# Financial Health Scorecard Dashboard

Project Objectives

1. Create an interactive and comprehensive dashboard to list data to both restaurant owners and corporate business analysts. This data is designed to give insights into data anomalies detected through information provided from a business database.

1. Import, clean, and format data in various ways that allow the integration into a PowerBI dashboard.

1. Create a database that is scalable, and able to be manipulated to add new data, should it become available.

Challenges with Team

1. Understanding personal roles and expectations for the project

2. Using new software

    a. Azure

    b. PowerBI
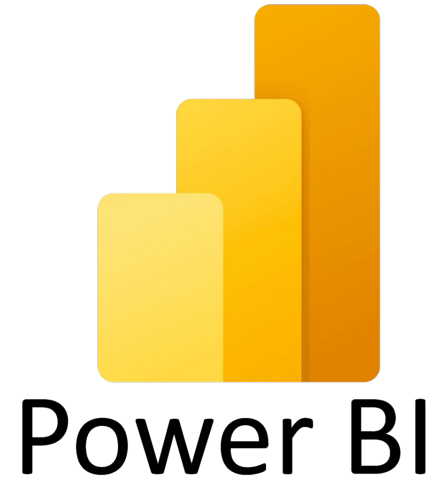
Challenges with Data

1. Data importing
   a. Null Values
   b. Negative Store ID's
   c. Duplicate Account ID's
   d. Unwanted Extra Columns
2. Failed conversions during "Type Alterations"
3. Dependencies were created that challenged process of deleting unnecessary values

Results   Messages

	FranID	StoreID ▲	FiscalYearID	CalendarID	AccountID	Amount
1	2318	-90001192	2024	9	10270	44917.291900
2	2117	-90001171	2024	8	10200	-853059.704000
3	2302	-90001134	2024	4	470	31194.539600
4	2302	-90001134	2024	7	10030	-23073.239000

Challenges with Design

1. Coming to a unanimous decision on which application to build our dashboard in. These challenges arose from differences in operating systems, if we wanted to use a paid or a free application, etc.
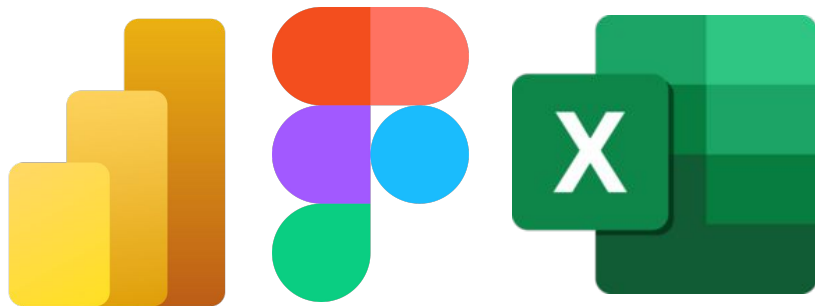
2. Understanding the process of converting the raw data into new and cleaned tables fit for importing into the dashboard.

| to → from ↓	DATETIME	FLOAT	DECIMAL	INT	BIT	NVARCHAR	VARCHAR
DATETIME		X	X	X	X	√	√
FLOAT	√		√	√	√	√	√
DECIMAL	√	√		√	√	√	√
INT	√	√	√		√	√	√
BIT	√	√	√	√		√	√
NVARCHAR	√	√	√	√	√		√
VARCHAR	√	√	√	√	√	√	

Prototype 1

- First initial prototype, submitted with project proposal.

