EVision Power BI Functionality & Benefits

EQUE2

EVision Power BI Report – Reporting Tabs and Business Benefits

The EVision Project Overview Power BI Report is designed to provide construction businesses with a single source of project intelligence, enabling users to move from high-level portfolio reporting to detailed transactional analysis. Monitor progress, uncover actionable insights, and keep projects on track to strengthen delivery confidence and margin control.

1. Projects Overview

What the Report Provides
The Projects Overview tab delivers a high-level dashboard comparing key project performance measures against budgets and targets. It shows:

- Actual Margin % vs Target Margin %
- Calculated Margin % vs Target Margin %
- Actual Costs vs Cost Budget
- Actual Revenue vs Revenue Budget

Users can drill through from summary visuals into underlying project information and, where applicable, further into transactional detail.

Business Benefit
Construction businesses often operate on tight margins, making early visibility of project performance critical. This dashboard provides an at-a-glance view of whether projects are meeting their profitability targets and staying within approved budgets. By highlighting variances between actual and planned performance, commercial teams can quickly identify projects that require intervention before issues escalate and impact overall business profitability.

2. Parent Project Detail

What the Report Provides
This tab presents financial and commercial information for parent projects and their associated child projects. It provides rolled-up totals for the overall project while also showing the contribution of each child project. Key measures include:

- Revenue and Cost Budgets
- Budget and Actual Margins
- Target Margin %
- Committed and Accrued Costs
- Cash In, Cash Out and Net Cash
- Calculated Margin Analysis

Users can drill down to supporting transaction detail.

Business Benefit
Many construction contracts are delivered through multiple phases, work packages or sub-projects. This tab enables management to understand both overall contract performance and how individual child projects contribute to the result. It helps identify which elements of a larger project are performing well and which may be generating cost overruns, programme delays, or reduced margins

3. Project Detail

What the Report Provides
The Project Detail tab contains the same financial and commercial measures as the Parent Project Detail report but presents them at individual project and project task level. Transactional drill-down is also available.

Business Benefit
This report supports day-to-day project management by enabling teams to monitor profitability, costs and revenue at a detailed operational level. By understanding performance at project-task level, businesses can identify problem areas more quickly, improve accountability and make informed decisions to protect project margins.

4. Project Retentions

What the Report Provides
This tab reports on:

- Retentions owed by customers
- Retentions owed to subcontractors
- Project-level retention balances

Users can drill back to the transactions making up these values.

Business Benefit
Retentions can represent substantial amounts of money tied up within construction projects. can represent significant amounts of working capital within construction businesses. Monitoring retention balances helps ensure that money owed by customers is recovered promptly while also managing retention liabilities due to subcontractors. This visibility reduces financial risk and supports stronger working capital management.

5. Subcontractor Summary

What the Report Provides
The Subcontractor Summary tab provides an overview of subcontractor-related activity by project and project task, together with detailed transactional drill-back.

Business Benefit
Subcontractors typically account for a substantial proportion of project costs. This tab provides visibility into subcontractor commitments and expenditure, enabling businesses to monitor performance against budgets and contractual agreements. Better control of subcontract costs directly contributes to protecting project margins and reducing commercial risk.

6. Remaining Purchase Commitments

What the Report Provides
This report shows outstanding commitments by project and task, including:

- Material commitments
- External plant commitments
- Supplier commitment analysis

It also allows users to drill into the transactions comprising these commitments.

Business Benefit
Construction projects often involve significant future commitments for purchased items. Understanding these commitments helps project teams forecast final project costs more accurately, identify potential budget pressures and reduce the likelihood of unforeseen cost overruns later in the project lifecycle.

7. Plant Over Runs

What the Report Provides
This tab highlights:

- Internal plant overruns
- External plant overruns
- Number of overrun items per project and task

Business Benefit
Plant and equipment costs can increase rapidly when items remain on-site longer than planned. This tab helps identify projects where internal or externally hired plant is overrunning, enabling managers to investigate causes and take corrective action. Reducing plant overruns can significantly improve site efficiency and minimise unnecessary cost leakage.

8. Project Sales Over Runs

What the Report Provides
This tab provides detailed contract and sales information, including:

- Revenue Budget
- Total Sales
- Certified to Date
- Invoiced to Date
- Retention to Date
- Remaining Revenue
- Contract Sales Costed to Project
- Customer and Billing Information

The report also compares actual sales activity against planned revenue.

Business Benefit
Revenue recognition and cash generation are fundamental to the success of any construction business. This tab provides visibility into contract value and invoicing progress. It helps commercial teams ensure that work completed is being recovered promptly and that project revenue aligns with expectations and contractual milestones

9. Project Information

What the Report Provides
This tab displays general project information together with a geographical map showing project locations. Users can drill into projects by location to gain further insight.

Business Benefit
Having a centralised view of project locations helps management understand the geographical spread of work and identify regional trends. It supports resource planning, operational oversight and strategic decision-making while providing an easy way to visualise where projects are being delivered.