indicator.

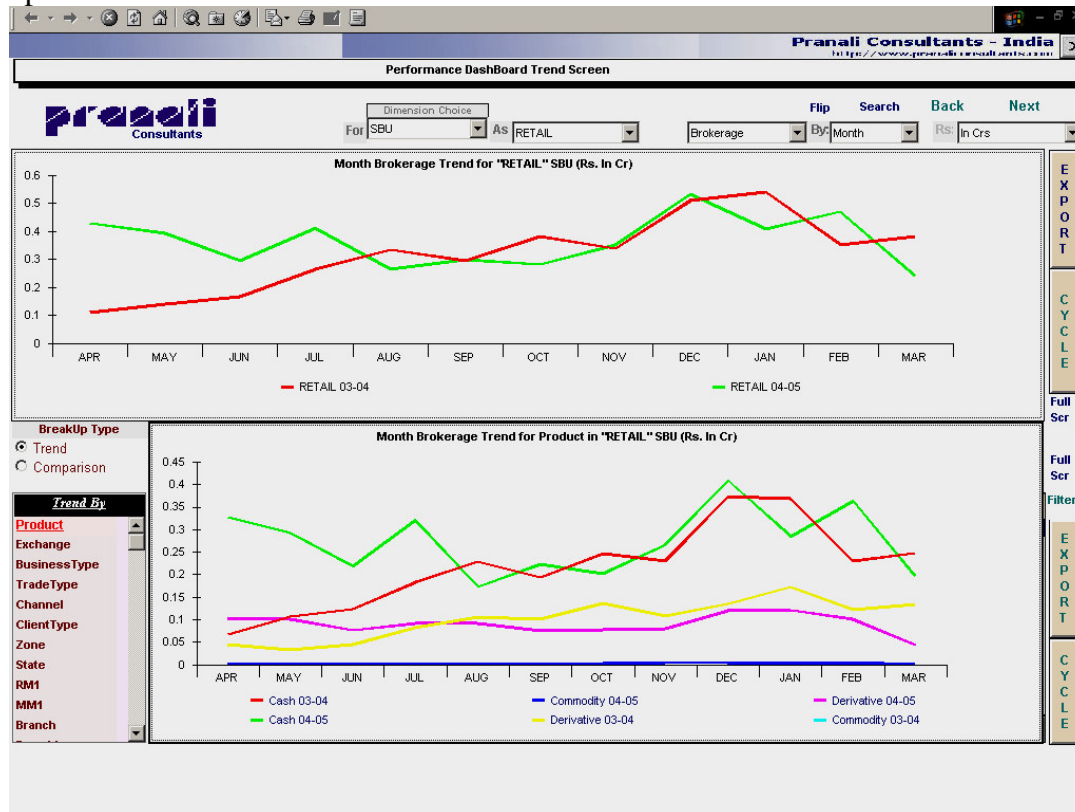


Figure 4 Trend Screen showing Indicator Movement across time dimension

Furthermore the trend screen allows the user to compare the trend for the chosen indicator with the other related trends in the lower stub. This enables the user to find out the reason for the indicator movement across the time dimension. Filters allow selective comparisons and Cycle facility allows toggling between graph and figures.

The Breakup screen is viewed by clicking on ‘Next’ text on right hand corner of the

trend screen. This screen is extremely useful to understand the reasons behind the indicator status. It is used to understand the relative importance of business dimensions and their attributes and to understand how they have contributed to the final indicator status on the indicator screen. Furthermore the Breakup screen effectively shows the indicators for chosen dimension breakup values so that the user may clearly understand what is happening and where.

