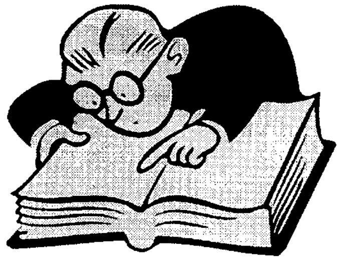

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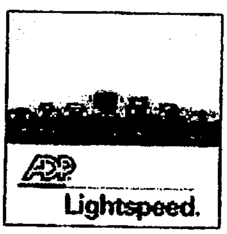

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ADP LIGHTSPEED: The Leader Across All Markets

ADP Lightspeed is no stranger to the automotive, heavy truck and powersports markets, where its software programs rank No. 1 in all three industries and have reigned there for years.

Now, backed by the powerful Automatic Data Processing Company, the LightspeedMarine dealer management system is quickly growing toward becoming the No. 1 provider in the marine industry, as well.

LightspeedMarine features five integrated modules to help you manage every element of your dealership more effectively and profitably.

With LightspeedMarine on deck, you'll be able to steer your business with more precision than ever before. The integrated modules include Comprehensive Sales and F&I Tools, Real-Time Accounting Functions, Complete Service Cycle Tracking, Automated Parts and Inventory Management and Unit Rental Management.

The Sales and F&I module enables dealers to track the entire process, without the hassle of manually calculating rates, terms and percentages. It will track the true cost of each item, including unit setup and installed options, protect sales margins and instantly calculate deal profitability.

In addition ADP Lightspeed provides a New Dealer Dashboard that will allow a user to customize their view of performance factors and track what is important to them and their department. For instance sales managers can pick out the specific performance indicators viewed as critical in managing their people and departments and easily view them at any time. The charts and graphs are real time and reflect actual transactions as they happen. The Dashboard makes it easy to know what is happening in the dealership right now, when it's most important.

Additionally, a full-functioning F&I module gives the dealership the ability to create graphically enhanced financing packages that are very customizable and can accommodate four different F&I packages which can be edited to the customer's needs with a simple drag and drop capability. ADP also offers menu selling, which is a great tool for showing customers their finance options in a

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clear and easy to understand view, saving time and getting on with the closing. ADP's F&I module is the easiest tool to get prospects from kicking tires to desking a deal and out the door. The F&I module will clearly show customers the value of a prepaid maintenance program, instantly calculate payments, predetermined by finance and insurance vendors, and print customized sales contracts instantly.

The Real-Time Accounting Functions module makes it a breeze to instantly flow daily transactions into the general accounting ledger, eliminating the time-consuming end-of-the-day journal postings. Since parent company ADP is the largest payroll provider in the world, LightspeedMarine also can offer a very adaptable solution for any payroll and human resource needs a dealership might have.

With these capabilities, a dealer can manage transaction data on sales, parts and service departments, organize each department as its own profit center, automatically track assets and liabilities, analyze departmental and overall dealership performance and track accounts payables and receivables as well as handle payroll.

For instance, take Scott Bailey, the controller of Taylor's Boats in Draper, Utah, a *Boating Industry* Top 100 Dealer, who will readily discuss his two years of experience with the LightspeedMarine program.

"It'll be two years next month (May)," explained Bailey. "It is the most user-friendly system I've ever worked with and it tracks everything. It's just phenomenal. We were part of LightspeedMarine's Beta test program with the software and we've seldom had a problem with it. And if we do, (ADP) Lightspeed can solve it either with one phone call or dial directly into our system and fix any problem or hitch immediately. Not only that, but (ADP) Lightspeed is continually seeking our suggestions, comments or how we think the program could become more beneficial to us. But, basically, we have everything we need and if there are any updates to it, they do it immediately.

"As the controller here at Taylor's Boats, I spend virtually all day on the system and after being on it for a couple of years now, in my opinion, it's a flat-out 10 on a scale of 1 to 10. Not only that, but it's also about 30-percent cheaper than other programs that are available out there. But LightspeedMarine's just a better program than you'll find anywhere in our business."

Additionally, LightspeedMarine offers the Complete Service Cycle Tracking module, which creates accurate repair orders, service history on any unit and also tracks technician efficiency on every job. Service jobs and appointments can now be easily tracked with our New Service Scheduling application. With its completely automated service department, a dealer can measure productivity, create accurate repair orders, track warranty claims and, most important, enhance customer service.

The Automated Parts and Inventory Management module can manage every point-of-sale transaction while continually tracking all parts and customer purchases. With an automated parts department, a dealer can more easily boost inventory profits, expedite service and track customer and unit data on an on-going basis.

LightspeedMarine's Unit Rental Management system allows a dealer to quickly view availability of rental units such as boats, personal watercraft and trailers; manage reservations and occupancy; use a graphical view of one's slips and/or storage areas to manage space rentals; track customer and unit information; customize and print contracts and choose from a wide variety of standard and custom reports to track waiting lists, customer deposits, billings, finance charges and more.

ADP Lightspeed, perhaps because it listens to its client dealers on a regular basis and is aggressively geared toward growth of its marketshare, updates its systems three or four times per year to better accommodate the dealers' changing needs.

For more information about ADP Lightspeed and its offerings, call 800/521-0309 (toll free) or 801/521-0300. Additional information is also available on the Web at www.adplightspeed.com.

