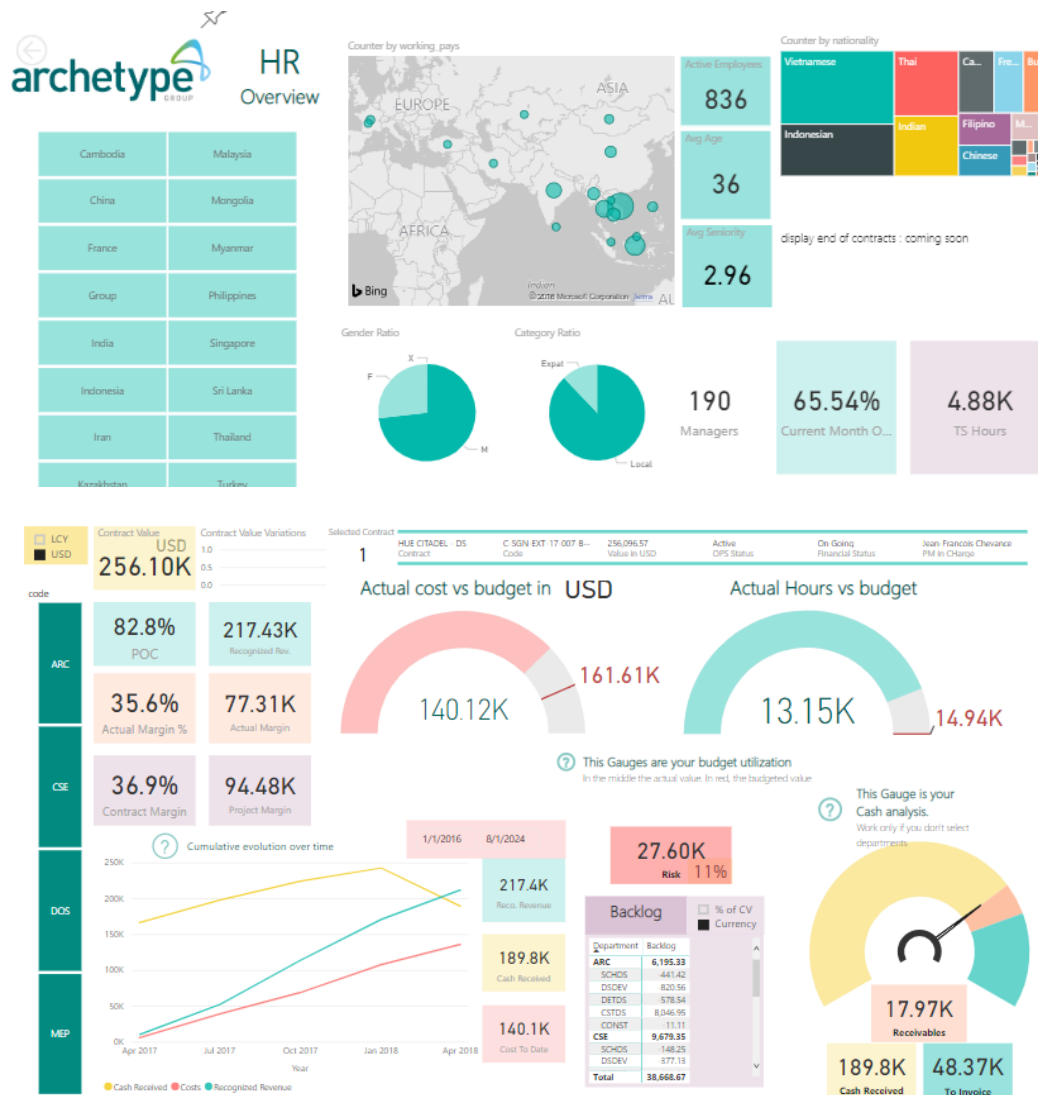


User Guide – PowerBi – Contract Analysis



Microsoft PowerBI
For Archetype Group

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CHAPTER 1: Intro and basic use.

