

Standard Operating Procedure (SOP)

SOP Topic	Power BI Dashboards (Executive Report)
Effective Date	20 October 2025
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Purpose

This SOP outlines how to access and use the Executive Power BI Dashboards for business reporting, trend analysis and strategic decision-making. It also defines the calculation logic behind key business metrics such as Revenue, Cancellation Rate and Gross Margin to ensure reporting consistency across the business.

Alignment to 3S's Framework

The executive dashboard aligns with the 3 S's framework as outlined in the below table.

Principle	Alignment
Scalable	Built using Azure Data Factory with parameter-driven pipelines that easily expand across regions, data sources, and future reporting needs without redevelopment.
Sustainable	Automated data refresh eliminates manual reporting effort and maintains long-term operational efficiency, while the solution is designed using the most cost-effective architecture.
Secure	Role-based access and authentication through Microsoft Entra ensure controlled access to business performance data.

Scope

This SOP applies to Executives, General Managers and Operations Managers who require high-level analytics to support strategic decision-making.

Access Overview

This Dashboard is hosted via <https://lavidahomes.net/>, a restricted static website hosted in La Vida Homes Microsoft Ecosystem. All data remains stored within Azure, with no public access enabled, user-based permissions restricting access within the business.

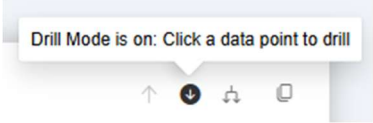
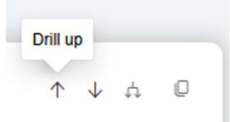
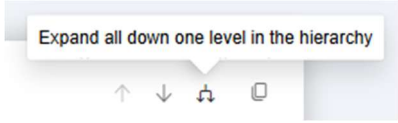
Access Guide

1. Access the secure website via the URL provided. (Bookmark / Favourite on browser for future use).
2. Sign in using Microsoft 365 credentials, specifically your "@lavidahomes.com.au" email.
3. Select "Executive Report" dashboard from navigation menu.

Note: Only authorised users have been granted access to the Executive Report.

Power BI Basic's | How to Interact with Charts

Power BI dashboards are interactive. Key functions include:

Function	Information
Page Select 	The Executive Dashboard opens on the Revenue page by default. Use the page navigation bar at the bottom of the report to move between dashboard sections.
Drill Down (Click down arrow to turn on) 	Select the down arrow to enable a chart to explore data by hierarchy (e.g. Year → Quarter → Month). <i>Tip: Disable drill-down mode when selecting specific data points to allow other visuals on the page to cross-filter correctly.</i>
Drill Up 	Use the up arrow to go back to a higher level in the hierarchy.
Expand One Level 	Use the "Expand to Next Level" option to display multiple hierarchy levels at once (e.g. View Year and Quarter together). <i>Tip: Helpful tool for reviewing Quarter & Year Trends together.</i>
Tool Tips (Hover) 	Hover over charts to see additional information if available. <i>Note: Some charts do not have additional tool tip information.</i>

Dashboard Structure & Metric Definitions

The dashboard is organised into logical reporting sections such as Revenue, Sales Performance, Cancellations and Gross Margin. Metric definitions outline exactly how each KPI is calculated, what data is included or excluded, and the business rules applied.

Dashboard Overview

Revenue Page:

- Contract value totals for WA & SA + division percentages.

Sales Performance:

- Volume metrics by Sales Rep, Suburb, Contract price. Average Job cost, Contract price and current gross profits.

Cancellation Details pages:

- Additional sales rep and job specific cancellation information.