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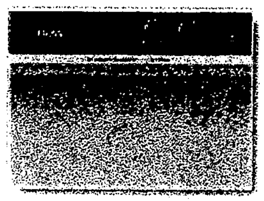

Portal Entry Page

Karastan needed a secure way to effectively and efficiently communicate with their four distinct US dealer networks. Here is some of the information they need to communicate:

- **Price Lists** and **Price Tags**
- **Merchandising** and **Display information**
- **Marketing** and **Promotions Calendars**
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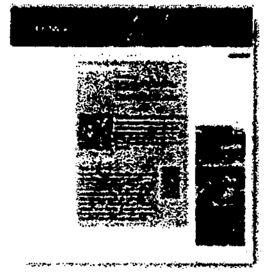

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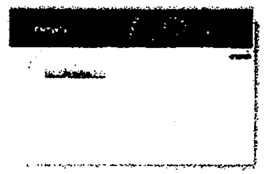

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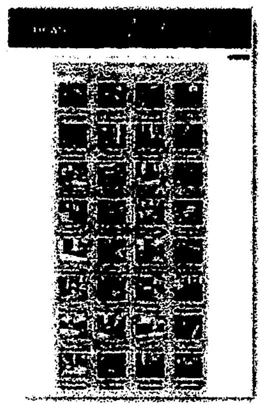

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Each dealer "Rep Group" needed it's own site so first we designed a **portal "entry" page**. All of the dealers go to www.repnews.com to log in and select their respective dashboard. Just like a car dashboard delivers critical information to the driver (i.e. speed, gear, lights, gas temperature etc.) Each dealer **Dashboard** delivers all the current and important information at a glance. (i.e. newest documents, announcements, calendars, links etc.)

As new documents, events and announcements are added to the sites the information is automatically posted to the dashboards making it easy for the dealers to stay informed and access files.

SharePoint has provided Karastan a secure online environment that is easy to navigate, can be accessed from any computer 24/7 and is almost effortless to maintain and manage.

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Summary Report
The summary report will provide you with an even greater snapshot of your business than the dashboard. It provides reporting with benchmarks to state and national results.

Diary
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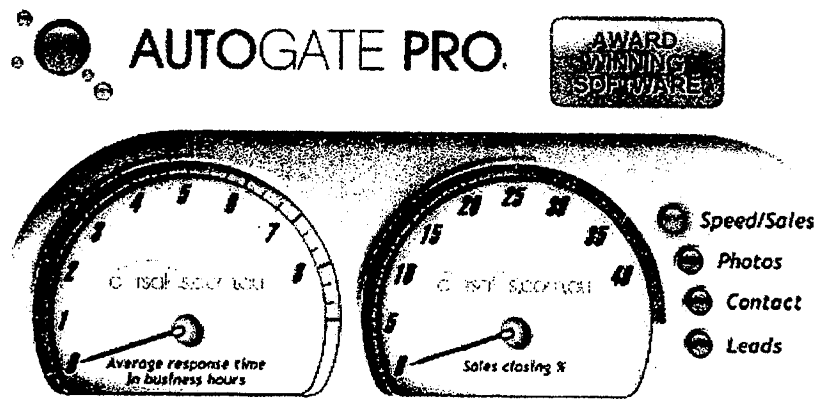

The Dealer Dashboard appears in your home page when you login to Autogate Pro. It provides a real time snapshot of the performance of your business. The dashboard gauges are clearly marked, with green indicating the ideal performance range. Using Autogate, you can ensure your dealership operates â€œin the green,â€ maximising your return on investment.

With Autogate Pro you can capture and manage all your leads - from carsales.com.au, your own dealer website, and all other Internet providers - in one location.

More Than Just Internet Leads
Autogate Pro is not just for Internet leads. All customers, including phone-ins, walk-ins and referrals, can be managed in this user-friendly application. You can even upload your existing customer data.

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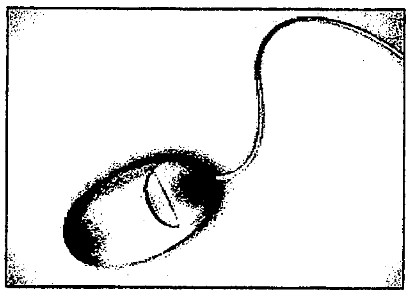

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New RVTraderOnline.com Breaks Weekly Visitor Record

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RV Trader Marketing
(757) 351-8640
jerald.motil@dominionenterprises.com

Norfolk, VA - February 19, 2008

RV Trader, a division of Dominion Enterprises, announced today record-breaking traffic on RVTraderOnline.com during the week of Feb. 11.

RVTraderOnline.com hosted 206,722 visitors between Feb. 11 and Feb. 17, 2008—up more than 48% over the same week in 2007 - according to Omniture SiteCatalyst HBX.

"As our Web site traffic continues to set new records, the new site design continues to prove its value. We look forward to offering more and more consumers access to the Internet's largest database of recreational vehicles," said Tim Custer, general manager of Dominion Enterprises' RV brand. "Particularly in light of slowing RV shipments, according to the Recreation Vehicle Industry Association, RVTraderOnline.com's growth is a welcome sign that RV buyers are still looking to buy," continued Custer.

Upcoming improvements to RVTraderOnline.com include more exposure for RV dealers in the site's Behind the Wheel consumer e-newsletter and on the RV Insider Blog.

