Account Statistics

Created by Joel Nave, last modified on Apr 02, 2016

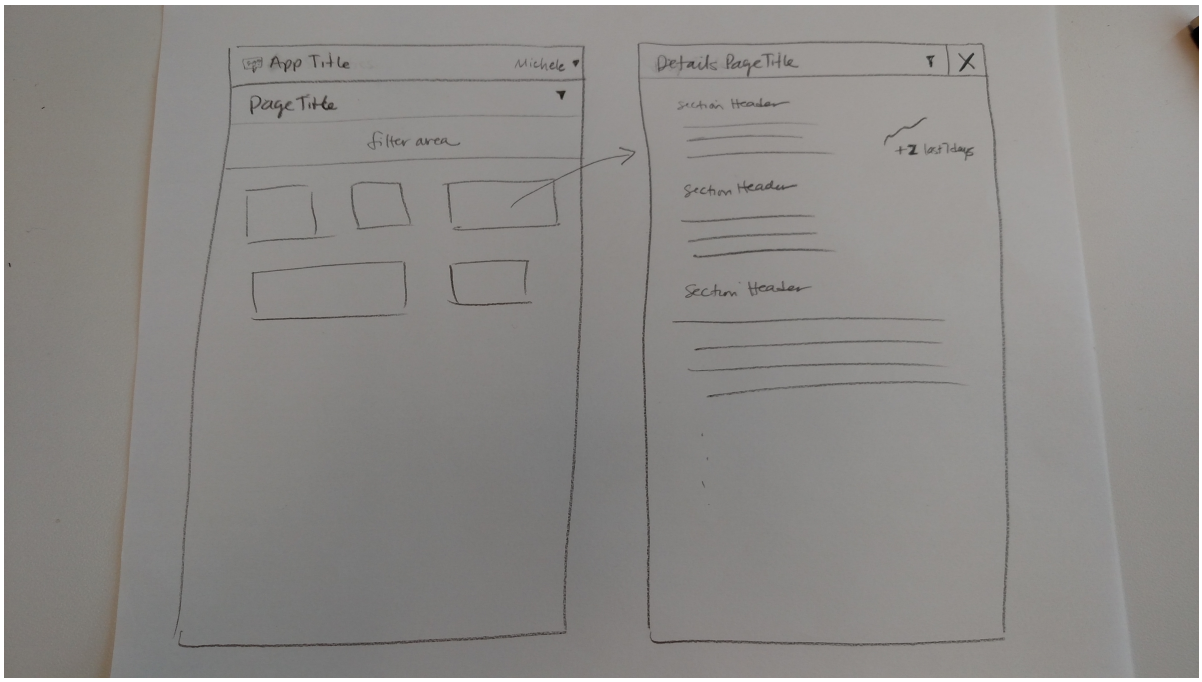
Overview

The Account Statistics application will provide Paradata employees statistical information about Projects (Product BOMs) from Paradata SaaS. It will provide these statistics across all accounts, for a specific account, and even for a specific Project (BOM) based on user defined filters. Account Statistics will break down analysis into multiple "reports". At some point in time these will be interactive pages allowing our Data Analysts to take action on certain parts of the data. For the first release they will be view only. The categories will be:

- Key Performance Indicators
- Cost Analysis
- Risk Analysis
- Compliance Analysis
- Lead Time Analysis
- Supplier Analysis (future)
- Usage Analysis (future)

The Account Statistics application will provide a dashboard that displays key statistics that users will want to review on a regular basis. From the Dashboard users will be able to drill into more detailed statistics.

Navigation Flow (drill from Dashboard to detailed Reports)



The Report Details page will display as follows:

- A full page sheet. The Global Navigation Bar will not be displayed.
- The user will click on an "X", or close icon to return to the Dashboard.
- The Title Bar that contains both the report title and the "x" icon will be pinned and will not scroll with the page. This will allow the user quickly close the page without having to scroll back to the top of the page.

Data

As stated above, all of the data within this application will be related to accounts and account projects. Additionally users will want to see stats 'as of' a particular date. Here are some key concepts that the data will need to support for the desired statistical analysis.

Meaningful Data

Users will want to review meaningful customer account statistics. This means...

Test Data - Test data must be filtered out by default.

Archived Projects - Archived project data must be filtered out by default (except for the Billing Report)

Project Versions - The most recent version of a project will typically be used to generate statistics (min, max, current average, change last 7 days). However, some statistics will come from the very first version of the project ("Initial" measures). If someone manually reruns an old version we will not update stats based on that.

- "Initial" data refers to the first version of the project when it was first uploaded (even if the latest/current version is not the first version).

Project States - Projects that are in states not visible to the user should be filtered out (e.g. projects that failed during upload).

Time-based Data

- Users will want to analyze and compare data from initial states to current states to see the progress or change of the data.
- Data will need to be snapshot / recorded each day so that time-based statistics can be generated.

The user will want to filter the data based on an account or project.

- See Filter

Dashboard

The Dashboard will be made up of a number of KPI "cards". Users can drill to more detail by clicking on the card.

- Dashboard Design

Drill Down Reports (Analysis Sheets)

General Requirements

Rounding

Metrics and measures shall be presented in a human friendly way. A maximum of 3 digits will be displayed for a key metric, therefore it must be rounded properly.

Common Measures

The following measures will be common for these statistics

Initial Average = The average of the values for the projects that meet the filter criteria, from the time when the first version of the project was first uploaded (on the project creation date, the values from the initial upload). Note the data will change within a version, so it is not just the data from the first version.

Current Value = The value as of now (the latest project version, which could still be from the first version). Only use values from the most recent version of the project, don't count values from multiple versions.

