

FINDASH Consultant Dashboard

User Manual



19th May 2022

CONFIDENTIAL – SENSITIVE

The information contained in this Document is confidential, sensitive, privileged and only for the use of the intended recipient. Any other party or person other than the intended recipient should not use, publish, or redistribute without the prior written consent of intended recipient.

Table of Contents

Introduction 2

What it shows? 2

 Home/ Main Dashboard 2

 Teams Dashboard..... 3

 Individual Dashboard 7

How is it shown?11

How it all works?12

Got Questions or Concerns?13

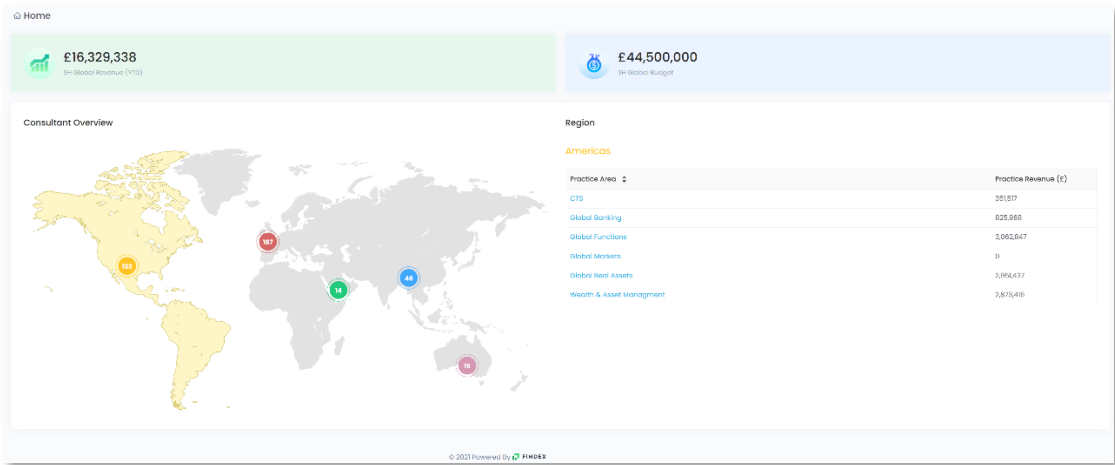
Introduction

This document is intended to provide the Managerial/Executive users with a preliminary understanding of the functioning of the Consultant Dashboard system.

What it shows?

Home/ Main Dashboard

1.0



This is your main dashboard or the Firm Overview.

Please note that this Dashboard is designed to display only the values relevant to the current year.

This page displays the Global Revenue (YTD Invoiced) of the company in the upper left corner and the Global Budget in the upper right corner.

The Consultant Overview Map displays the consultant’s practice areas and they are categorized geographically within 5 distinct regions globally.

- i. Americas.
- ii. United Kingdom.
- iii. Middle East.
- iv. APAC.
- v. Australia.

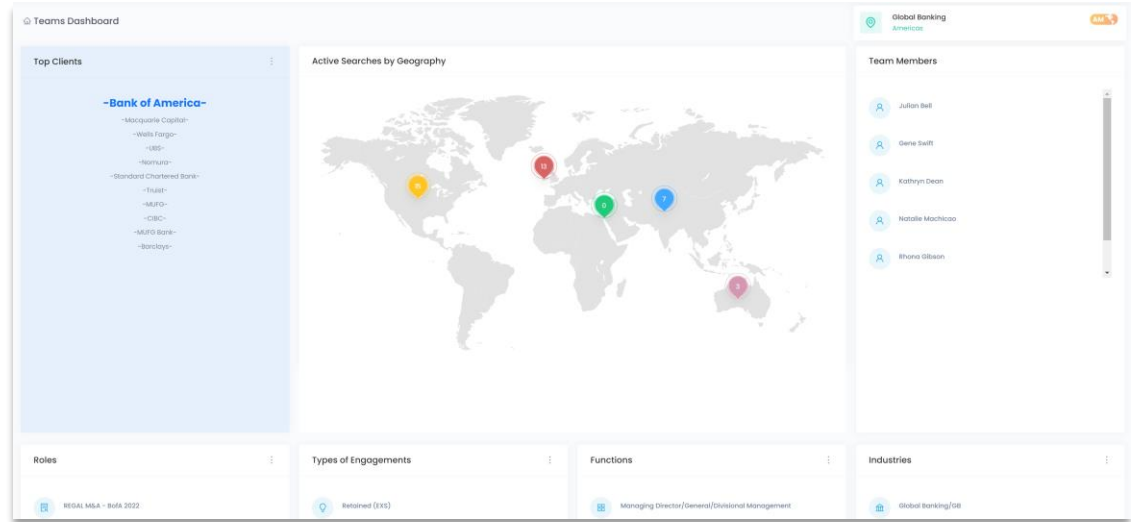
The number listed on top of each region displayed on the map, represents the total no. of “Active” & “Complete” projects within all practice areas of the region.