Re-launched in November 2007, the Web site offers RV dealers a completely redesigned Inventory Management Tool (IMT) and Instant

Mobile Lead Alert. Also new for RV dealers is the Dealer Dashboard e-newsletter. Delivered directly to advertisers' inboxes every month, it offers tips on how to drive more business to the dealership and how to more effectively leverage the RVTraderOnline.com selling tools.

Three main buttons, "Find," "Sell" and "Research," take visitors directly to the information they seek. The "Find" button provides instant access to more than 81,000 RVs for sale - the Internet's largest database of recreational vehicles. The "Research" button offers additional information on everything from finance and insurance to RV parts and accessories.

About RVTraderOnline.com
RVTraderOnline.com, a division of Dominion Enterprises, is the largest database of recreational vehicles for sale online. Headquartered in Norfolk, Va., it is part of the Trader family of online vehicle classified advertising sites that includes BoatTrader.com, CycleTrader.com, AeroTrader.com, EquipmentTraderOnline.com and CommericalTruckTrader.com. For more information about RVTraderOnline.com, call toll-free 1-888-813-7304 or visit http://www.RVTraderOnline.com

About Dominion Enterprises
Dominion Enterprises, Norfolk, Va., is a leading media and information services company serving recreation, employment, automotive, real estate, marine and industrial markets. The company has more than 500 magazine titles, over 40 market-leading Web sites, and operates a variety of Web and technology businesses. The company had 2006 annual revenue of more than $850 million and has more than 7,200 employees nationwide. For more information, visit www.DominionEnterprises.com

H-001355

The Dashboard Spy

March 5, 2006

An auto dealer sales management dashboard

Filed under: Dashboard Screenshots — dashboardspy @ 2:54 am

This sales dashboard rovides users with real-time financial information about their Sales, F&I, Fixed Operations, Accounting and Inventory profit centers. PDFs available at http://www.dealerdna.com/pages/sales.html

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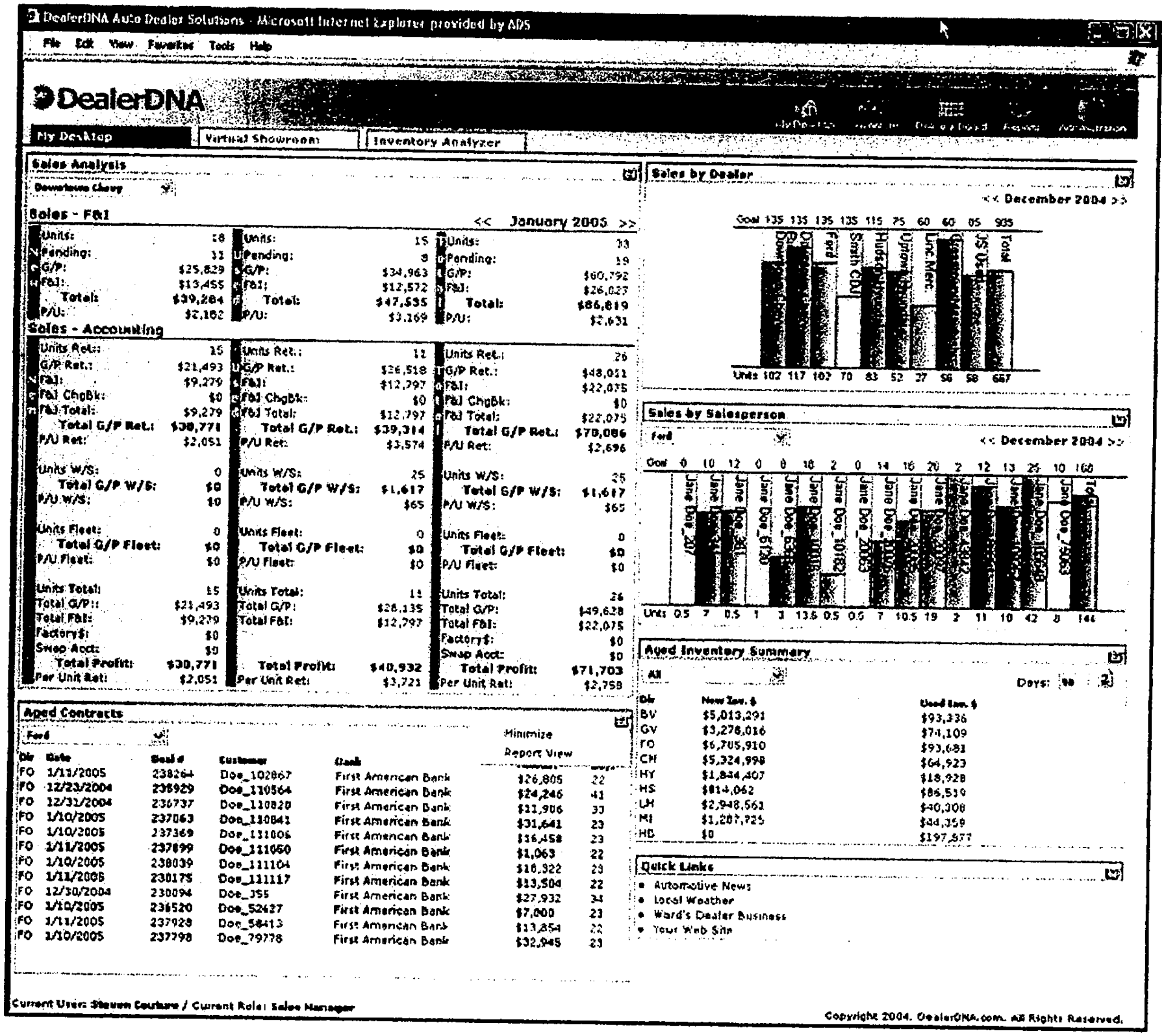