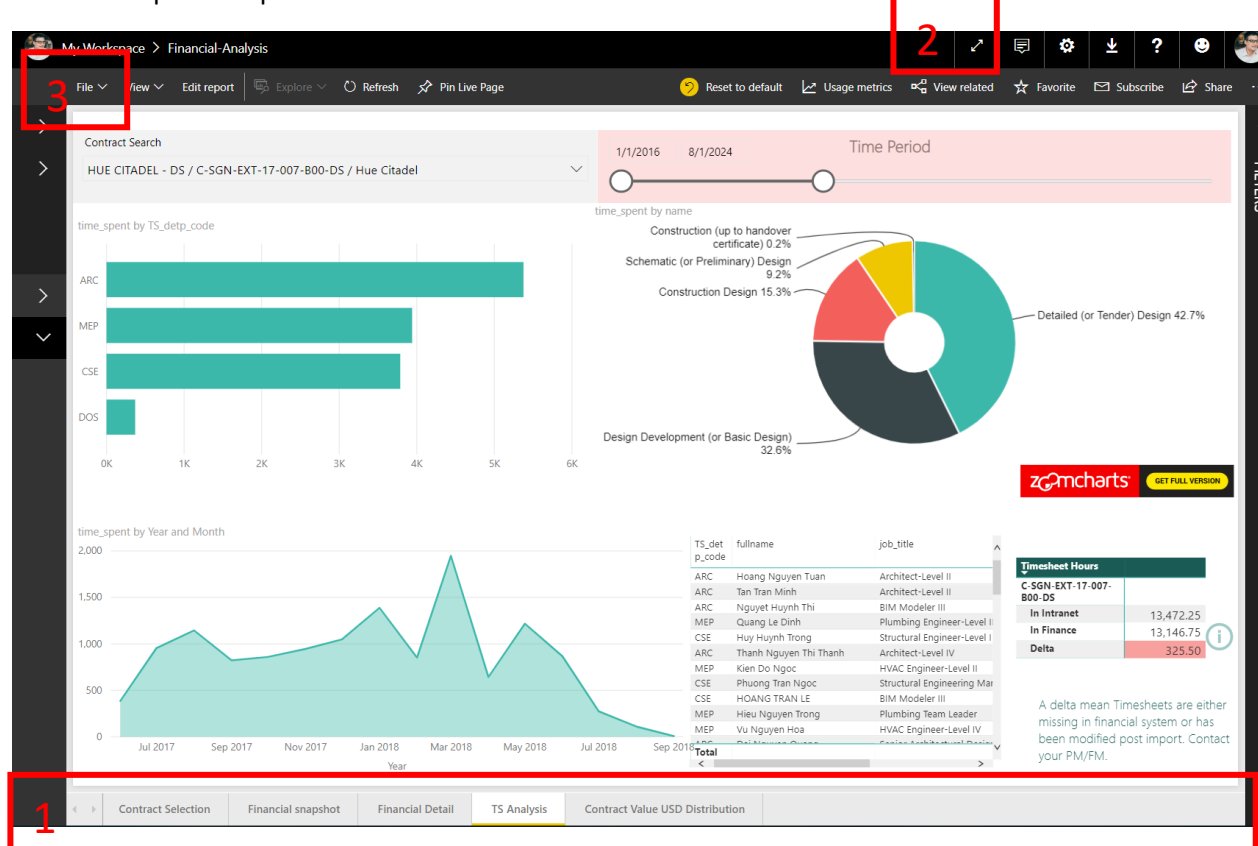
PowerBI is an interactive tool for Data Analytics. It is currently available in the Microsoft Office Suite. Archetype Group leverage it for HR, Sales, Timesheet and Finance Data Analytics.

The technology is dedicated to data consolidation from multiple systems (Intranet, Finance, Eproject) to visualize and analyses it in multiple way.

The Contract Analysis report presented in this document aim to provide clear and detailed view of a contract financial health.