- Hand drawn outline of the different features we would need. Very high level, just meant to be proof of concept.
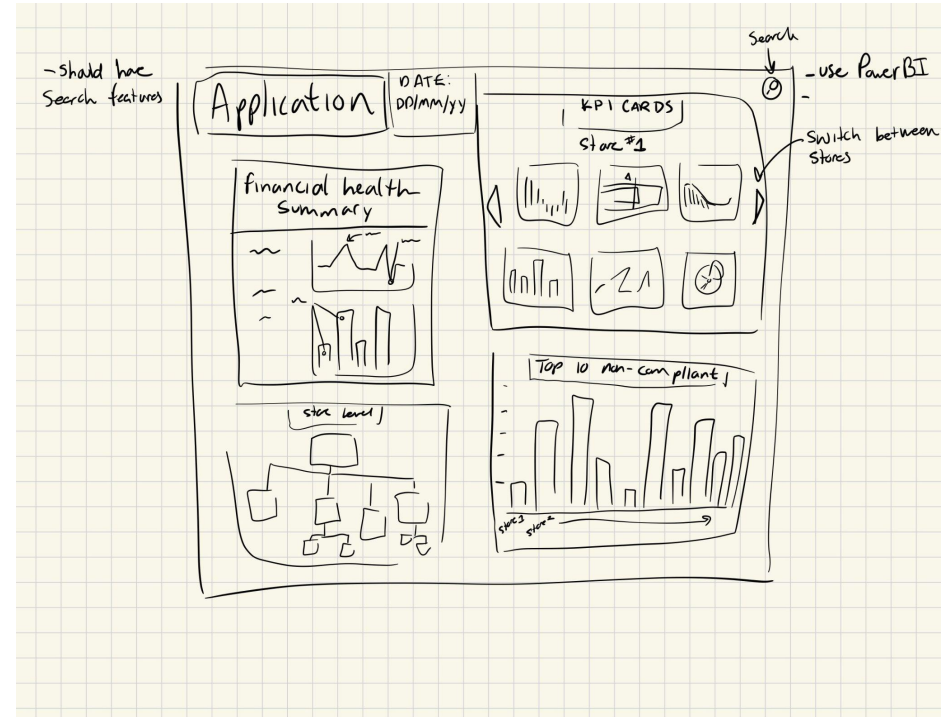
Prototype 2

- Submitted with project prototype documentation, created in figma and helped us shape the design that eventually became out final dashboard.

