

360^o Company Dashboard

Project Specification



Integrated Master in Informatics and Computing Engineering

Information Systems

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1 Project overview

Our project consists of a web application capable of presenting information relevant to a multinational retailing company, like Worten. This information will mostly be extracted from a SAF-T file, with some missing elements, that can not be found in this file, being retrieved from a Primavera database.

The information will be presented in an user-friendly format, using graphs, flow charts and other common statistical representations. Among the information shown by our web application, there will be generic information, showing the general status of the company, sales, purchases, financial, logistics and human resources. We will present this data using drill down functionalities as a way to improve our application.

Lastly, our application will be inter-operable with Primavera Software, so that this information system will serve as a back-end for our project.

2 Functionalities and Features

2.1 Generic Dash

Functionality	Description
Total Sales	KPI that indicates the total value in sales made in the period specified by the user
Purchases Value	KPI that indicates the total value in purchases made in the period specified by the user
Revenue Value	KPI that indicates the total value in revenue made in the period specified by the user
Financial Autonomy	KPI that indicates the financial autonomy value of the company
Inventory Value	KPI that indicates the current value of the inventory kept by the company
Top 5 best selling Categories	Bar graph that shows the most sold categories of products
Sales trend	Line graph that shows the evolution of sales over the time period specified by the user

Table 1: Generic Dash

2.2 Sales Dash

Functionality	Description
Total Sales	KPI that indicates the total value in sales made in the period specified by the user
Backlog Value	KPI that indicates the expected value of the unpaid orders
Sales by Region	Pie chart that shows which regions have had the most sales
Sales trend	Line graph that shows the evolution of sales over the time period specified by the user
Top 5 best selling Categories	Bar graph that shows the most sold categories of products
Sales growth	KPI that indicates sales growth by comparing the sales in the time period specified by the user with the time period of the same length immediately before

Table 2: Sales Dash

2.3 Purchases Dash

Functionality	Description
Total Purchases	KPI that shows the total cost of purchases made by our company in the time period specified by the user
Total Purchase Orders	KPI that shows the total value of purchases still not delivered to our company
Top 5 Suppliers	Bar graph that shows the top suppliers to our company
Top 5 Supplied Categories	Bar graph that shows the top 5 categories of products our company purchases the most

Table 3: Purchases Dash

2.4 Financial Dash

Functionality	Description
Income Value	KPI that indicates the income to the company in the time period specified by the user
Total Expenses	KPI that indicates the total expenses to the company in the time period specified by the user
Total Revenue	KPI that indicates the total revenue to the company in the time period specified by the user
Total Assets Value	KPI that indicates the total value of the assets our company possesses
Accounts Payable	KPI that indicates the total value of debts owed by our company
Accounts Receivable	KPI that indicates the total value of debts owed to our company
Financial Autonomy	KPI that indicates the financial autonomy of our company
General Liquidity	KPI that indicates the general liquidity of our company
Revenue Trend	Line graph that shows the evolution of revenue over the time period specified by the user
Costs Trend	Line graph that shows the evolution of costs over the time period specified by the user
Income Trend	Line graph that shows the evolution of income over the time period specified by the user

Table 4: Financial Dash

2.5 Logistics Dash

Functionality	Description
Inventory Value	KPI that indicates the total value of the inventory our company possesses
Shipments	KPI that indicates the number of shipments in the time period specified by the user
Average Inventory Period	KPI that indicates our company average inventory period
Delivery Status	Pie chart showing the percentage of shipments that arrived out of time
Deliveries by countries	Pie chart showing the percentage of deliveries by country

Table 5: Logistics Dash

2.6 Human Resources Dash

Functionality	Description
Number of employees	KPI that shows the company number of employees
Employees by Gender	Pie chart that shows the gender breakdown of the company employees
Employees by Experience	Pie chart showing the experience breakdown of the company employees
Employees by Workforce	Pie chart showing the employees breakdown by type of work they do
Employees' Satisfaction Trend	Line graph showing company's employees satisfaction trend