With Revenues, Cost to date, Budget consumption, Margin and other key financial indicators it allow PM, MD, or anyone involved in the contract to take informed decision and steer the contract efficiently.

Here is an opened report and Microsoft offer a various set of features:



⇒ **Navigate in a report**

A report behaves like an Excel file with tab underneath the main display area. Check and click this tab to access your data. (red box n1)

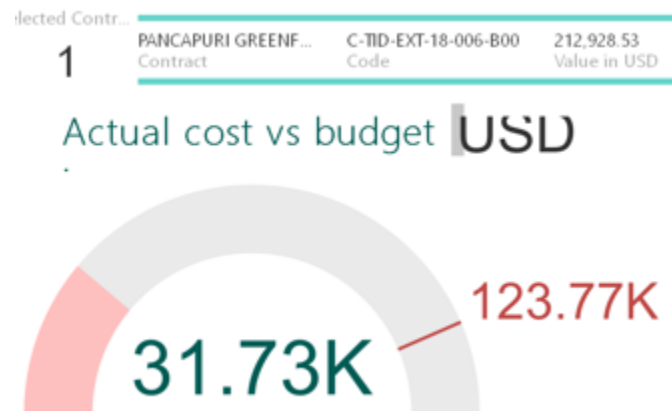
⇒ Report in FullScreen

It is much more comfortable to have it in fullscreen, click the button in the red box n2 (cf screenshot above)

⇒ Share a Report

You have many ways to share insights from a report. You are free to use one that suit the best for your use.

Fast sharing: Screenshot of what you want to share using Sniping Tool then copy/past in an email.



Share Full access: you can copy/past the link of a report to someone. If he doesn't have access the person can request access to IS team.

<https://app.powerbi.com/groups/me/reports/6ece313f-021b-4e5d-933f-395c3a108c30/ReportSection1a2b6d365e282cd19fe4>

<https://app.powerbi.com/groups/me/reports/6ece313f-021b-4e5d-933f-395c3a108c30/ReportSection1a2b6d365e282cd19fe4>

Power BI My Workspace > Financial-Analysis

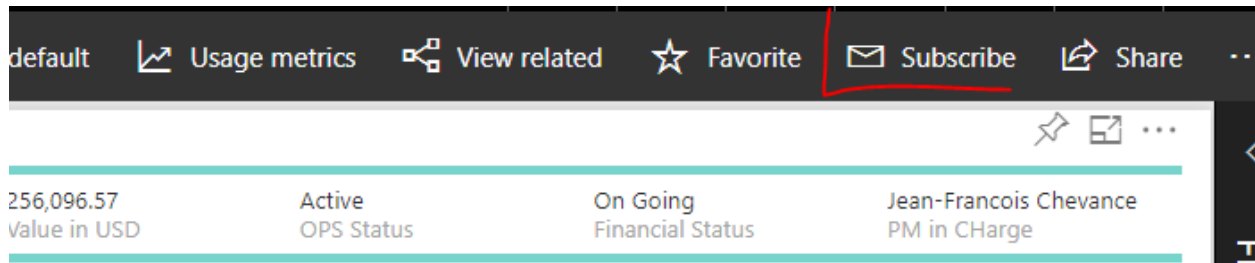
Download the report as a PowerPoint Presentation (save as PPT in red box 3 of the above screenshot):



⇒ **Subscribe to a report**

You can receive a report every day/week in your mailbox, just subscribe to it.

The subscription will take your current filter, useful if you want to track a contract or a specific office.



CHAPTER 2: Where to find it ?