Once a region is selected, all the practice areas within will be displayed along with its revenue in a tabular format.

The user may click on the practice area name to enter into its “Teams Dashboard”.

Teams Dashboard

2.0



This is your “Teams Dashboard”.

Please note that this Dashboard is designed to display the values relevant only to the current calendar year and the information relevant to a specific practice area.

2.1



This card displays the “Top Clients” of the selected practice area in a descending order.

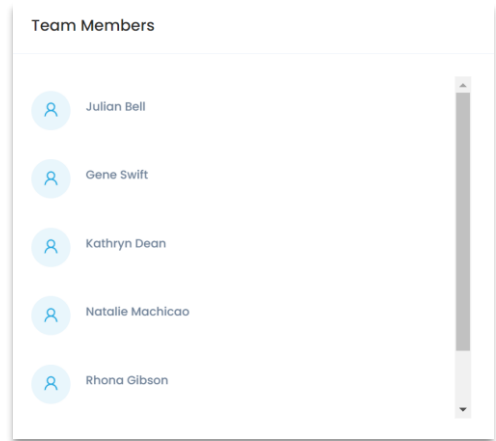
Users may click on the “⋮” icon to view all clients of the selected practice area.

2.2



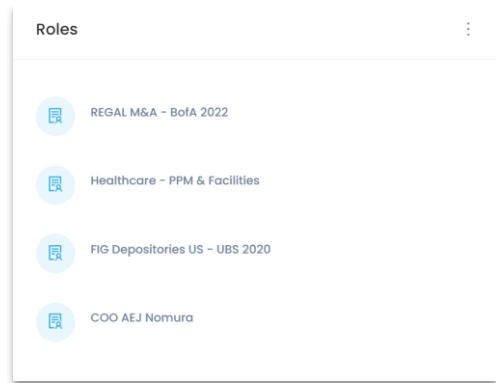
This Map displayed in “Teams Dashboard” represents the no. of assignments received from each region.

2.3



This card displays the “Team Members” of the selected practice area.

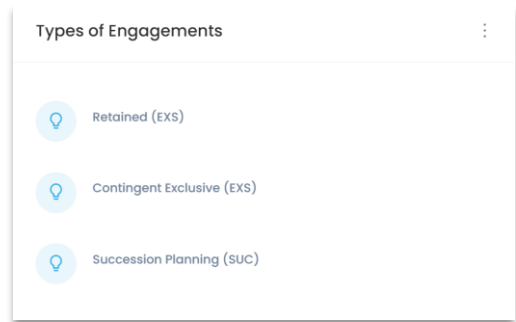
2.4



This card displays the top “Roles” catered by the selected practice area in a descending order.

Users may click on the “⋮” icon to view all roles catered by the selected practice area.

2.5

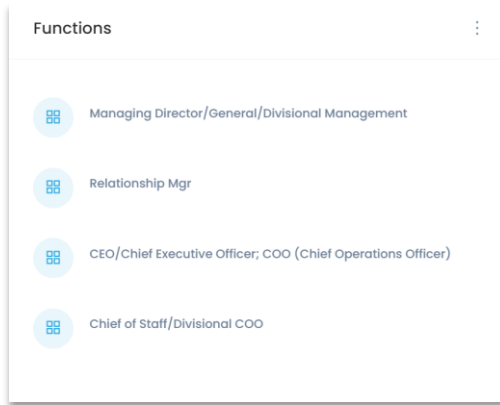


This card displays the top “Types of Engagements” for the selected practice area.