So what or who is The Dashboard Spy? As his about page states, The Dashboard Spy is just a guy interested in the design of business

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dashboards. He could not find any executive dashboard design source books and so set about creating his own. Finally convinced to post his extensive collection of dashboard screenshots online, he was amazed to find how popular it has become. If you have a nice screenshot to share, please leave a comment or send an email to info _at_ dashboardspy.com. Also check out The Dashboard Spy's favorite books.

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- ## Executive Dashboards

Looking for examples of **Executive Dashboards**? The Dashboard Spy collection of executive dashboard screenshots has moved to this link: **Dashboard**. At http://www.enterprise-dashboard.com, you can study the best practices of over 837 dashboard screenshots!

The Dashboard Spy

Welcome to The Dashboard Spy - a collection of executive dashboard screenshots. This reference work is proudly offered as a source book to everyone involved in executive dashboard design and implementation. May it spur plenty of ideas and lead to a successful executive dashboard, scorecard or business intelligence project.

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- ## What is a Dashboard?

Known by many names (enterprise dashboard, executive dashboard, digital dashboard, business dashboard, business intelligence dashboard, performance dashboard, balanced scorecard, kpi summary, data visualization, and so on...), it is basically a way for business users to get an at-a-glance understanding of metrics of importance to them. In addition to acting as a summarization device, the dashboard also serves to highlight specific data and allows the user to drill down and inspect specific items. It allows a browsing style of user interaction in addition to the usual menu based navigation. As such, the dashboard also represents a user interface design pattern that designers should study and understand. From the perspective of information technology staff, the dashboard often represents a consolidation of data from disparate data sources. The effort is usually considerable when it comes to the necessary extraction, transformation and presentation of the data.

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Calendar

March 2006

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Using Siebel Dealer Dashboards (Dealer)

Siebel Dealer provides dealer employees with dashboards that allow them to view the most important information that they need for their work on one screen. The following dashboards are available:

- **Sales Consultant Dashboard.** Includes actual and goal unit sales, today's activities, my calendar, current opportunities, and my promotions.
- **Sales Manager Dashboard.** Includes actual and goal unit sales for team, today's activities, my calendar, current opportunities, team's promotions, and team's calendar.
- **Service Employee Dashboard.** Includes today's activities, my calendar, my promotions, and current service requests.
- **Service Manager Dashboard.** Includes today's activities, my calendar, store promotions, and current service requests for team.
- **Store Dashboard.** Includes actual and goal unit sales for store, today's activities, my calendar, current opportunities, team's promotions, and team's calendar. To be used by the store general manager.

Some of the applets on the dashboards display daily data, and some display monthly data. In addition, the calendar can display data for the day, week, or month.

- **Daily data.** The following applets display data for the current day:
  - Today's Activities. Displays all of the employee's activities for the current day. The first column lists activities that have a due date of today and are not done. The second column lists activities that have a due date of before today and are not done; it continues to display past-due activities for the number of days defined in Dealer Preference view, as described in Entering Dealer Preferences (Dealer).

    NOTE: The Today's Activities only displays certain types of activities, as described in Changing Types of Activities Displayed in the Dealer Dashboard.
  - Current Opportunities. Displays all current opportunities for this consultant where there is no activity or there has been activity in the last 15 days. This is based on the value in the Last Activity Date in the Opportunity view of the Contacts screen. Whenever you make any change to an opportunity, this field is updated.
  - My Promotions, Team's Promotions, or Store Promotions. Displays all promotions that are active on the current day. Promotions are displayed if their campaign is not completed, and the creation date is within 30 days of today's date, and today is between the start date and end date of the campaign.
  - Team's Calendar (Today). Available to sales managers and store manager only. Gives the managers a view of the calendars of all their reports for the current day. The manager can also click the left arrow or right arrow to view their reports' calendars for previous or later days.
- **Monthly data.** The following applet displays data for the current month:

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- Unit Sales. Displays the actual sales and sales goals for the current month for fleet, new retail and used retail sales. On the sales consultant dashboard, it displays the actual sales and sales goals for that individual sales consultant. On the sales manager dashboard, it displays the actual sales and sales goals for the manager's team. All these sales goals are based on the monthly forecast, described in Process of Creating the Monthly Forecast (Dealer). Actual data is based on the Service History view.
- **Calendar.** Provides a complete calendar for creating and tracking appointments and other activities. Employees can display and use a daily, weekly, or monthly calendar.

To use Dealer dashboards

1. Navigate to the Dashboard screen.
2. From the Show drop-down list, select:
   - Sales Consultant Dashboard
   - Sales Manager Dashboard
   - Service Employee Dashboard
   - Service Manager Dashboard
   - Store Dashboard

   NOTE: Employees can only select the view that is appropriate to them. For example, a sales consultant does not have the sales manager view available.