⇒ **PowerBI is a Microsoft tool accessible from 3 ways:**

- 1. Your MS Office WebPortal/WebMail**
- 2. A direct link to the platform or report:**
<https://app.powerbi.com/sharedwithme>
- 3. Via a direct Link to a report in intranet menu**

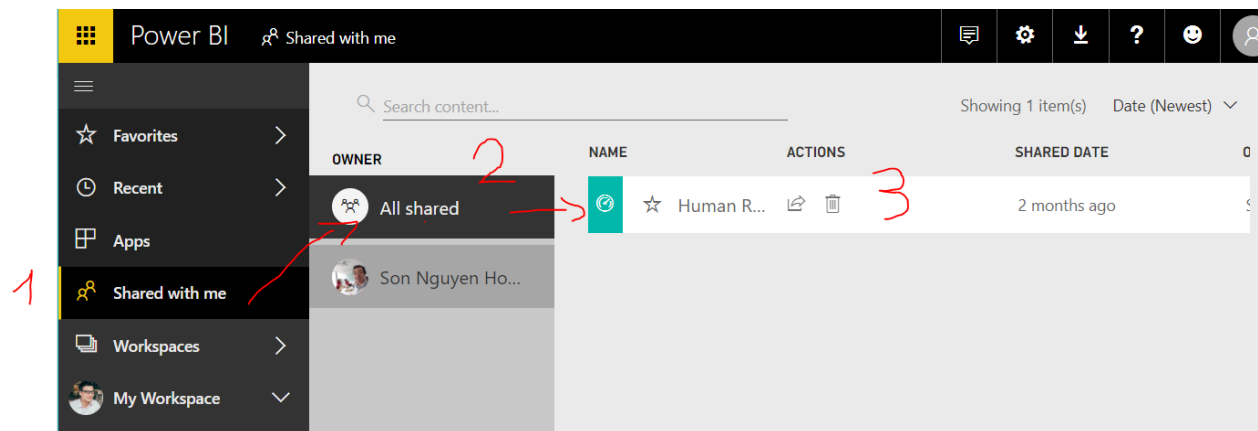
We recommend to access through method 2 & 3 for simplicity.

Once in the web portal, you will either see shared reports with you or an invitation to request access to a report.

Currently Reports must be shared with you, so if you don't see it in your list, kindly contact:
loup.rouan@archetype-group.com

If you are new to PowerBI, you must activate your 60 Days Trial access, it is a free period before we grant you a license.

Example of clicks to list and access reports shared with you :



CHAPTER 3: Content of the Report

⇒ Filter Page for Contract Selection

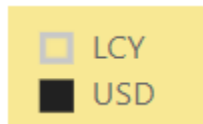
Data Filters are KEY elements to consider in any reports, they can help you to pinpoint exactly what you need, **but they can also mislead your analysis if improperly used or disregarded.**

So here are some basic knowledge and best practice to master FILTERING behaviors in PowerBI.

A filter is called a **Slicer**, as it is slicing part of the data “cake” giving you only the data you need for analysis.

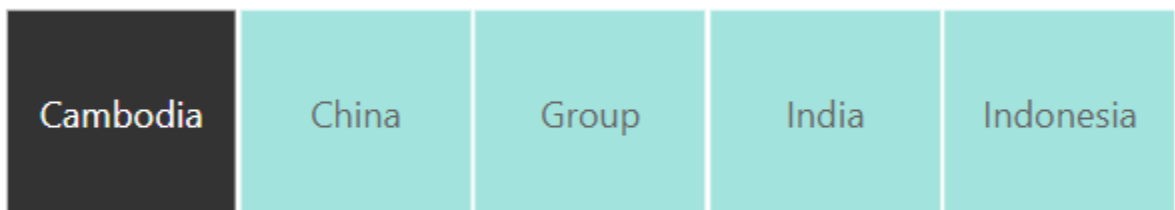
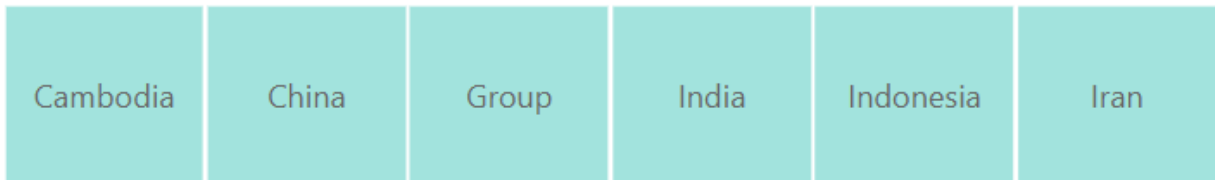
The can be identified by their 2 different form:

- **A list of items with checkboxes**



USD is **Selected**, meaning all info are displayed in USD equivalent.