- Also very high level, but shows a much more detailed picture of what to include.
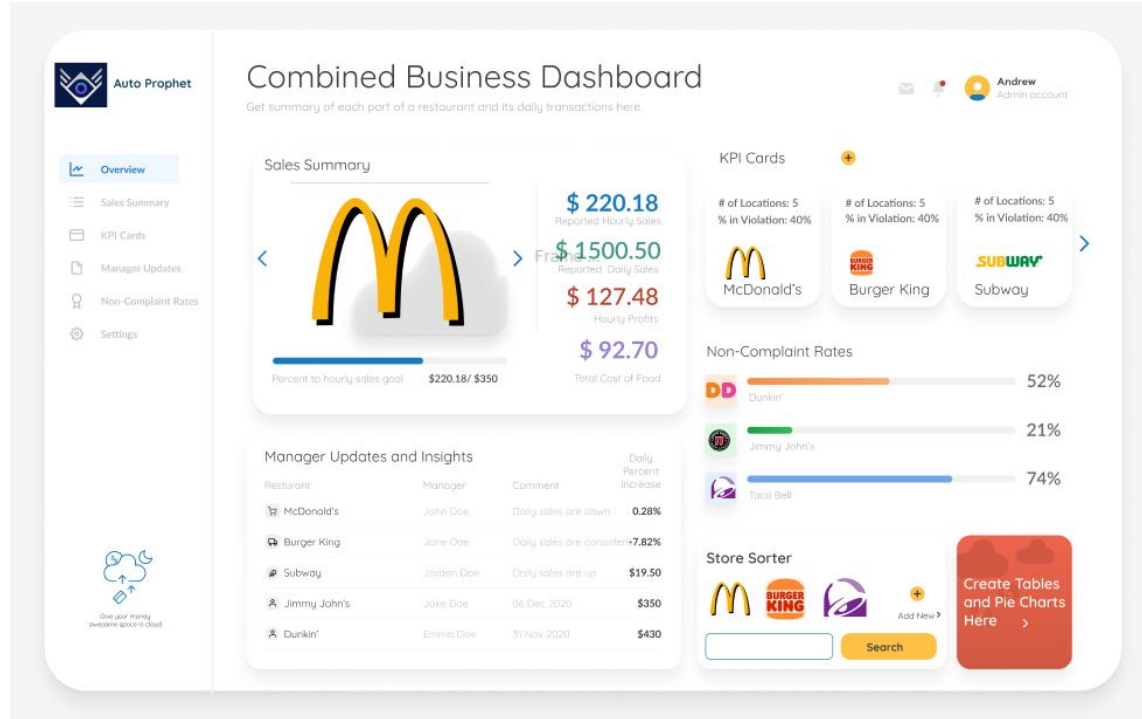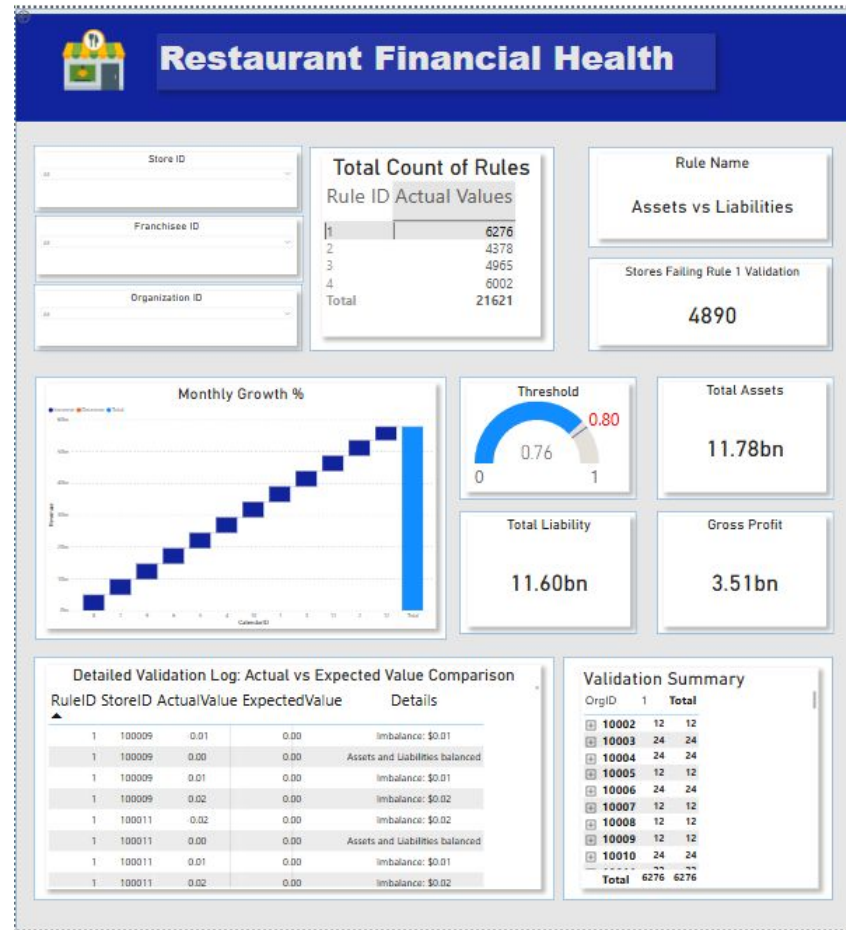
Prototype 3

- Created in PowerBI, served as the template for our final dashboard.