   The dashboards display the most important information needed by these employees, in summary form.
3. Sales managers can refresh the data in the dashboard by clicking Refresh. Sales consultants' data is refreshed periodically, based on the refresh interval set in Dealer Preference view, as described in Entering Dealer Preferences (Dealer).

   The Update field in the Unit Sales and Activities applets shows the last time that the data was refreshed.
4. To view more complete information, click the heading above any of the applets in the dashboard.

   The appropriate screen appears, with more complete information.

Siebel Dealer Administration Guide

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Dashboards By Example Volume I

What's on your Dashboard?

Welcome to the definitive collection of BI Dashboards - where you and your work are the stars. No sales pitches, useless theory or big egos - just real-life dashboard project teams and their dashboards. Dedicated to keeping BI real!

Part of the Dashboard Spy Network

Business dashboard users, data visualization experts, IT teams, & executive management - Welcome to Volume 1 of **Dashboards By Example**! Please send in your dashboards!

Where to start your study of BI Dashboard Best Practices? Use this Dashboards by Example sitemap link:

Dashboard

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Dashboard

From a simple excel dashboard to a fully integrated enterprise reporting suite, the **Business Dashboard** is being quickly adopted as the new face of Business Intelligence. It has a rapidly growing role in BI reporting and analysis.

An enterprise dashboard allows at-a-glance visualization of company health and monitoring of key performance indicators. Simple to understand and high in ROI, these executive dashboards are becoming "must-haves" for all enterprises. Easy-to-use by business users and fun-to-implement by the IT department, BI dashboard projects are quickly funded and politically popular.

Dashboards by Example Sponsors

Business Intelligence Dashboard Vendors to check out:

"Dashboards by Example" is a business intelligence blog dedicated to showing you actual examples of do's and don'ts of dashboard design. Study examples of enterprise dashboards, scorecards and other business intelligence interfaces implemented by the world's top organizations.

Looking for a particular dashboard? Try these listings of BI dashboards (call them what you want):

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- Dashboard Page 5
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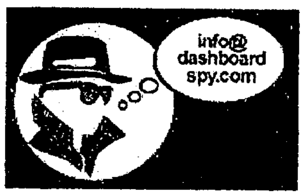
This dashboard screenshot blog is part of the Dashboard Spy network - a unique collection of business intelligence resources. Send us your Dashboards!



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« Golf Swing Dashboard - Distance Optimization using Crystal Xcelsius
Marine Terminal Dashboard - Yard Operations Monitoring »

Equipment Dealer Dashboard - An Enterprise Dashboard for Dealership Sales Management

Sales Management Dashboards

Dealership management dashboards is the topic of today's post on The Dashboard Spy. Here we have a screenshot of PFW Systems Corp's IntelliDealer Dashboard. Obviously, sales performance is the prime focus, but there is significant attention paid to less obvious but much needed metrics. For example, we start with a list of Recent Equipment Lost Sales. To me, this is the right approach to sales management. Let's first answer the question of why we lost a sale so that we can get on the right track. Below the dashboard screenshot is a very helpful list of sales related KPI metrics.

Updated: This post is being updated as we have been studying sales management dashboards and these particular screenshots have generated quite a bit of interest.

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Customize Page

IntelliDealer User

Change Location? 01/01/01 - Guelph

Click here to update your profile.

Recent Equipment Lost Sales

Date	Make	Model	Customer	Stock Number	Competitor	Reason	Competitor Price
04/22/2005	DEERE	310G	Morrison Construction Pat Morrison	?	RJ EQUIP DEERE 310G	AVAIL	0

Top Unit Sales Territories - All Locations

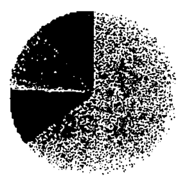
Territory	Amount
Northwest	716,884
Upper Thames	347,960
Southeast	300,942
Oxford County	144,328
Harvey County	139,217
Melvin County	28,300
Total:	**1,677,631**

Inventory Aging - All Locations

Months Old	Units	Amount
0 - 6	104	39,871,851
7 - 12	148	1,487,835
13 - 18	291	4,694,516
19 - 24	115	1,336,054
25 - 36	143	2,007,128
Over 36	257	581,776
Total:	**1,058**	**49,979,163**

MTD Sales - All Locations

	Amount	%
Equipment	246,058	65.0
Parts Invoicing	41,509	11.0
General	3,720	1.0
Rental	5,290	1.4
Shop Labor	39,107	10.3
Shop Parts	43,005	11.4
Total	378,689	



Top Equipment Salespeople - All Locations

Salesperson	Amount
Mike Jones	793,861
Jerry Ort	253,397
Edgar Horton	160,610
James Kravitz	150,020
Lenny Michaels	105,465
Andy Miller	100,608
Fred Falworth	99,751
Teresa Blanton	83,266
Allan Thompson	80,119
Kyle Clarkson	64,100

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Current Executive Summary Views

(Sales-related views shown in light blue)

Financial
Total A/R
Highest A/R Over 120
Total A/P
Yesterday's Sales
Top Customer Purchasers YTD
MTD Sales
YTD Sales
Last Year MTD Sales
Last Year YTD Sales
Financial Reports

Service
Aged Work In Process
Open Requisitions

Other
Canadian Weather
Employee's Birthday
Today's Calls
User Links

Equipment
Recent Equipment Lost Sales
Top Equipment Buyers
Top Equipment Salespeople
Next Equipment Notes Due
MTD/YTD Equipment Sales
5 Year Monthly Equipment Sales (in 1000s)
Last 10 Units Sold
Inventory Summary
Used Inventory by Hours
Top Inventory $ by Group
Inventory Aging
Top Unit Sales Territories
Top Buyers Last Year
Top Unit Salespeople LYR

Parts
Top Parts Sold YTD
Sales Order Aging

Tags: Sales Dashboards, Management Dashboard

Homework: If you work with the sales department and want to speak intelligently about forecasting sales, take a look at Sales Forecasting Management: Understanding the Techniques, Systems and Management of the Sales Forecasting Process.