Table 6: Human Resources Dash

3 Information Architecture

3.1 Paths

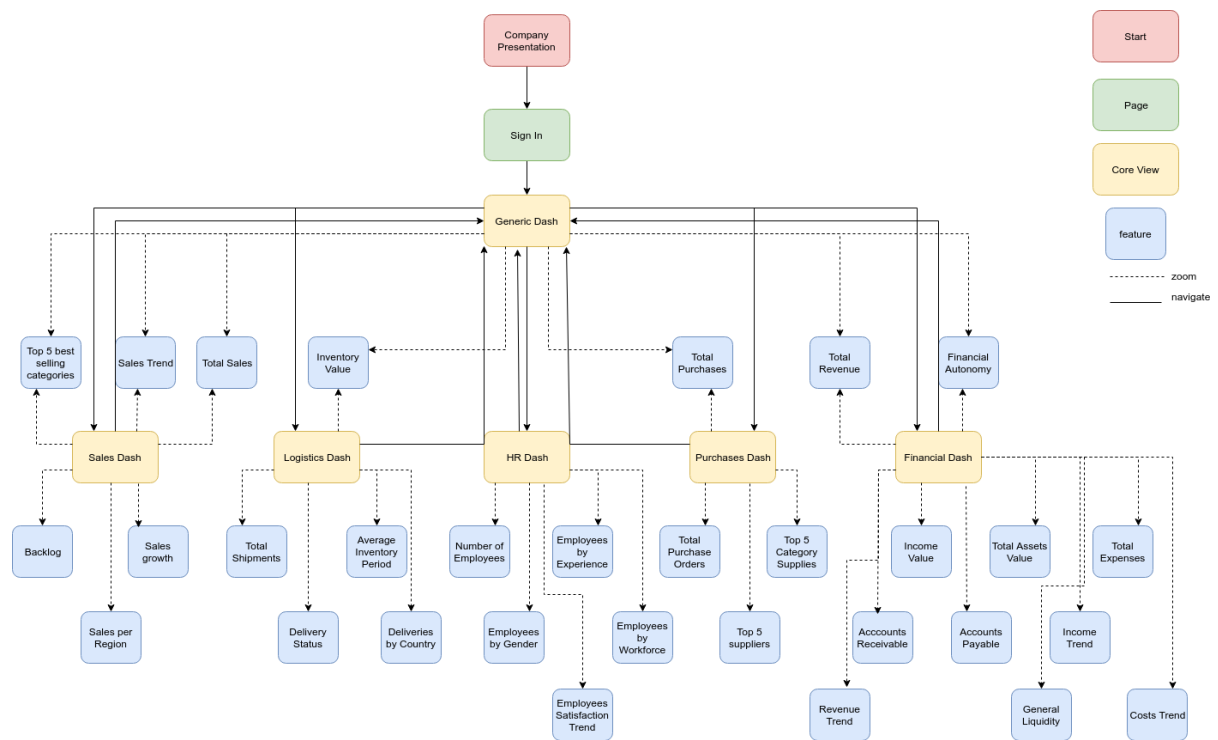


Figure 1: Paths

3.2 Core Views

3.2.1 Generic Dash

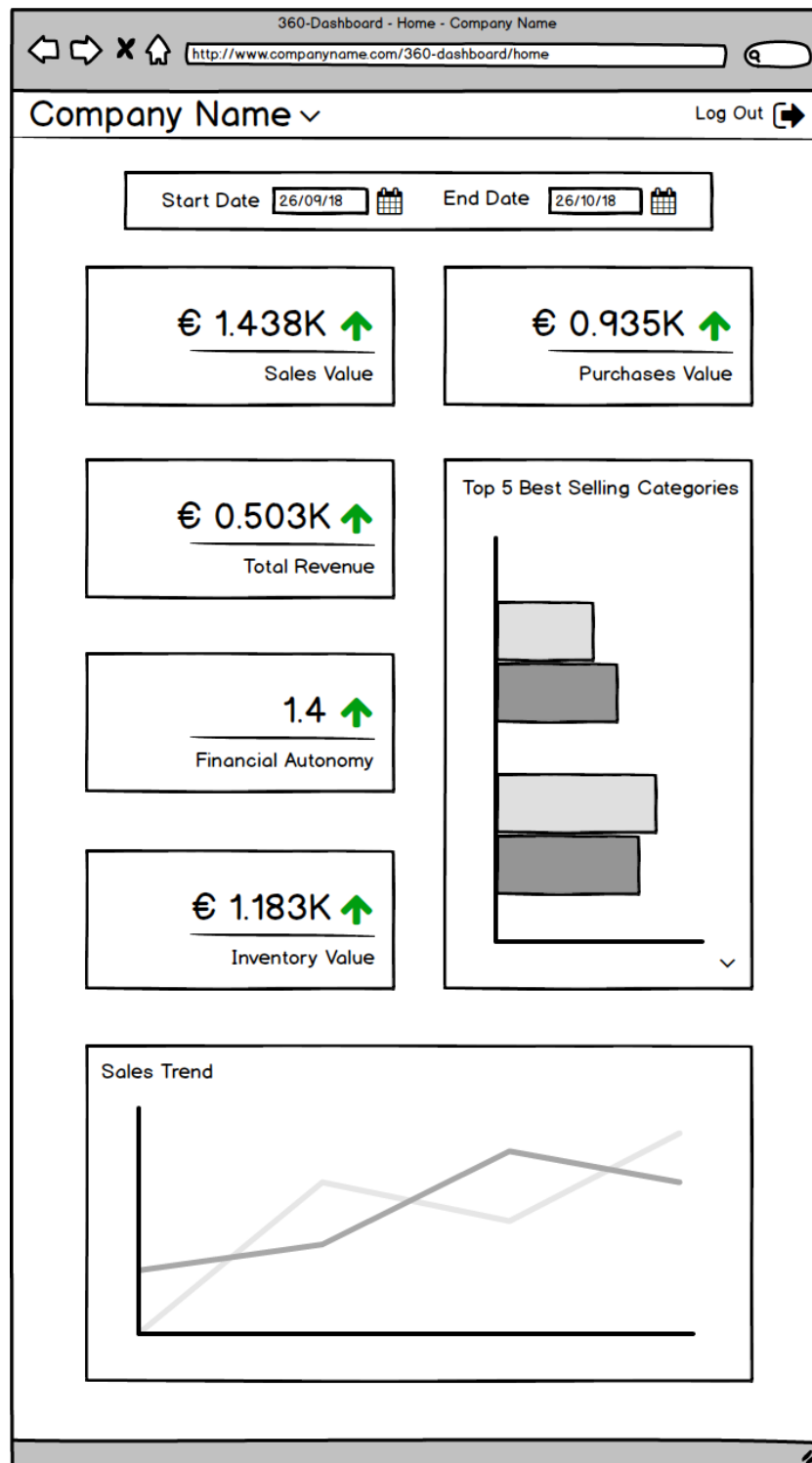


Figure 2: Generic Dash Mockup

User and Business goals

- Company overview (Financial Autonomy, Total Revenue).
- Quickly access company status and important information.
- View to be used as a management tool.

Inward Paths / Trigger Words

- Sign In
- Home Button

Outward Paths / Call to Action

- Sign Out
- Drill down to know more about the different elements of this core

Elements of the Core

- KPI_001 (KPI) | Sales Value
- KPI_002 (KPI) | Purchases Value
- KPI_003 (KPI) | Total Revenue
- KPI_004 (KPI) | Financial Autonomy
- KPI_005 (KPI) | Inventory Value
- BAR_001 (BAR) | Top 5 Best Selling Categories
- LINE_001 (LINE) | Sales Trend