This information is displayed in a descending order.

Users may click on the “⋮” icon to view all “Types of Engagements” for the selected practice area.

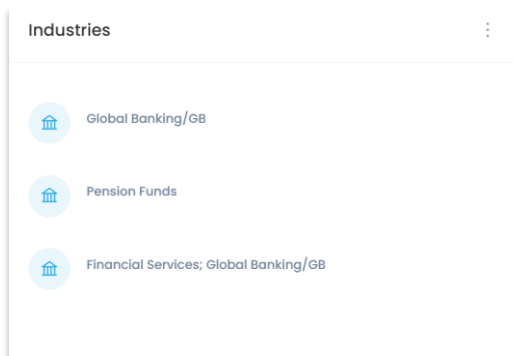
2.6



This card displays the top “Functions” of the selected practice area in a descending order.

Users may click on the “⋮” icon to view all “Functions” of the selected practice area.

2.7



This card displays the top “Industries” catered by this practice area in a descending order.

Users may click on the “⋮” icon to view all “Industries” catered by this practice area.

2.8



These two cards display the “Total YTD Gross” and the “Scheduled Gross” values of the selected practice area for the current year.

The total YTD gross value is calculated with the sum of revenue of all assignments in which the **main handling consultant** is a member of the team.

2.9

Position Title	Company Name	Assignment Status	Start Date	Type Of Engagement	Industry	YTD Gross
+ REGAL M&A - BofA 2022	Bank of America	Active	Mar 4, 2022	Retained (EXS)	Global Banking/GB	55,334
+ Healthcare - PPM & Facilities	Macquarie Capital	Active	Feb 16, 2022	Retained (EXS)	Global Banking/GB	48,690
+ FID Depositories US - UBS 2020	UBS	Completed	Apr 26, 2021	Retained (EXS)	Global Banking/GB	107,164
+ COO Allj Nomura	Nomura	Active	Oct 14, 2021	Contingent Exclusive (EXS)	Global Banking/GB	93,956
+ Executive Director, Public Pension Funds	Standard Chartered Bank	Active	Feb 10, 2022	Retained (EXS)	Pension Funds	56,223
+ Equity Privates MD/Head	Wells Fargo	Active	Feb 17, 2022	Retained (EXS)	Global Banking/GB	0
+ Managing Director or Director/Executive Director, ASG	Truist	Active	Feb 21, 2022	Retained (EXS)	Financial Services; Global Banking/GB	111,708
+ MD, Head of Financial Institutions Greater China	Mufg	Active	Dec 10, 2021	Retained (EXS)	Global Banking/GB	117,202
+ Energy M&A	Bank of America	Active	Mar 25, 2022	Retained (EXS)	Global Banking/GB	73,778
+ Food & Beverage	Macquarie Capital	Active	Feb 16, 2022	Retained (EXS)	Global Banking/GB	48,690

This card displays the project (Assignment) details in a tabular format.

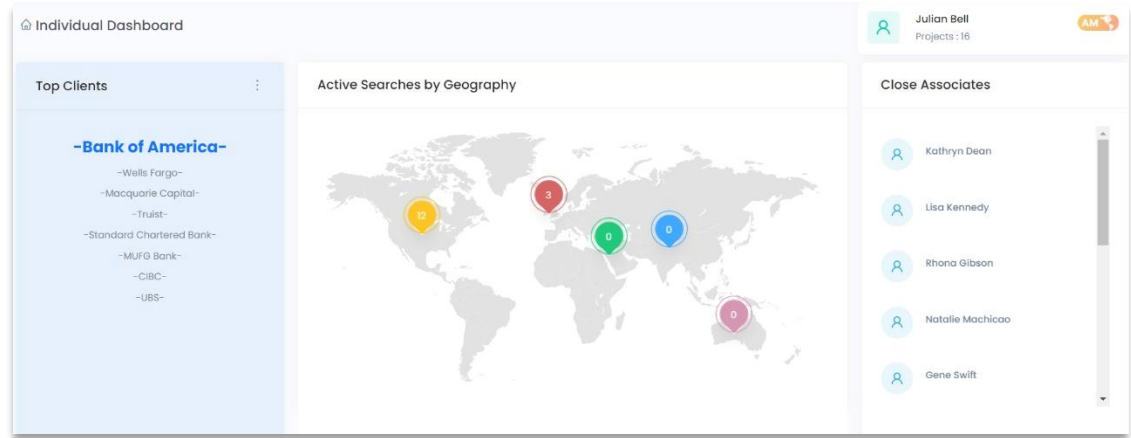
Basic details of an assignment are displayed on this table.