- **A list of items in square buttons.**

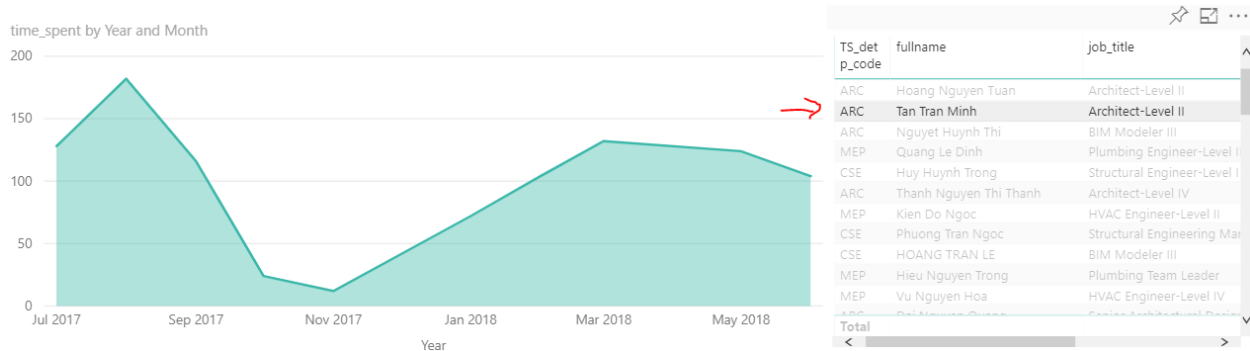


Cambodia is **SELECTED** meaning data is filtered, displaying only Cambodian information.

Slicer may have multiple selection, if it makes sense. Hold your keyboard touch “Ctrl” and Click on many items while holding the key. It will filter your data according your Multiple Selection. This work for every Visual/table too.

IMPORTANT: Note that charts, table, visual can also act as FILTERS ! It is very powerful as it can answer question like who worked on what in this contract :

If you click on an elements it will be highlighted and related other table/chart in the current report Tab will be impacted.



In the contract analysis you have quick search field allowing you to search you contract by name/code/project. Just write the beginning of what you search and the system will propose contracts.

Don't forget to click the "real" filter

Financial status:

Operational Status:

Contract Creation Date: >

Quick Search by Project Name:

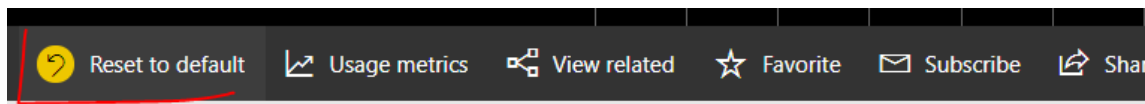
Quick Search Contract Name:

Important : be sure to always unselect your contracts before searching for an other one.

Contract Selection:

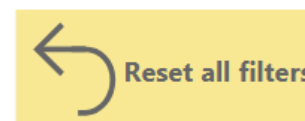
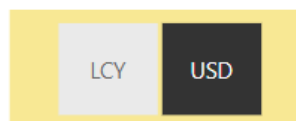
CLIK