3.2.2 Sales Dash

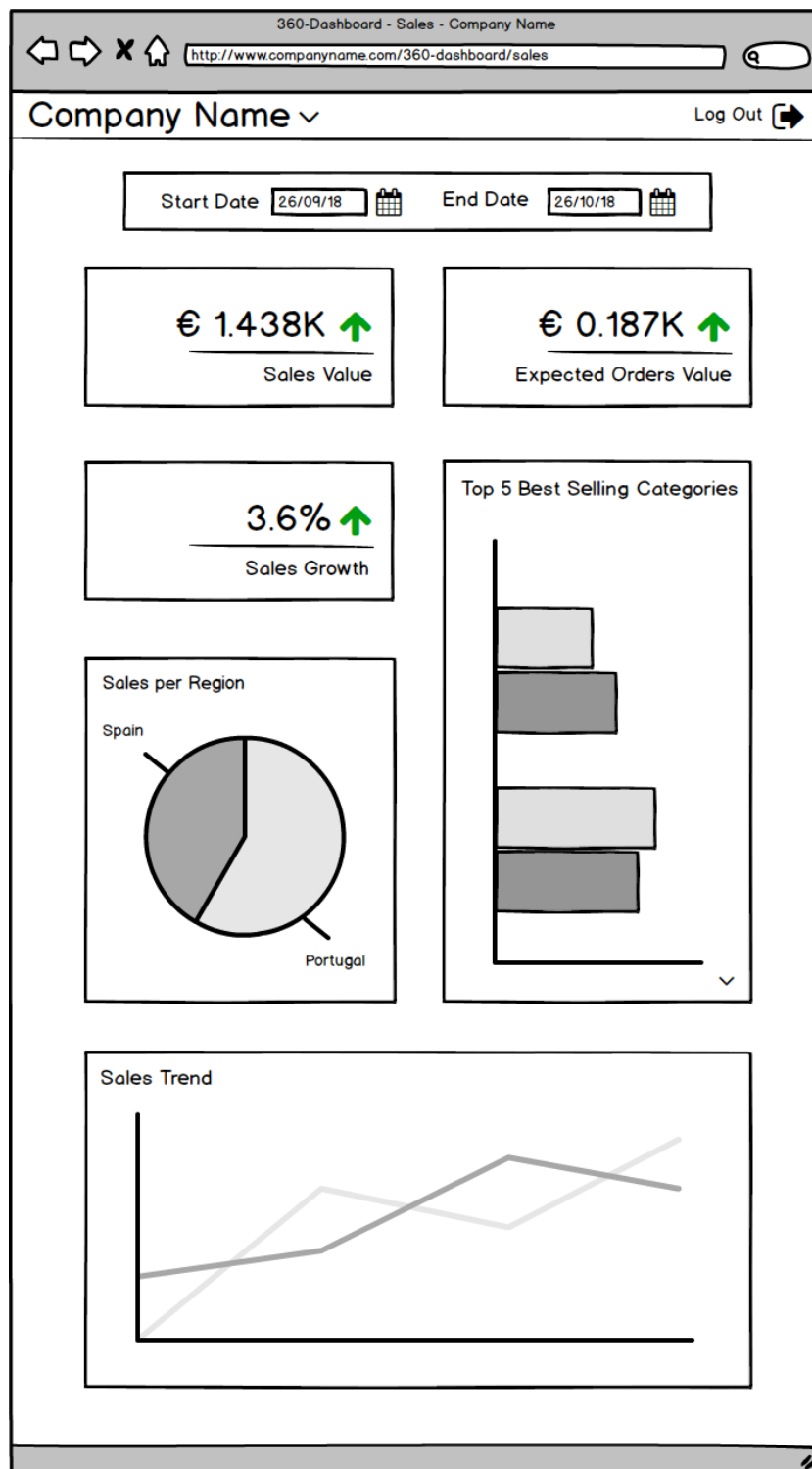


Figure 3: Sales Dash Mockup

User and Business goals

- Company sales overview (Total Sales Value, Sales Growth, Expected Orders Value).
- Quickly access important data about sales status in the company.

Inward Paths / Trigger Words

- Generic Dash

Outward Paths / Call to Action

- Generic Dash
- Drill down to know more about the different elements of this core

Elements of the Core

- KPI_001 (KPI) | Sales Value
- KPI_002 (KPI) | Expected Orders Value
- KPI_003 (KPI) | Sales Growth
- BAR_001 (BAR) | Top 5 Best Selling Categories
- PIE_001 (PIE) | Sales per Region
- LINE_001 (LINE) | Sales Trend