So what or who is The Dashboard Spy? As his about page states, The Dashboard Spy is just a guy interested in the design of enterprise dashboards. He could not find any executive dashboard design source books (or even screenshots of real business dashboards) and so set about creating his own. Finally convinced to post his extensive collection of dashboard screenshots online, he was amazed to find how popular it has become. If you have a nice screenshot of a digital dashboard, balanced scorecard, or any business intelligence graphic to share,

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please send an email to info _at_ dashboardspy.com. Also check out The Dashboard Spy's favorite books on business dashboards.

PS: If you find yourself part of an enterprise dashboard effort, you must study Enterprise Dashboards: Design and Best Practices for IT, the only book on actually implementing enterprise dashboards.

ShareThis

Was this enterprise dashboard interesting enough to share? Help spread the news about **Dashboards By Example**. Click on the "Share" icon above to submit this post to your social bookmark service or email the link to a fellow dashboarder or even yourself.

Dashboard Spy Readers: See these related Business Intelligence Dashboard posts:

- An auto dealer sales management dashboard...
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- Sales Channel Management Dashboards...

Business Intelligence Dashboard Books

Gift Ideas for Your Fellow Dashboard and Business Intelligence Professionals. Preview them at no charge:

Latest posts of interest to the business intelligence dashboarding community - Have you read these recent enterprise dashboard posts?

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Last Modified: Friday, October 12th, 2007 @ 14:19

This business intelligence dashboard blog entry was posted on Wednesday, August 9th, 2006 at 12:28 pm and is filed under Dashboard Screenshots. You can follow any responses to this entry through the RSS 2.0 feed. You can leave a response, or trackback from your own site.

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More Dashboards

Dashboards by Example Volume 1 Goals and Objectives

"**Dashboards By Example - BI Dashboard Samples**" is the theme and mission statement of this blog. We salute the Dashboard Spy in the field - those business users, project managers, IT executives, application designers, business intelligence experts, analysts, coders and subject matter experts who are on site creating this exciting and new "face of BI". Your business intelligence dashboard can go by many names - performance dashboard, executive dashboard, business dashboard, balanced scorecard, KPI metric summary, enterprise dashboard, bi dashboard, corporate dashboard. Whatever we call it, we believe that the at-a-glance visual approach is the key to user-centric design. Let's learn from each other's dashboard examples and continue to increase the level of usability and usefulness.

We strongly believe that the more dashboards you study, the more adept you will become at choosing correct design solutions for your company. "Learn by Example" is not just a motto - we take it literally, hence the name "Dashboards by Example". So take every chance you get to view examples of BI interfaces. As a matter of fact, take a second now, and study this dashboard example.

What's on your Dashboard?

The Dashboard Spy wants your dashboards!! I've collected over 1000 screenshots of business intelligence dashboards and scorecards for Volume 1 and now need you to send me the next 1000 dashboards for Volume 2. Email me at info at dashboardspy.com and tell me about your dashboard. Send me images, notes, technical details, business rules, metrics, KPIs, anything that you think your fellow Dashboard Spies will have an interest in. Keep this library of dashboarding resources going!

Also, I'd love more links to both the main Dashboard Spy site at http://dashboardspy.com and the Volume 1 blog of 1000 dashboards at http://www.enterprise-dashboard.com. I'd love your help in making these resources better known.

Looking forward to seeing your dashboards, The Dashboard Spy

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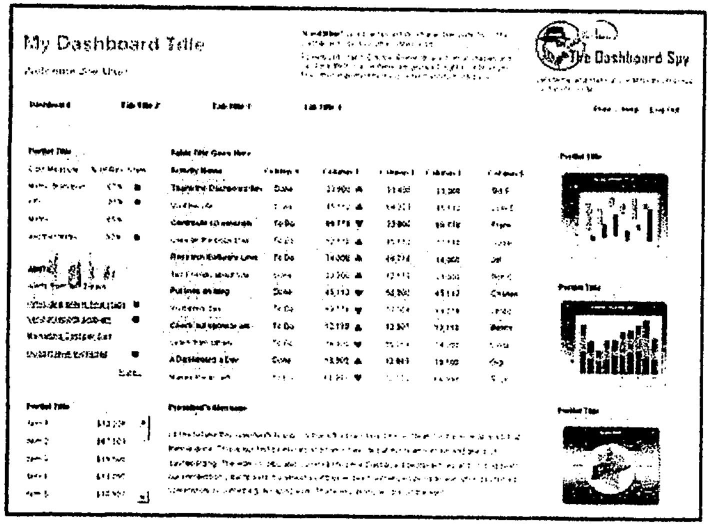
The Dashboard Spy Blog On Enterprise Dashboards

P.S. Did you check out this free dashboard template for wireframing? Click on the image below for the download link and instructions. Consider it a gift for your unfailing support. Thank you very much. Sincerely, your friend in dashboarding, Dash.