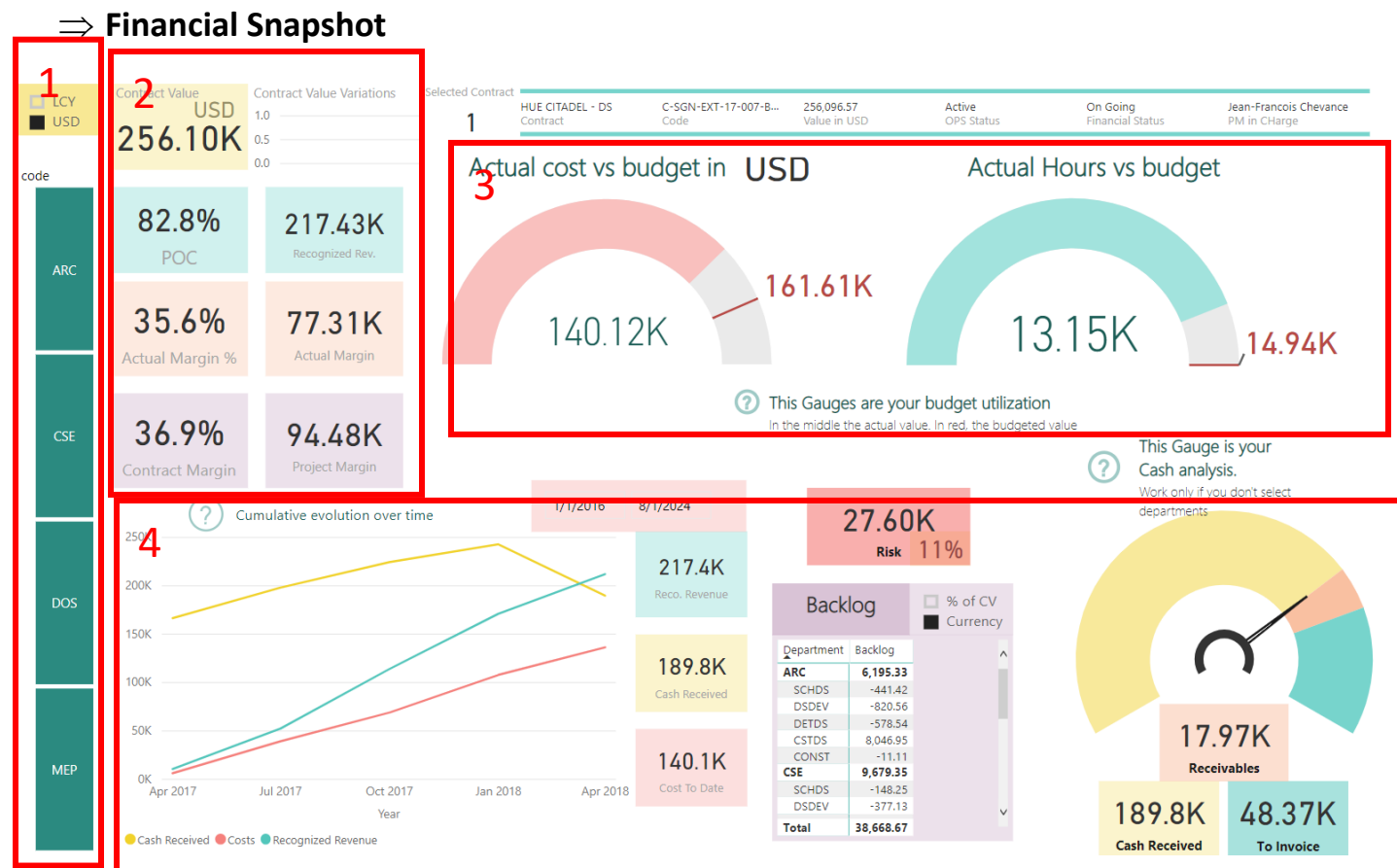
It may happen that you become lost in your filters/data so you can reset all filters by clicking either in one of 2 button below :



Filter page, you have to contract by using criterias below

1 Number o...





1. They are slicer/filters to choose if you want to see amounts in USD Equivalent/LCY or focus on a specific department. Remind to check if they are correctly set if your data seem not correct.
2. This area display basic KPI about your contract with its contract value, Budget margin (forecasted), actual Margin (current one), recognized revenue and the Percentage of completion (cost to date/budget)
3. This gauges are your budget usage in hours and money amounts.
4. This area regroup a chart displaying evolution of revenue/cost and cash received over time. The time period can be changed in the pink slicer. The backlog is the remaining revenue to recognize and the last gauge is status of the cash received, to receive and to claim.