3.2.3 Purchases Dash

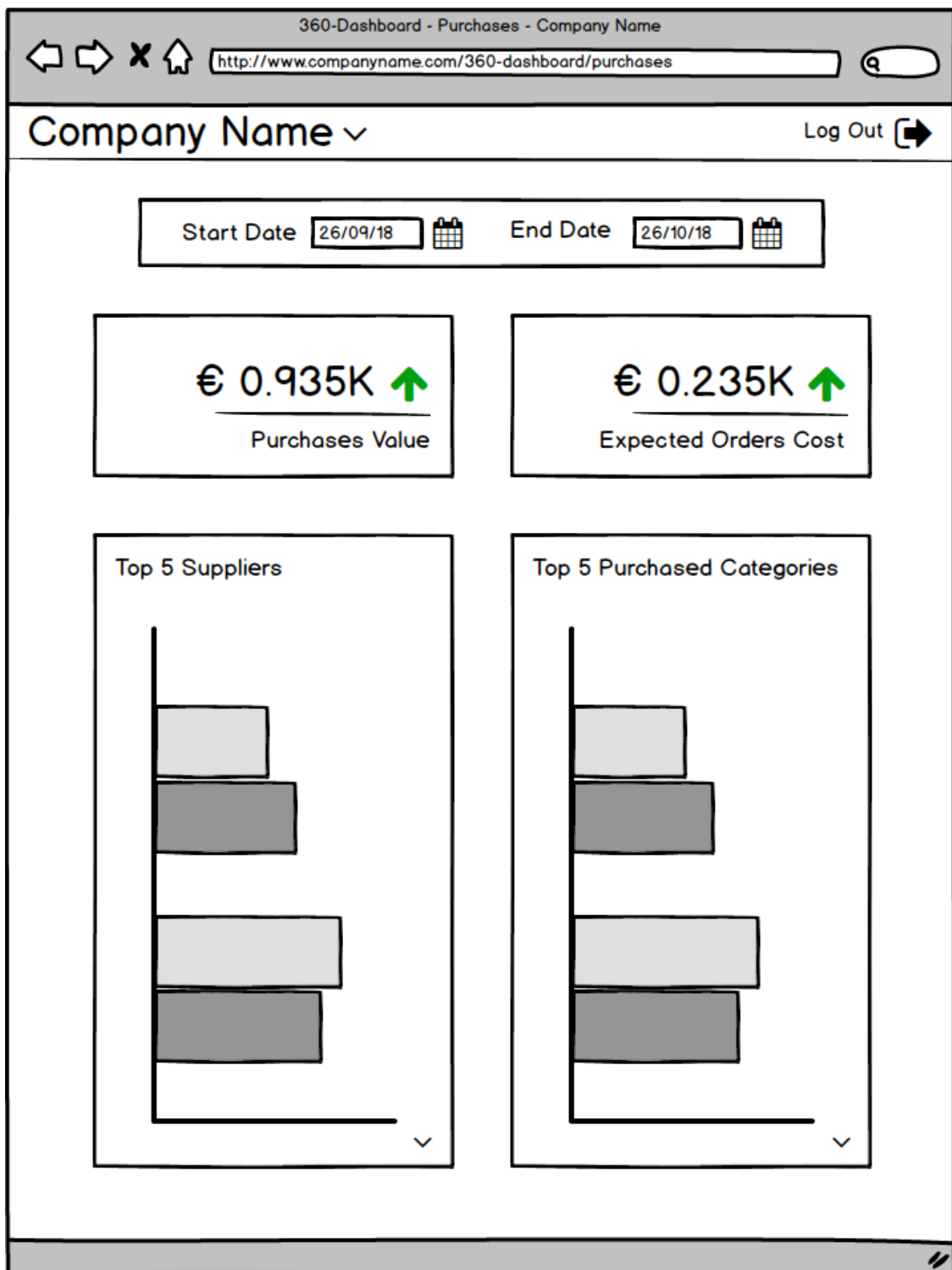


Figure 4: Purchases Dash Mockup

User and Business goals

- Company purchases overview (Total Purchases Value, Expected Orders Cost, Top 5 Purchased Categories).
- Quickly access important data about the purchases made by the company.

Inward Paths / Trigger Words

- Generic Dash

Outward Paths / Call to Action

- Generic Dash
- Drill down to know more about the different elements of this core

Elements of the Core

- KPI_001 (KPI) | Purchases Value
- KPI_002 (KPI) | Expected Orders Cost
- BAR_001 (BAR) | Top 5 Suppliers
- BAR_002 (BAR) | Top 5 Purchased Categories