Metric Definitions

Revenue Page

Measure	Calculation Parameters
Revenue (Contract Price inc GST)	Sums total job contract values (inc. GST), excluding post-contract variations, to show confirmed revenue by contract signed date. → Includes only jobs with a Contract Signed Date → Excludes cancelled jobs → Date filter is based on Contract Signed Date → Stacked chart visualizes revenue total and split between WA and SA
Division Chart	Displays the total contract value, divided proportionally by each job's assigned division. → Sums contract price across all jobs → Splits values by each job's division % to show contribution per division

WA & SA Sales Page's

Measure	Calculation Parameters
Average Contract Price	Calculates the average job contract value (inc. GST), excluding any post-contract variations. → Includes only jobs with a Contract Signed Date → Excludes cancelled jobs → Reflects the original contract price without later adjustments
Gross Profit %	Calculates the average margin % across all active jobs, updating dynamically as costs and sales adjust throughout each project. → Includes jobs with "Print Orders" task completed (excludes admin-stage jobs) → Excludes cancelled jobs → Reflects current margin based on live cost and price data
Average Job Cost	Calculates the average job cost (inc. GST) for completed "Print Orders" tasks, excluding cancelled jobs. → Includes only jobs with the "Print Orders" task completed → Excludes cancelled jobs (admin-stage jobs not counted) → Reflects current scheduled cost including GST
Sales VS Cancellations	Compares the number of jobs with a signed sales quote against the number of cancelled jobs. → Sales bars show jobs with a Sales Quote Signed Date → Cancellation bars show jobs with a Cancellation Date → Date filter uses the Sales Quote Signed Date
Rep Number of Jobs	Counts how many jobs have a "sales quote signed date" and are linked to a Sales Rep. → Count of jobs with a sales quote signed → Includes cancelled jobs → Filtered via roles to Sales Rep jobs only
Rep Cancellation Rate	Calculates the percentage of Sales Rep-linked jobs that were cancelled after a sales quote was signed. → Includes only jobs linked to a Sales Rep → Based on Sales Quote Signed Date → Cancelled jobs ÷ total signed jobs for WA
Cancellation Rate Trend	Calculates the percentage of jobs cancelled after a sales quote was signed, based on Sales Quote Signed Date. → Cancelled ÷ total signed jobs → Excludes jobs without a signed quote → Date filter uses Sales Quote Signed Date

Jobs per Suburb	Counts jobs with a signed sales quote, broken down by suburb. → Counts all jobs with a sales quote signed → Breaks results down by suburb → Includes cancelled jobs → Date filter is based on the Sales Quote Signed Date
YoY % Changes	Calculates how total contract value has changed compared to the same period in the previous year, dynamically adjusting to the selected date level (year, quarter, or month). → Shifts the current date context back one year → Adapts seamlessly when drilling between year, quarter, or month views in reports. → Returns blank if there is no matching prior-year data. → Date filter is based on the Contract Signed Date. → Inherits the same filters and conditions as the Contract Value measures in the revenue chart

Cancellation Details Page's

Measure	Calculation Parameters
Number of Cancelled Jobs	Counts the total number of jobs that have been cancelled after being sold. → Includes only jobs with a Cancellation Date → Shows total cancelled jobs over time → Date filter is based on the Sales Quote Signed Date
Average Days to Cancel	Average number of days from sales quote signed to cancellation, for cancelled jobs. → Includes only jobs with both a signed quote and a cancellation date → Measures days between quote signed and cancellation → Result is rounded to whole days
Cancellation Rate	Percentage of jobs cancelled after a sales quote was signed; Updates automatically based on the selected Sales Rep. → $\text{Cancelled} \div \text{total signed jobs}$ → Date filter uses the Sales Quote Signed Date

Data Refresh Mapping

Daily (7.00am)

Major data sets containing task and job information update once daily at 7am Perth time (AWST)

- Main Dashboard Data for WA & SA jobs
- Task Data for WA & SA
- Example: All admin & construction tasks, job contract pricing, sales dates, cancellation dates.

Weekly (Monday 7:00am)

Smaller data sets containing task and job information update once a week on a Monday morning at 7am Perth time (AWST)

- Small Datasets used to map roles, vendors, users.
- Example: New users, New vendors, Role changes.

Support

Owner: National System Development Manager

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Purpose: Dashboard access, enhancements, training & support