IMPORTANT: if your data is weird or incoherent, it is probably an issue of inputs in financial system.

It can be either a contract currency not defined, a budget not uploaded or the revenue not allocated to each Phase/Department.

Contact your finance manager indicating the contract Code so he can check these elements in Navision

⇒ Financial Detail

code

1 Contract Search
HUE CITADEL - DS / C-SGN-EXT-17-007-B00-DS / Hue Citadel

LCY USD

1/1/2016 8/1/2024

RC

2

	Cost Budgeted			Allocated Revenue			Costs to Date			Revenues		Margin		CTC	
Department / Phase	Hours	SelCur.	Weight	SelCur.	Weight	Budget Margin	Hours	SelCur.	Usage	SelCur.	POC	SelCur.	Margin	Hours	SelCur.
ARC	5,955	68.7K	42.5%	108.9K	42.5%	36.9%	5,249.5	65.7K	95.2%	102.7K	92.0%	37.0K	36.0%	705.0	3.0K
Design Development (or Basic ...	1,520	19.6K	12.1%	31.1K	12.1%	36.9%	1,488.8	20.1K	100.0%	31.9K	100.0%	11.8K	37.0%	31.0	
Construction Design	2,551	24.5K	15.2%	38.9K	15.2%	36.9%	1,693.5	19.4K	77.5%	30.8K	77.5%	11.4K	36.9%	857.0	5.1K
Detailed (or Tender) Design	1,383	13.7K	8.5%	21.8K	8.5%	36.9%	1,578.0	16.3K	115.9%	22.3K	100.0%	6.0K	26.9%		
Schematic (or Preliminary) Des...	490	10.6K	6.6%	16.8K	6.6%	36.9%	476.8	9.3K	100.0%	17.2K	100.0%	7.9K	45.9%	13.0	
Construction (up to handover c...	12	0.3K	0.2%	0.4K	0.2%	36.9%	12.5	0.3K	114.6%	0.4K	100.0%	0.1K	27.7%		
Design Brief & Concept Design								0.2K				-0.2K			
Master Plan - Concept								0.0K				0.0K			
MEP	4,685	51.6K	32.0%	81.8K	32.0%	36.9%	3,917.0	37.9K	70.4%	58.9K	70.1%	21.0K	35.7%	768.0	13.8K
Detailed (or Tender) Design	2,355	20.4K	12.6%	32.3K	12.6%	36.9%	2,091.5	18.6K	88.9%	29.5K	88.9%	10.9K	36.9%	263.0	1.8K
Design Development (or Basic ...	1,505	14.2K	8.8%	22.5K	8.8%	36.9%	1,511.5	14.7K	100.9%	23.1K	100.0%	8.4K	36.3%		
Schematic (or Preliminary) Des...	177	1.9K	1.2%	3.1K	1.2%	36.9%	173.0	2.3K	100.0%	3.2K	100.0%	0.8K	26.0%	4.0	
Total	14,943	161.6K	100.0%	256.1K	100.0%	36.9%	13,146.8	140.1K	84.5%	217.4K	82.8%	77.3K	35.6%	1,796.5	21.5K

OS

MEP

3

17.97K
Acc Receivable

+ -67.13K
Accrued Rev.

+ 76.83K
Bal of Adv.