3.2.4 Financial Dash

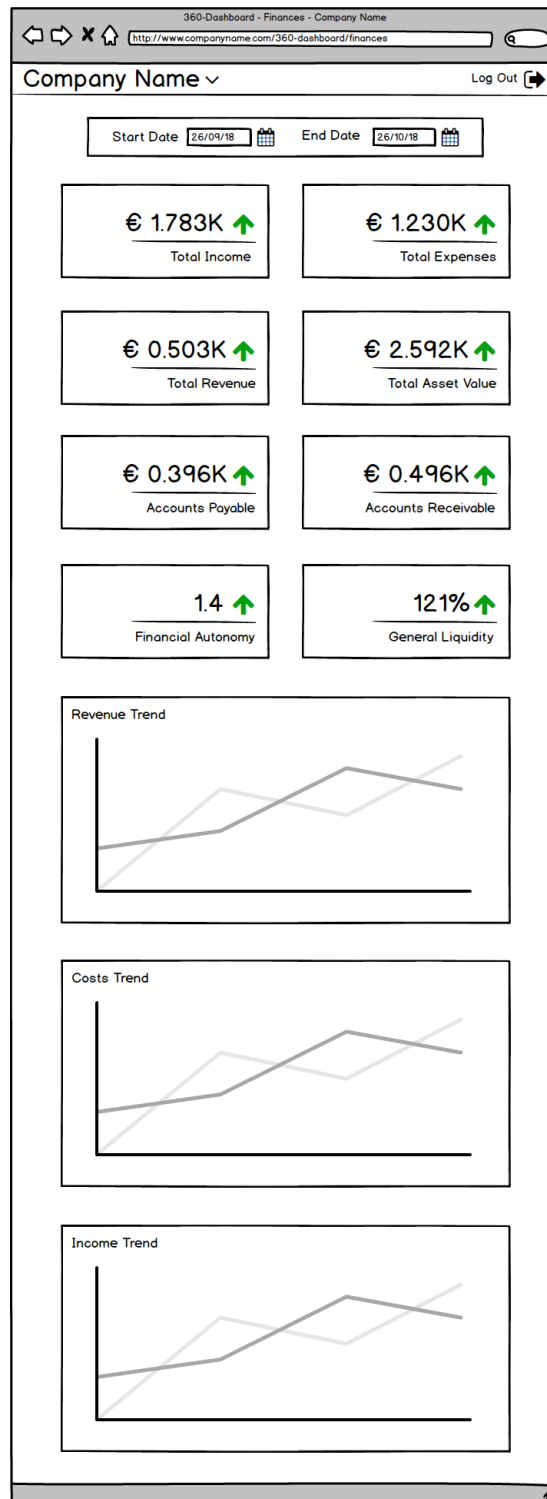


Figure 5: Financial Dash Mockup

User and Business goals

- Company financial overview (Total Income, Total Expenses, Accounts Payable, Accounts Receivable, Total Asset Value).
- Quickly access important data about the financial evolution of the company.

Inward Paths / Trigger Words

- Generic Dash

Outward Paths / Call to Action

- Generic Dash
- Drill down to know more about the different elements of this core

Elements of the Core

- KPI_001 (KPI) | Total Income
- KPI_002 (KPI) | Total Expenses
- KPI_003 (KPI) | Total Revenue
- KPI_004 (KPI) | Total Asset Value
- KPI_005 (KPI) | Accounts Payable
- KPI_006 (KPI) | Accounts Receivable
- KPI_007 (KPI) | Financial Autonomy
- KPI_008 (KPI) | General Liquidity
- LINE_001 (LINE) | Revenue Trend
- LINE_002 (LINE) | Costs Trend
- LINE_003 (LINE) | Income Trend

