UC San Diego: Executive Dashboard
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
IPPS Structure
Metric Collection

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

What Metrics to Develop?
• Wish 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

Invoice Efficiency

Payment Distribution

Electronic Payment

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:
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

<table>
<thead>
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<th>Integrated Procure-To-Pay Solutions</th>
<th>Strategic Procurement</th>
<th>Disbursements</th>
<th>Logistics</th>
<th>Missing Metrics?</th>
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<td>B</td>
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<td>B</td>
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UC San Diego IPPS Executive Dashboard
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!
Lessons Learned

Defining Metric Goals & Benchmarks is Critical
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Subject Matter Experts are Key
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Subject Matter Experts are Key
External Data Sources
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External Data Sources

Can’t Measure What You Don’t Track
Lessons Learned

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Subject Matter Experts are Key
External Data Sources
Can’t Measure What You Don’t Track
Document, Document, Document
Lessons Learned

Defining Metric Goals & Benchmarks is Critical
Subject Matter Experts are Key
External Data Sources
Can’t Measure What You Don’t Track
Document, Document, Document
Continuous Organizational Engagement
Mission Accomplished

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