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CLOSING THE LOOP
on customer service

Line SOLUTIONS

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Dealer Dashboard

IF YOU CAN'T MEASURE IT, CAN'T MANAGE IT

Dealer Dashboard Key Performance Indicators (KPI's) provide the dealer and service manager with visibility to the crucial numbers that drive the performance of the sirvice Department. You have the ability to set target goals for the average labor dollars per repair order, one line work order percentages and average hours per repair order and see the results by year, month, week or day. By comparing it to the prior year's results, you have visibility to improvements in your department and more importantly areas of concern.

By using our secure data extraction portal we provide daily updating on Labor sales, Repair order counts and total hours sold for all sales categrories

The dealer Report allows you to graph the KPI's by pay type and reporting period to identify trends and areas of opportunity

Advisor and Technician Scorecards

- provide KPI information specific to the Advisor and Technician by pay type and specified time periods
- Graphic display of achieved labor hours per repair order to goal and to previous years

The Advisor Report

The advisor report compar performance based on:

- Total repair orders written
- Total number of Jobs
- Jobs per Repair Order
- Labor Hours sold

The Technician Report

The advisor report compar performance based on:

- Repair orders worked on
- Jobs per repair order

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performance.

- Allows for goal setting based on the number of repair orders for cross sell categories
- Displays sell through rate of cross sell opportunities and compares performance to set goals
- Provides year to date summary totals for all categories
- Printable copy for each staff member

- Labor hours per repair order
(billed hours per repair order)
- Total labor hours
- Tech hours per Repair Order
(paid hours per repair order)
- Dollars per repair order
- Total labor generated

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DENON CANADA

DENON PRODUCTS EXPLORE DENON EXPERIENCE DENON OWNERS ABOUT US

DENON

DEALER

DASHBOARD

The Dealer Dashboard is the easiest way for Denon dealers to get the latest information on Denon products, events, company information and more. As a Denon dealer, the Dashboard provides you with all kinds of product related items such as downloads, images, sell sheets, and more.

DEALER DASHBOARD LOG-IN

PASSWORD PERFORMANCE

Stay up to date on all things related to your product.

Does your product need service? We have several authorized service centers in the U.S. that can assist you

Get the latest updates, downloads, and user manuals for your product.

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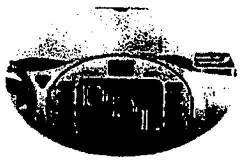
Dashboard Dealership Enterprises



"A Leader in Reporting Solutions for Auto Dealers"

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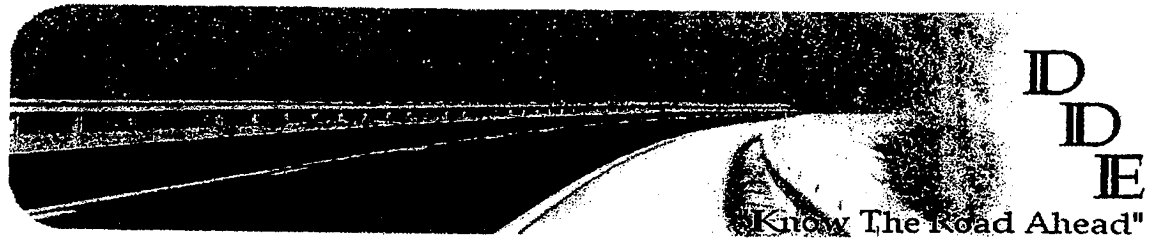

Products

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Dashboard provides clients with a vast array of online reporting systems. Choose from our list of products to learn more.

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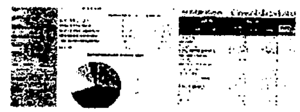
DIXON HUGHES



Services

Dashboard leads the Automotive Industry in custom enterprise level reporting solutions. Many of the nation's most profitable Dealer Groups are our clients.

Our solutions are affordable, professional, and come with the best support team in the business.

Company Info

Dashboard is the market leader in Web management solutions for auto dealers. Dashboard rapidly develops high quality system products and related services to satisfy the current and emerging needs of our customers. Our mission is to exceed customer expectations for service, quality, speed of implementation, ease of use and support.

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THE marantz DEALER DASHBOARD

Welcome to the Marantz Dealer Dashboard!

The Dealer Dashboard is the easiest way for Marantz dealers to get the latest information on Marantz products, events, company information and more. As a Marantz dealer, the Dashboard provides you with all kinds of product related items such as high resolution images, sell sheets, and corporate identity images.

To access the Dashboard, Marantz dealers should use their Dealer Dashboard password below:

Password Required: Submit

If you have trouble logging in, please send an email to: weberrors@marantz.com

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FIND AN AUTHORIZED DEALER OR DISTRIBUTOR ›

Home / Dealer Dashboard

McIntosh®

DEALER DASHBOARD

WELCOME TO THE MCINTOSH DEALER DASHBOARD

Under Construction. Please be patient while we upgrade.

