Imperial College Union EPOS Dashboard v1 brief

Project Aims

This project is intended to capture the first phase of requirements in the development of a reporting dashboard based on data from our EPOS system. The ultimate aim is to have an at-a-glance view of how the Union is performing across the organisation, ideally bringing in 'softer' metrics and other data such as footfall counts to encourage a broader view of the overall performance of the Union's outlets, events and activities.

The first stage in this process is to produce a dashboard using the data already available within the EPOS system. We have a good reference point for this; the Union's previous EPOS system provided a dashboard system that was used by licensed trade managers to assess performance and make decisions based on the data in front of them. The baseline for success at this stage is to get to the point where our dashboard is at least able to mimic the functionality of our previous system.

A dashboard should be:

- **Accessible.** Easily inform the organisation, managers, and board of our performance
- **Time-saving.** Help managers operate better and make informed decisions at a glance
- **Balanced.** Give a sample of how we are doing across different metrics to build a broad view
- **Live.** The dashboard needs to show up-to-the-minute data

Requirements

The requirements detailed below are 'version 1' for this project. This means that these are the minimum expectations at this stage and will be developed as knowledge of the data available increases and organisational needs change.

The Dashboard must show 'live' data, meaning that when the dashboard is loaded it is able to show figures so far for that day and will update on reload showing new figures. In future it would be ideal to have this as truly 'live' so the dashboard updates in real-time.

The below tables gather the required metrics for display on the dashboard, split by Overall (all outlets), Bars and Shop.

General (Total figures across all outlets)

Data	Time Period	Visual Representation
Sales by hour	Today	Graph
Average Spend per sale	Today	Number
Total sales by outlet	Today	Number
Sales by hour	This day last year	Graph
Average Spend per sale	This day last year	Number
Total sales by outlet	This day last year	Number
Total Sales per day	Last 30 Days	Graph

Bars

Data	Time Period	Visual Representation
Sales by hour	Today	Graph
Total Dry Sales	Today	Number
Total Wet Sales	Today	Number
Average Spend per sale	Today	Number
Total sales by outlet	Today	Number
Sales by hour	This day last year	Graph
Total Dry Sales	This day last year	Number
Total Wet Sales	This day last year	Number
Average Spend per sale	This day last year	Number
Total sales by outlet	This day last year	Number
Total Sales per day	Last 30 Days	Graph

Shop

Data	Time Period	Visual Representation
Sales by hour	Today	Graph
Average Spend per sale	Today	Number
Total sales by outlet	Today	Number
Sales by hour	This day last year	Graph
Average Spend per sale	This day last year	Number
Total sales by outlet	This day last year	Number
Total Sales per day	Last 30 Days	Graph
Total Sales vs budget	Week to date	Number
Total Sales vs budget	Month to date	Number
Total Sales vs budget	Year to date	Number
Total Sales Year on Year	Week to date	Number
Total Sales Year on Year	Month to date	Number
Total Sales Year on Year	Year to date	Number
Total negative on hands stock by outlet	Today	Number
Number of items sold on misc barcodes	Today	Number
Total value of stock by outlet	Today	Number
Total value of stock	Today	Number
Unconfirmed stock adjustments	Today	Number