- i. Position title
- ii. Company name
- iii. Assignment status
- iv. Start date
- v. Type of Engagement
- vi. Industry
- vii. YTD Gross

Users may click on the “+” icon to view the “Project Team” and the Scheduled Gross for a selected assignment.

Individual Dashboard

3.0



This is your “Individual Consultant Dashboard”.

Note that this Dashboard is designed to display only the values relevant to the current year.

This dashboard is designed to display all information relevant to a specific consultant.

Note that “Individual Consultant Dashboard” access will be limited to other consultants that are in the same practice area and region. Additionally, Administrators, Legal Users and Finance Users will have access to all Individual Consultant Dashboards.

3.1



This card displays the “Top Clients” of the selected consultant in a descending order.

Users may click on the “⋮” icon to view all clients of the selected consultant.

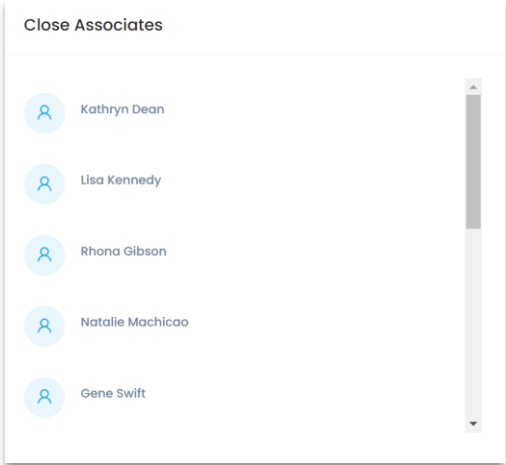
3.2



This Map is displayed in “Individual Consultant Dashboard” represents the no. of assignments received from each region for the selected consultant.

The selected consultant is assigned as the “Consultant Handling” or “Supporting Consultant” for these assignments.

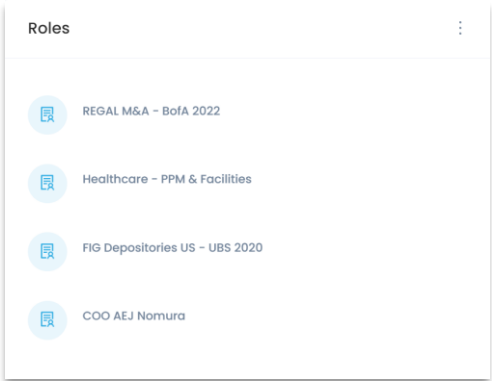
3.3



This card displays the “Close Associates” of the selected consultant.

Any Consultant that is engaged in the assignment will be listed as close associates of the selected consultant.

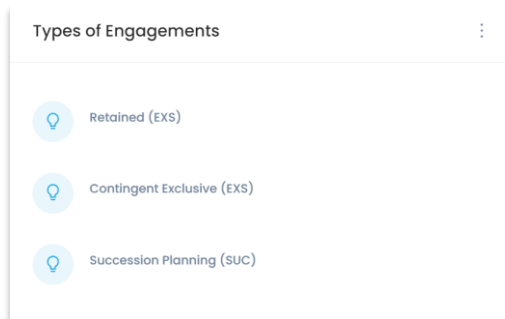
3.4



This card displays the top “Roles” catered by the selected consultant in a descending order.

Users may click on the “⋮” icon to view all roles catered by the selected consultant.