- Empty, and lacking data from the tables, but has all the modules in place that helped us build out information as we needed.
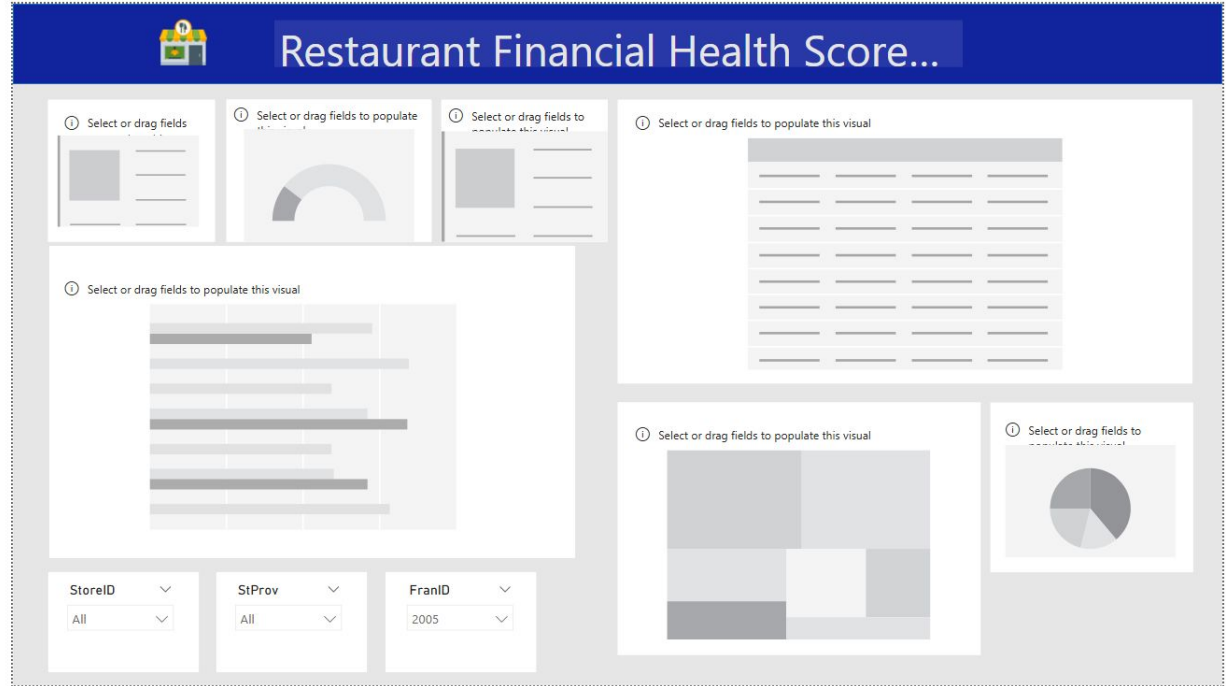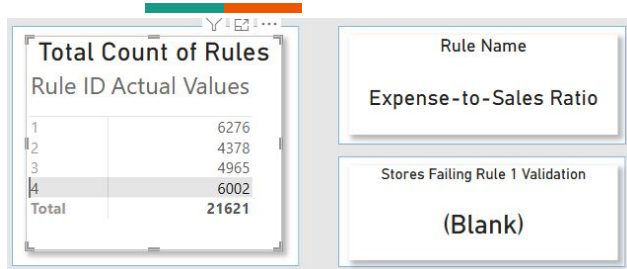
Final Product Design

- Simple, minimalist dashboard showing various information necessary to the end user.

- Information displayed can be changed by selecting the different rules.
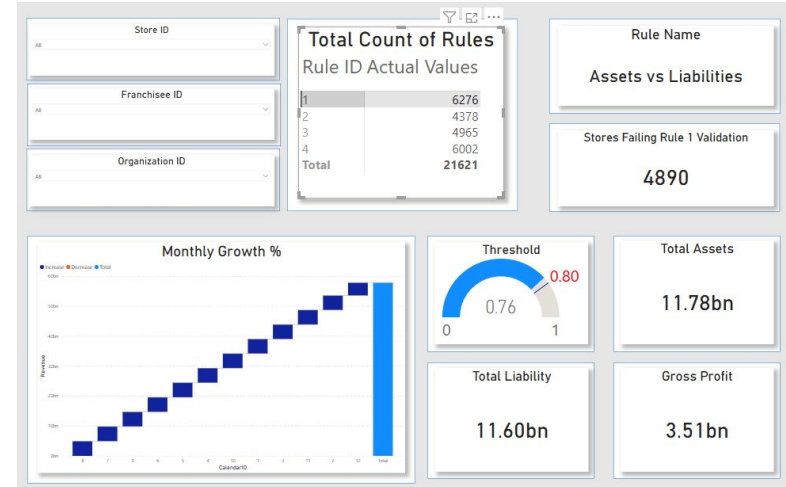
Final Product Features

Selecting the different rules updates the different values on the table.

← Rule 4, Shows the ratio of money being spent vs money coming in. Shows the health ratios, and how well each store is doing.

