Tableau User Group
UC San Diego:
Executive Dashboard

UC SAN DIEGO - IPPS ANALYTICS

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Integrated Procure-to-Pay Solutions

Our mission:
Integrated procure-to-pay solutions and customer care in support of world-class education and research
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What Is The Truth?
IPPS Executive Dashboard

- Houses strategic metrics in ONE dashboard
- Owned by IPPS Core Leadership Team
- Maintained by the IPPS Analytics Team

Dashboard Features:
- 30+ Metrics
- 14 Unique Data Sources
- Visual Grading System
- Underlying Supporting Dashboards
Adventure Time

1. Defining Metrics Process
2. Leveraging Business Intelligence Features
3. Tiers & Building Data Sources
4. Grading System
5. The Lessons We Learned
Metric Collection

Leadership Buy-in is Essential
- Core knowledge and decision maker

What Metrics to Develop?
- Wish list
Juggling The List
Metric Collection

How Feasible are the Metrics?
- Importance to the organization?
- Impact to Analytics Team workload?
  - Complexity & Data Access

Continuous Engagement
- Meet with division leaders 2-3 times a week
Leveraging Analytics Tools

Business Intelligence tool: Tableau features embedded URL’s
• This is the foundation of the dashboard tier system
Avoiding The Pitfall

Pitfall: High Data Volume
High Volume of data = Slow Performance
How Much Data?!?

*No computers were harmed in the making of this dashboard
Avoiding The Pitfall

Solution:
Tier Dependent Data Sources
Data Tiers

Tier 1 = Executive Dashboard (1)
Tier 2 = Director Level Dashboard (36)
Tier 3 = Project Based Dashboard
Tier Examples

Tier 1

Tier 2
Data Structures: Tier 2

Tier 2
- Supporting details for Tier 1 metrics
- Explain WHAT is happening & WHY it is happening
- Information based on transactional level
- There is a lot of data stored in this tier
Data Structures: Tier 1

Tier 1 Metric:

Invoice Efficiency

84.9%

Goal: 90% ± 1%
Data Structures: Tier 1
Data Structures: Tier 1

Tier 1
- High level single metric visual

Key: Summarize data to build one visual
Recap Slide

Tier 1

Tier 2

Tier 3
Recap Slide

Tier 1

Tier 2

Tier 3
Grade Creation

### IPPS Executive Dashboard

**Organizational Scorecard**

<table>
<thead>
<tr>
<th>Integrated Procure-To-Pay Solutions</th>
<th>Strategic Procurement</th>
<th>Disbursements</th>
<th>Logistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>B</td>
<td>B+</td>
<td>A</td>
</tr>
<tr>
<td>Customer Relationship</td>
<td>B+</td>
<td>B</td>
<td>C</td>
</tr>
</tbody>
</table>

**FY 1819 Data**
Grade Creation

WHAT ARE YOUR GOALS?
Grade Creation

Monthly Milestone
- Financial goals
- Sales goals

Transactional Grading Buckets
- Transactional Metrics
Executive Dashboard Time!

![Executive Dashboard](image-url)
Lessons Learned

Defining Metric Goals & Benchmarks is Critical
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Subject Matter Experts are Key
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Can’t Measure What You Don’t Track
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External Data Sources
Can’t Measure What You Don’t Track
Document, Document, Document
Lessons Learned

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Document, Document, Document
Continuous Organizational Engagement
Resources

Tableau Conference 2018
  ◦ https://www.youtube.com/playlist?list=PL_qx68DwhYA_NN2iHc9hdIReSQl9FOIm1t

Tableau Training Videos
  ◦ https://www.tableau.com/learn/training

InterWorks Blog
  ◦ https://www.interworks.com/blog

Evolytics Blog
  ◦ https://www.evolytics.com/blog

Makeover Monday
  ◦ http://www.makeovermonday.co.uk/data/
All Done!

Thank You!