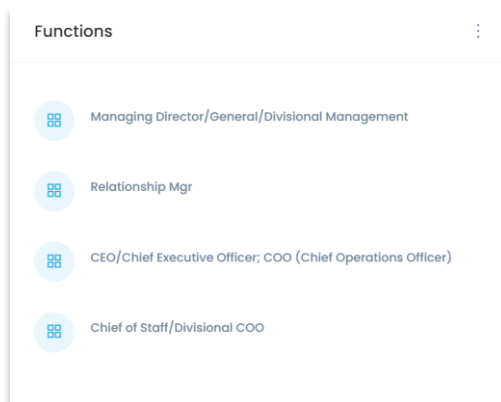
3.5



This card displays the “Types of Engagements” of the selected consultant in a descending order.

Users may click on the “⋮” icon to view all “Types of Engagements” of the selected consultant.

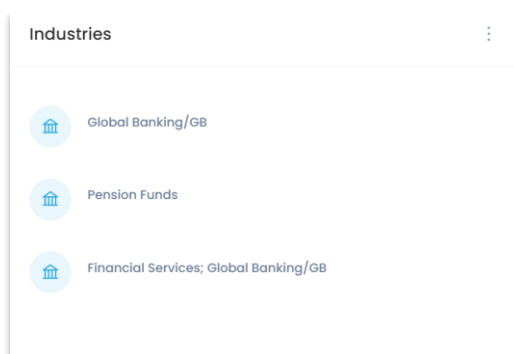
3.6



This card displays the top “Functions” of the selected consultant in a descending order.

Users may click on the “⋮” icon to view all “Functions” of the selected consultant.

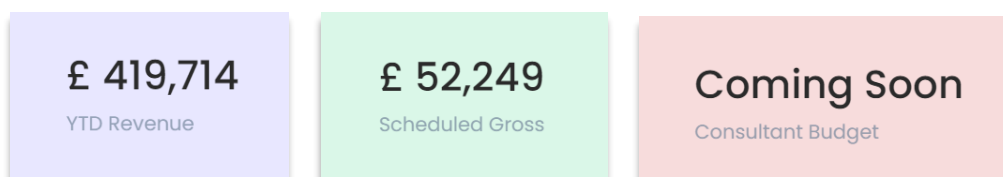
3.7



This card displays the top “Industries” catered by the selected consultant in a descending order.

Users may click on the “⋮” icon to view all “Industries” catered by the selected consultant.

3.8



These three cards display the “YTD Revenue”, “Scheduled Gross” and “Consultant Budget” values of the selected consultant for the current year.

The YTD revenue Card shows the sum of the revenue earned by the consultant from each assignment they are engaged in.

3.9

Position Title	Company Name	Assignment Status	Start Date	Type Of Engagement	Industry	YTD Gross
+ REGAL M&A - BofA 2022	Bank of America	Active	Mar 4, 2022	Retained (EXS)	Global Banking/GB	55,334
+ Healthcare - PPM & Facilities	Macquarie Capital	Active	Feb 16, 2022	Retained (EXS)	Global Banking/GB	49,690
+ FID Depositaries US - UBS 2020	UBS	Completed	Apr 26, 2021	Retained (EXS)	Global Banking/GB	107,164
+ COO AEJ Nomura	Nomura	Active	Oct 14, 2021	Contingent Exclusive (EXS)	Global Banking/GB	93,956
+ Executive Director, Public Pension Funds	Standard Chartered Bank	Active	Feb 10, 2022	Retained (EXS)	Pension Funds	56,223
+ Equity Privates MD/Head	Wells Fargo	Active	Feb 17, 2022	Retained (EXS)	Global Banking/GB	0
+ Managing Director or Director/Executive Director, ASG	Truist	Active	Feb 21, 2022	Retained (EXS)	Financial Services; Global Banking/GB	11,708
+ MD, Head of Financial Institutions Greater China	M&FG	Active	Dec 10, 2021	Retained (EXS)	Global Banking/GB	117,212
+ Energy M&A	Bank of America	Active	Mar 26, 2022	Retained (EXS)		73,778
+ Food & Beverage	Macquarie Capital	Active	Feb 16, 2022	Retained (EXS)	Global Banking/GB	49,690