^ Rules 1, shows the assets to liabilities. How much money the store has vs how much it owes, or how much its gonna be required to pay.
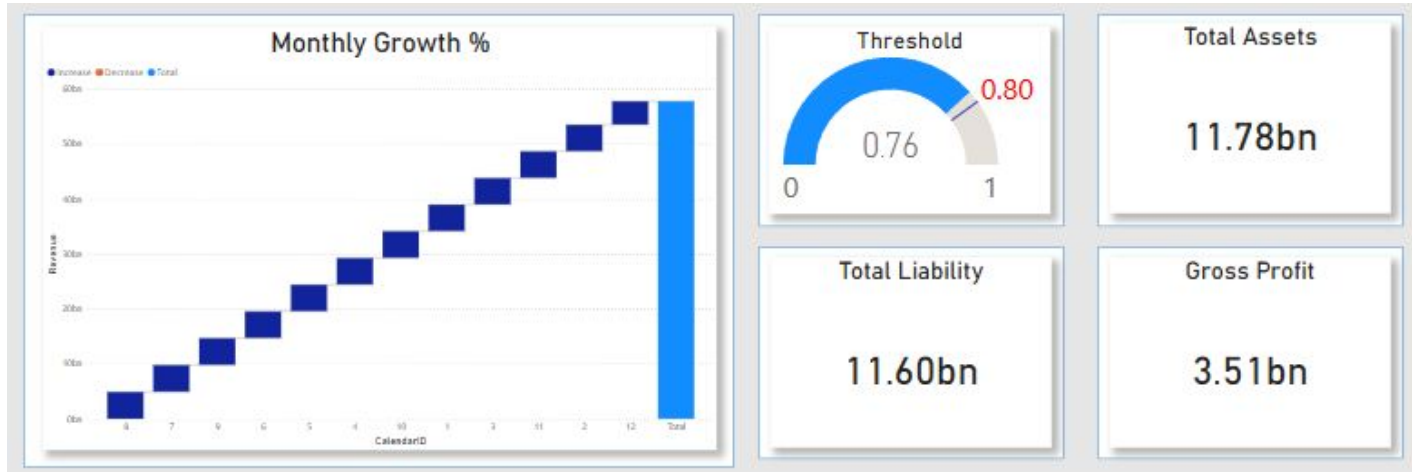
Final Product Features

- Selecting different Store IDs updates the dashboard to display all information pertaining to the selected store.
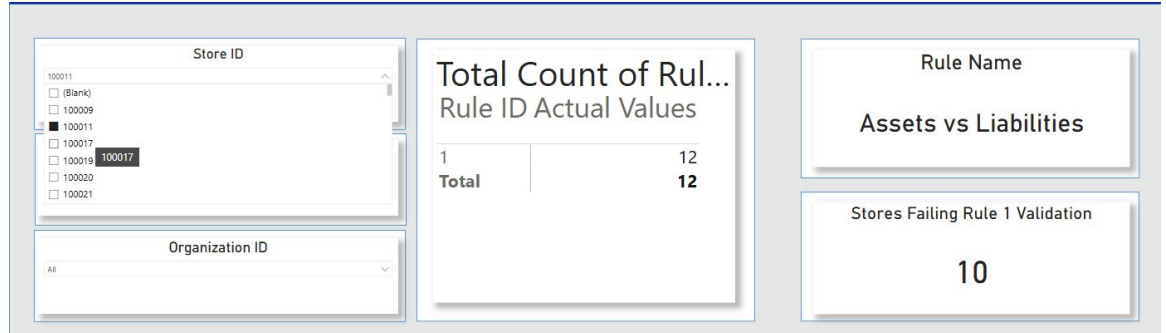
- The same sorting methods can be used with Organization ID, and Franchisee ID.

Final Product Statistics

The dashboard is able to display many different statistics based on each store. These include:

- Monthly revenue growth percentages
- Expense to income ratio
- Total assets, liabilities, and gross profits.

Product Demonstration

Opportunities for Future Releases

- Integrate AI-driven insights and natural language Q&A

- Enhance mobile and offline accessibility

- Implement real-time streaming and automated data refresh

- Leverage predictive analytics and machine learning models

- Adopt advanced custom visuals and UX enhancements

- Enable cross-platform embedding (Teams, SharePoint, apps)

- Strengthen data governance, security, and compliance