= 27.60K
Risk 11%

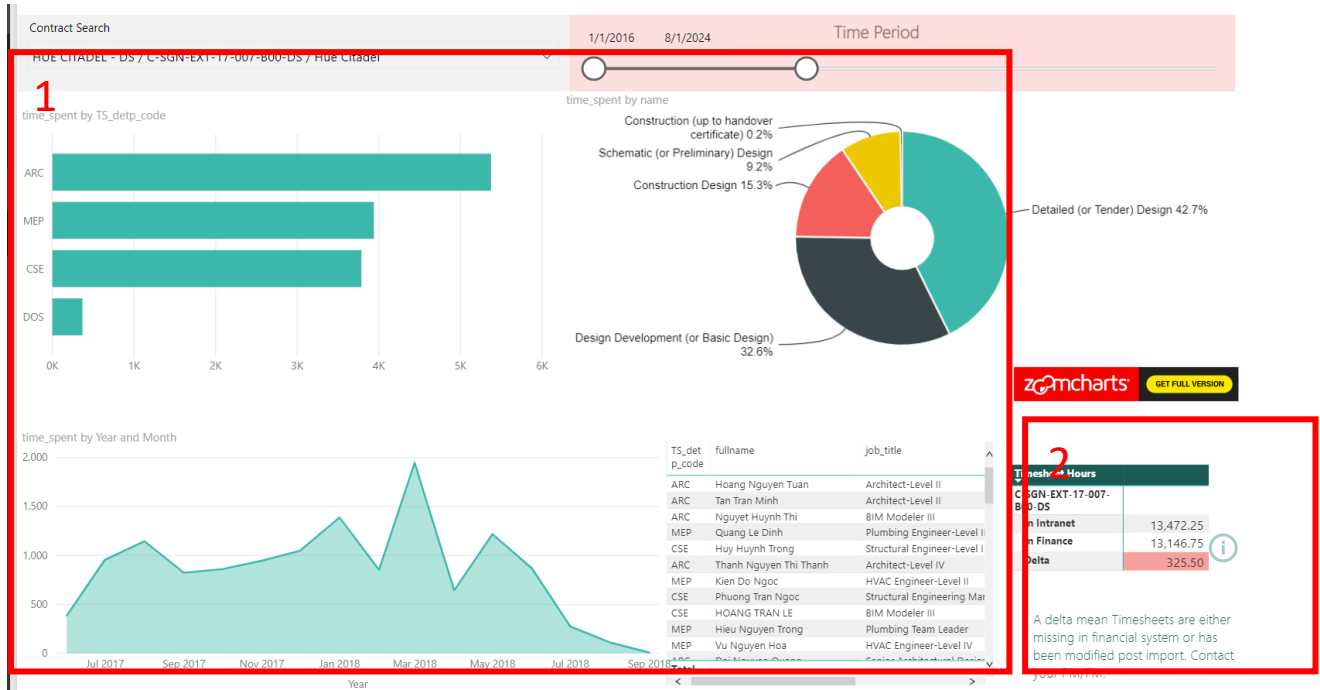
Invoice Name Invoiced to receive

C-SGN-EXT-17-007-B00-DS

01 Aug 2018	Invoice SGN-1808-JSG-095	459,462,850.00	17,973.04
29 Jun 2018	Credit Memo CR-1806002	-2,194,599,000.00	0.00
18 Jun 2018	Invoice SGN-1806-JSG-038	853,288,150.00	0.00
30 Mar 2018	Invoice SGN-1803-JSG-012	131,275,100.00	0.00
27 Feb 2018	Invoice SGN-1802-JSG-004	328,187,750.00	0.00

1. This filter allows you to control the contract (reminder) you are viewing, the currency to display and the time period where Revenue and Cost has been inputted in the finance system.
Be careful on the time period defined, if it is improperly set, you may miss the full picture of your contract.
2. The table including all details, such as cost to date, cost to complete and revenues, detailed by PHASE and Department. You can also focus on a specific department with the left side filter.
3. The Risk of your contract, the more it is high in amount and %, the more we risk a negative impact in case of issue in payment. If it is negative it fine. You also have a table displaying issued invoices and their status.

⇒ TS Analysis



1. This area allows you to overview Timesheet booking for your specific contract, it displays repartition of booked time by phase/department/people over a time dimension. With it you can see for example, when many departments work at the same time on which phase and even who is involved.
2. The delta of Timesheet in Intranet and Navision, meaning that finance may have booked too much or not enough of the timesheet booked in intranet. If the gap is too big or negative please contact your finance manager with IS team in CC.