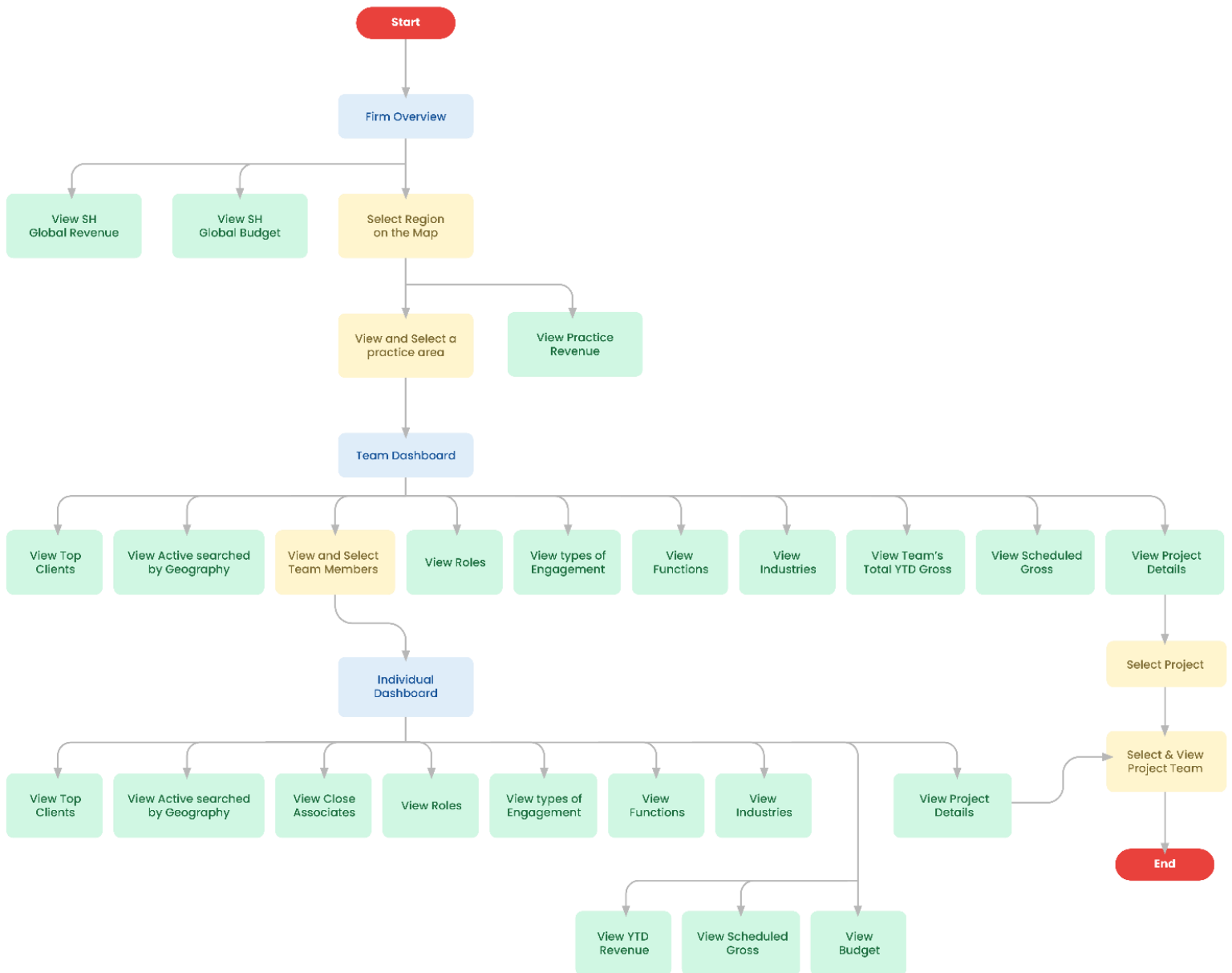
This card displays the project (Assignment) details in a tabular format.

Basic details of an assignment are displayed on this table.