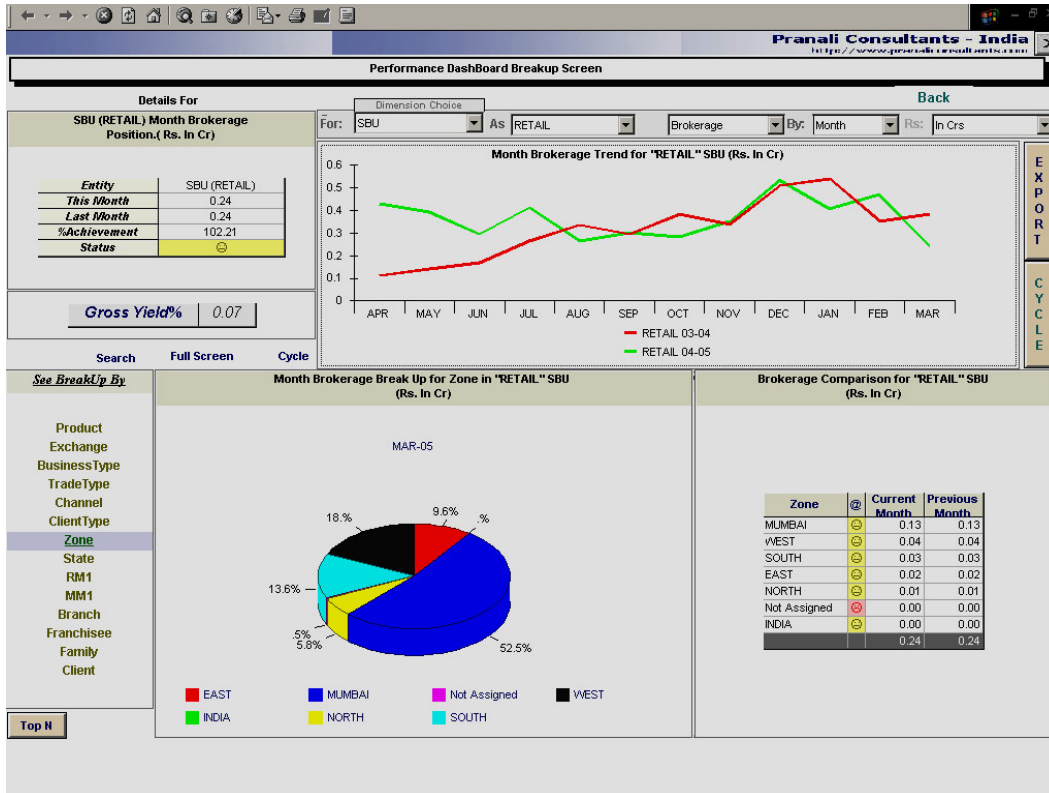


Figure 5 Break Screen for effective analysis of Dashboard indicators

2) Business Hierarchy Navigation

a) Clicked Entity Navigation across drill down paths chosen by clicking on cells (other than first cell) on the Entity column:- The Management Dashboard allows users to navigate to the Dashboards of levels along the business hierarchy. By clicking on the Channel – say Branch, the user can see the Channel Manager’s Dashboard for the Branch channel, by clicking on the Zone – say North, the user can see the Zonal Manager’s dashboard for North Zone and so on. The ‘Previous Level’ box on the left top corner of the screen shows the path along with the user is moving. The user may either drill back or alter his drill path by clicking on any of the cells in this box.

b) Drill Thru Navigation - First Cell on Entity Column

The first cell on the ‘Entity’ column on every indicator screen has special significance. It provides facility of Drill Thru Navigation. The Drill Thru Navigation is essential for every level in Business Hierarchy and is planned as per user’s business needs. For

Page 6 of 6

example even when the Indicator screen provides complete business perspective on KPIs, the MD (or any other user) may want to know what the same indicators look like when viewed across states, cities, branches or franchisees etc. Some of the higher drill thru levels may be eliminated and more levels may be added as one drills down along the business hierarchy.

Conclusion

Management Dashboards as displayed above, which provide critical information in the form of *indicators and drill down capabilities on these indicators*, which have *drill down capabilities synchronizing with the organization structure*, and which have *drill through capabilities* to draw attention to exceptional information from different business perspectives may be effectively deployed **universally** using the WEB architecture. They have very wide applicability and may be used in different business verticals in diverse business functions. Furthermore they can leverage the data from Data Warehouses and OLAP servers and can scale to thousands of users within and outside the organizational boundaries.