3.2.5 Logistics Dash

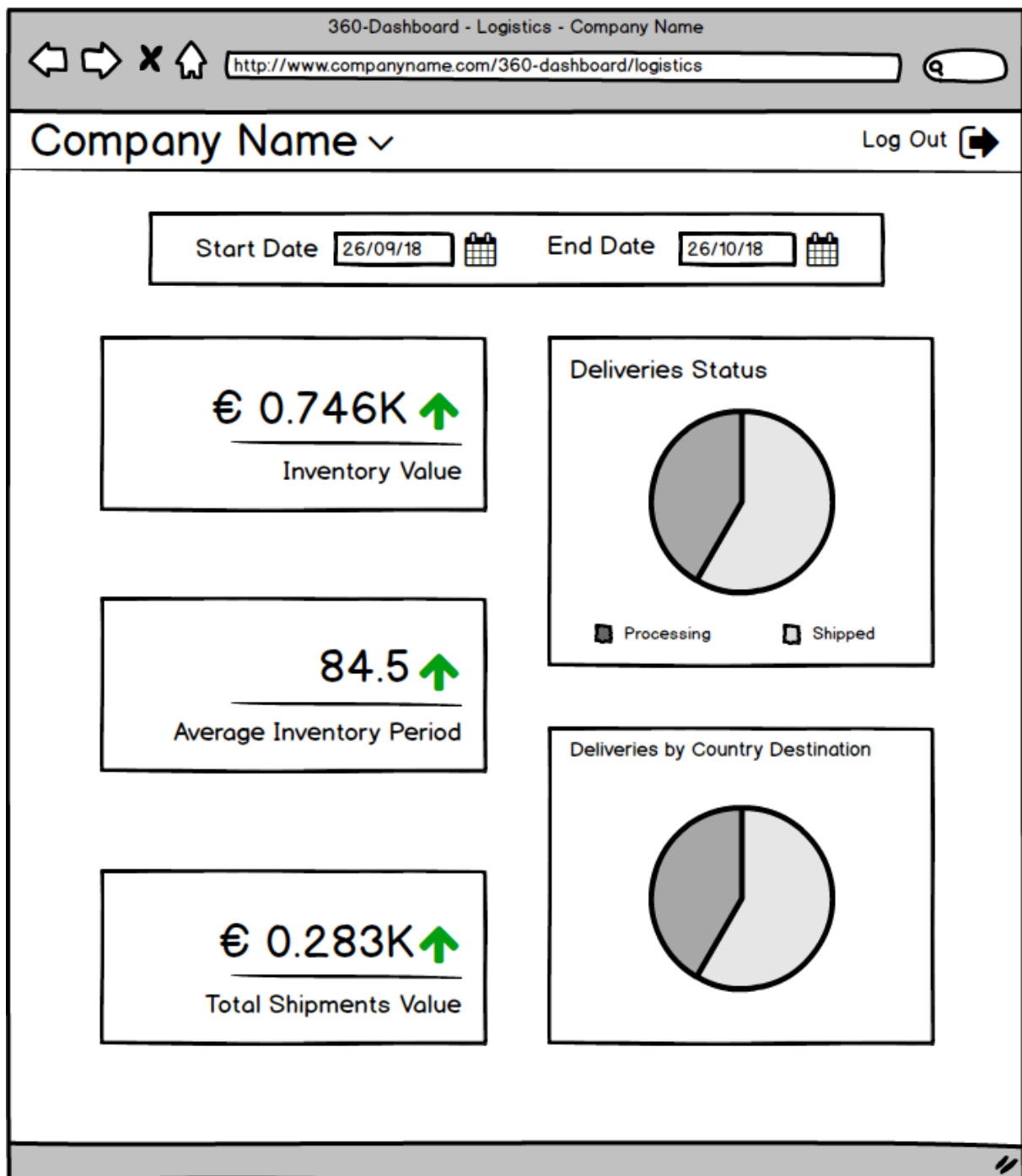


Figure 6: Logistics Dash Mockup

User and Business goals

- Company logistics overview (Inventory Value, Average Inventory Period, Delivery Status).
- Quickly access important data about the company's inventory and shipments.

Inward Paths / Trigger Words

- Generic Dash

Outward Paths / Call to Action

- Generic Dash
- Drill down to know more about the different elements of this core

Elements of the Core

- KPI_001 (KPI) | Inventory Value
- KPI_002 (KPI) | Average Inventory Period
- KPI_003 (KPI) | Total Shipments Value
- PIE_001 (PIE) | Deliveries Status
- PIE_002 (PIE) | Deliveries by Country Destination