Current Average = Sum of all values for all projects / total number of projects. Note the number of projects vary based on the filters (account, projects, and date).

High Value = The highest value across all the projects applicable to the filters.

Low Value = The lowest value across all the projects applicable to the filters.

Note: The High and Low values will not necessarily come from the same project (unless filtered to 1 project).

Change Last 7 Days = The difference between the current average and the current average from 7 days ago. This is to get a trend of if the number is going up, down, or staying the same.

- In the event that the snapshot data from 7 days ago is not available, gather the data from the next closest day (try 6th day, then 8th day, then 5th day, then 9th day, etc).
- TBD: UI should indicate if the change last 7 days data is not from 7 days ago. Might be tricky if the data is across multiple projects and some are from varying days.

Displaying Data Columns

When the user filters down to a single specific Project, High/Max and Low/Min columns are not applicable and should not be displayed.

Original Requirements

Project Analysis

To get to this report the user can click on the following Dashboard cards:

- Active Projects

Page layout:

- Project Counts (with link to Billing Info) and Count Over Time
- Bill of Materials
- BOM Health
- Risks
- Issues

Part Analysis

To get to this report the user can click on the following Dashboard cards:

- Data Completeness
- Sourcing Breakdown
- (future) Top Manufacturers
- (future) Top Suppliers

Page layout:

- Data Completeness
- (future) Unique Manufacturers
- (future) Unique Suppliers
- Item Sourcing Status
- Mfr Part Sourcing Status

Cost Analysis

To get to this report the user can click on the following Dashboard cards:

- Cost Savings
- Spend Throughput

Page layout:

- Cost Savings

Processing Time Analysis

To get to this report the user can click on the following Dashboard cards:

- Platform Processing Time
- BOM Processing Time

Page layout:

- Platform Processing Time
- BOM Processing Time

User Analysis

To get to this report the user can click on the following Dashboard cards:

- Users

Page layout:

- User Analysis Page
    - Total Users (count)
    - User Logins
    - Never Logged In

Key Statistics
- Filter all below by All, By Account, By Project
- Filter out “Test” account data
- Filter out archived projects

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- Total Number of Projects (and versions)
- Total Estmated Cost (unit and extended)
- Potential Savings Total (unit $, ext $, %)
- Avg. Health Score (total and by component)
- Item Coverage / MFR Part Coverage (count and %)
  - With breakdown by enrichment status
  - With initial vs requests with follow-on enrichment
- Harvest Request Cycle Time
- # of users created
- # of user sign ins

Manufacturers
- Most common manufacturer
- Highest enrichment rate by manufacturer
- Lowest enrichment rate by manufacturer
- Manufacturer sources count
- $ amount by manufacturer

Filter Epic
* Persist across sessions
* Default All
Filter User Stories
* Filter by Accounts (excluding Test Accounts)
* Filter by Projects (excluding Archived Projects) - driven/filtered by Accounts
* Filter by Date Ranges
** Options: All Time, Past Week, Past 30 Days, Past 90 Days
* Option to include Test Accounts
* Option to include Archived Projects
Projects User Stories: Generally, Average, High, Low is only applicable when >1 project. Future: compare against all or all in this account.
* Total Projects, Total Versions, Average Versions per Project
* Health Grade grid (Overall, 3 components - Average, High, Low)
* Pricing Totals
** Total Paradata Costs (Unit and Extended - Average, High, Low)
** Total customer costs (Unit and Extended - Average, High, Low)
** Potential Savings (Unit, Extended, % - Average, High, Low)
* BOM Breakdown (Enriched, Matched, Custom, Sourcing/Not Found)
** Current Average, High, Low # and %
** Initial Average, High, Low # and %

The spreadsheet attached includes sample data for the various key statistics.

Usage Statistics.numbers

Things I would like to know:
User Sessions

- List of users who have not signed in
- How many users signed in within a given time period
- What was the average session time (session mean, shortest session, longest session)
- User login counts ordered by most sessions to fewest sessions
- Customer login counts ordered by most to fewest

Projects

- Total # of projects created (total and within a given time period)
- Count by user
- Count by customer
- Average versions per project

BOMs

- Item counts - total, average, smallest, largest
- MFR Part counts - total average, smallest largest
- AML - avg MFR Parts per Item (only include items with at least one MFR Part)
- Breakdown of data integrity issues (how many by type, avg per bom)
- Breakdown of supply risks (how many by type, avg per bom)
- Avg levels per BOM
- Avg locations per BOM
- Eventually break these down by part category, mfr

Sourcing

- BOM Breakdown
- Parts identified as custom
    - Avg % of custom parts per BOM
- Parts enriched, % enriched per BOM
- Parts matched, avg per BOM, % per BOM
- Parts not matched, avg per BOM, % per BOM
- of harvest requests
    - avg cycle time from request to update

    - of parts not found by 3rd day, % of BOM
    - Eventually break these down by part category, mfr
- Price Guardian
    - of Projects with pricing uploaded
    - of items where paradata provided better pricing, avg % of BOM
    - of items where customer provided better pricing, avg % of BOM
    - Total extended $ opportunity value by customer and across all customers
    - Avg % variance for paradata better pricing
    - Avg % variance for customer provided better pricing
    - Eventually break these down by part category, mfr, customer

All parts in the source OR no matched state: standard header: ipn, description, mpn, manufacturer

Ability to toggle on/off a global flag to include or exclude test accounts.

Like Junko Urata likes this

No labels

1 Comment

Michele Yoshikawa

@Jan Juna @Karel Ploc @Riki Fridrich I added the expected results for the Cost data for the Westell Account (which has 5 projects).