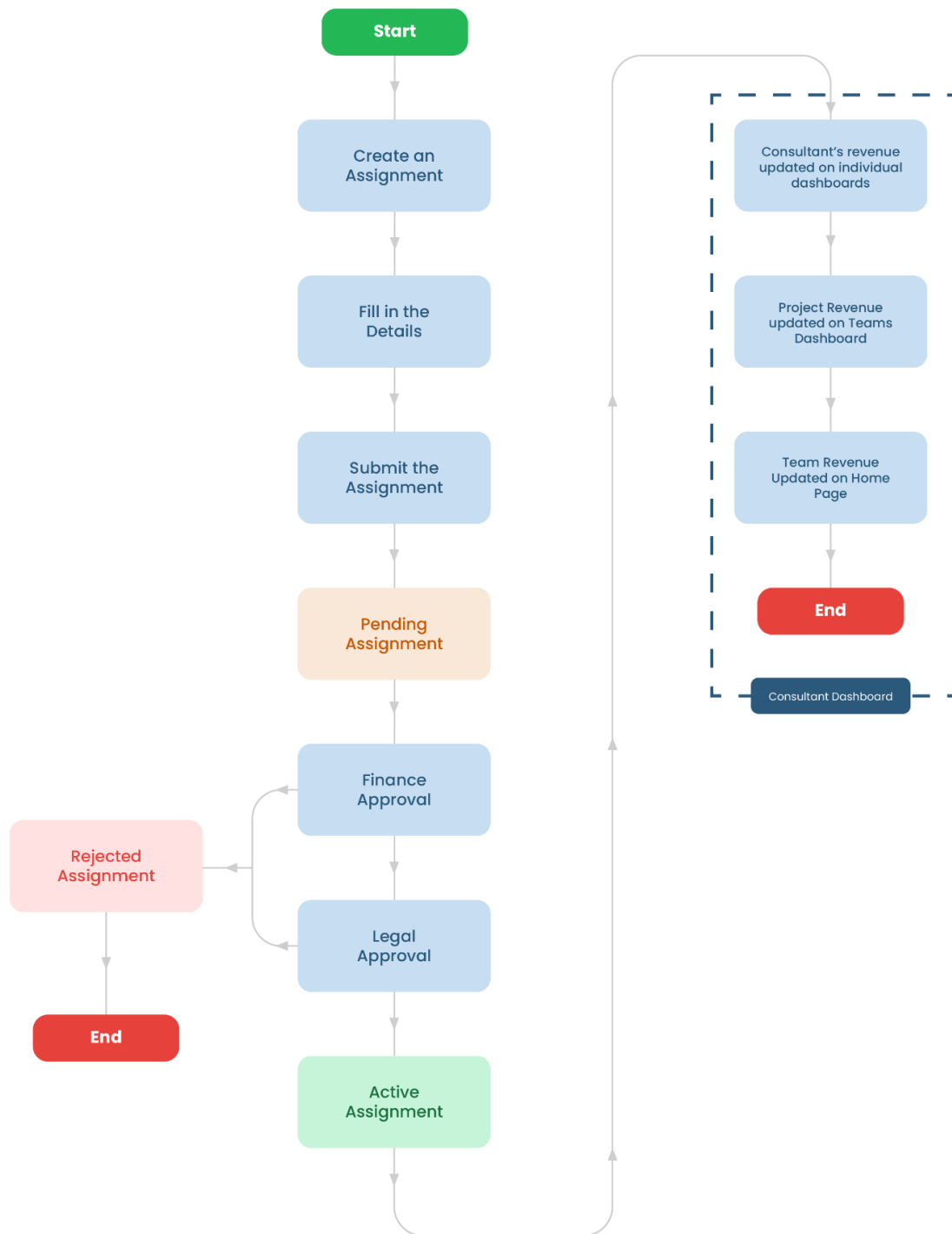
- viii. Position title
- ix. Company name
- x. Assignment status
- xi. Start date
- xii. Type of Engagement
- xiii. Industry
- xiv. YTD Gross

Users may click on the “+” icon to view the “Project Team” and the Scheduled Gross for a selected assignment.

How is it shown?



How it all works?



*Note that the Revenue values of the team dashboard is based on the sum of revenue values of all assignments for which the **main consultant handling** is a member of the team.

*Sum of individual revenue values may not be equal to the Team revenue since the individuals may involve with assignments outside of their team.

Have Questions or Concerns?

For any questions or concerns regarding the consultant dashboard, please contact any of the following personnel.

1. Rocky Bandara - r.bandara@sheffieldhaworth.com
2. Ben Pathirana - ben@fyxoinc.com
3. Thilini Ranasinghe - thilini@fyxoinc.com

End of Document