3.2.6 HR Dash

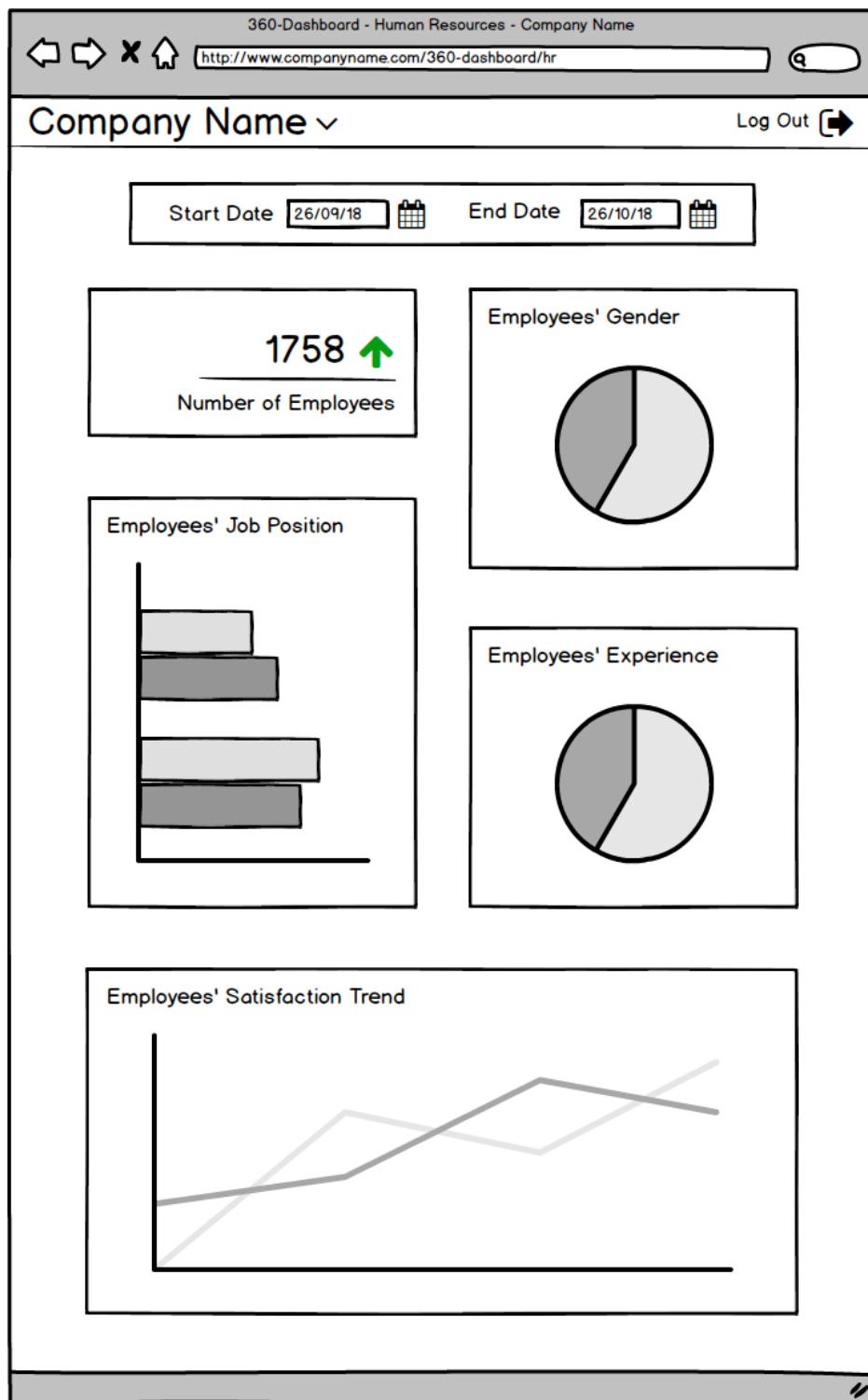


Figure 7: HR Dash Mockup

User and Business goals

- Company human resources overview (Number of Employees, Employees' Experience, Employees' Satisfaction).
- Quickly access important data about the company's workforce.

Inward Paths / Trigger Words

- Generic Dash

Outward Paths / Call to Action

- Generic Dash
- Drill down to know more about the different elements of this core

Elements of the Core

- KPI_001 (KPI) | Number of Employees
- PIE_001 (PIE) | Employees' Gender
- PIE_002 (PIE) | Employees' Experience
- BAR_001 (BAR) | Employees' Job Position
- LINE_001 (LINE) | Employees' Satisfaction Trend

4 Planning

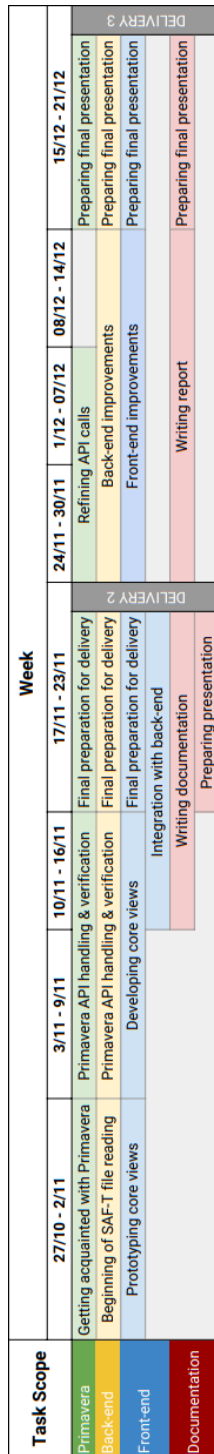


Figure 8: Gantt chart