Dealer Login

Username: McIntosh

Password: Dealer

Forgot your password? LOG-IN

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Dealer Dashboard

Subaru Australia Drives Dealer Productivity Via Plumtree-Powered Dashboard

SAN FRANCISCO -- Plumtree Portal Helps Workload Management for Dealers, Streamlines Communications and Provides Tools to Improve Customer Satisfaction

Plumtree Software (Nasdaq:PLUM) today announced that Subaru Australia has deployed a dashboard application built using the Plumtree Enterprise Web Suite to its network of 92 dealers across Australia. The dealer dashboard has streamlined communication between Subaru and its dealer network so that each dealer has direct access to the latest metrics such as inventory, order status and promotional details. As a result, dealers are able to target improved customer service, while effectively representing the Subaru brand.

"The dealer dashboard in the portal has been a huge win for Subaru Australia because it gives dealers a central point of reference for key metrics and trends that they couldn't see before," said Gary Watson, national sales manager at Subaru.

Dealers clamored to test the dashboard, which went live in May 2004 after six months of development, and have been highly satisfied with the results. "Dealers used to ring our business managers every day asking for access to simple metrics like how many cars have been in inventory over 60 days. They need this information because they're measured, and paid on it, but there was no easy way for them to access it themselves," Watson said. "Now that the dashboard is in place, those types of calls have been replaced by requests for even more dashboard functionality."

What's in Subaru's Dealer Dashboard?

Subaru manufactures and imports its cars from Japan, covering the Forester, Impreza, Liberty and Outback models, which total approximately 30,000 units of sales annually. Australia is the company's third-largest market in the world, after Japan and the U.S. The Australian operation performs marketing and distribution functions, maintains supplies of spare parts and also sustains relationships with dealers across Australia.

To support the activities of the local Subaru operation, Subaru deployed a dealer dashboard that offers dealers access to the following information, much of which is drawn from a less accessible AS/400 system:

--Sales: reports on vehicle sales figures;

--Orders: lists of current orders for parts and vehicles or other items, status of cars in the dealership and delivery dates, and full detail of each dealers supply chain, from order to delivery;

--Inventory: data on spare parts and new vehicles;

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--Marketing: promotional details including model specifications, feature comparisons and pricing guides;

--Services: details on services such as warranties;

--Branding: guidelines for promoting Subaru's brand;

--Calendar: calendar of sales appointments shared with Subaru employees; and

--Communications: Dealer bulletins and program information.

Previously, the company communicated with dealers in three separate lines of business: spare parts, services and sales. Each of these relationships was managed by different employees. By consolidating the three lines of business information targeted at dealers through one central dealer dashboard, information is presented in a way that allows dealers to "pull" access at any time convenient to them. This helps the dealers spend more time on planning and management, and reinforces the professionalism of the Subaru brand.

In addition to dealer satisfaction, customer satisfaction has also been targeted for improvement using the dealer dashboard. "Customers are anxious to know when their new car will arrive -- especially if they custom ordered it to meet their exact tastes," said Watson. "Using the dashboard in the portal gives the dealers better visibility into our production and delivery timelines, which makes for happy customers."

"Over 60% of Plumtree customers deploy dashboards in their portals to arm employees with critical business data for acting quickly and effectively," said Dean Stockwell, general manager, Asia Pacific at Plumtree Software. "Subaru's dealer dashboard is a great example of this and shows how quickly a dashboard can deliver value, with timelines measured in months, not years."

About Plumtree Software

Plumtree Software is a global pioneer in creating advanced software environments where information resources work together with human ingenuity. Well established as the portal thought leader, Plumtree enables a full, rich suite of applications that coordinate human-managed activities across systems, processes and business boundaries. With its flexible and open portal system, Plumtree delivers smart solutions throughout the enterprise and beyond. Progressive enterprises large and small, like Airbus, Mazda, Pratt & Whitney and the U.S. Navy depend on Plumtree to help them rapidly harness untapped potential in their organizations. For more information, visit www.plumtree.com.

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Visit www.furnishweb.com to find out more.

Thursday, April 3, 2008

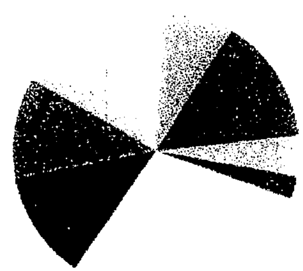
Release 3.0.6 - Dealer Sales History and Analysis

Dealer Sales History and Analysis

We are very pleased to announce a new version of FurnishWEB launching just a few weeks after our last release and just in time for the High Point Furniture Market. FurnishWEB now has screens for Dealer Sales Analysis! This type of reporting has been one of the top requests from our clients and their users. We're are very glad to meet these requests and provide yet more value to our customers.

FurnishWEB accumulates and summarizes invoice sales information by customer and product for sales analysis and reporting. We've taken this summarized data and provided several online tools creating a more meaningful understanding of each dealer's sales history.

Collections YTD



Dealer Dashboard Updates
On the Dealer Dashboard there are two new pieces of information; Collections Year-To-Date (YTD) and Top Sellers YTD. The Collections pie chart displays the collections a dealer has purchased most in the current year. The Top Sellers lists the top 10 products the dealer purchased this year.

Categories

In the News (10)
New Releases (8)
Tips and Tricks (4)
Thoughts and Ramblings (3)
Furniture Market (2)

Blog Archive

▼ 2008 (6)
▼ April (2)
It would be great if FurnishWEB emailed acknowledg...
Release 3.0.6 - Dealer Sales History and Analysis
► March (2)
► February (2)
► 2007 (23)
► 2006 (2)

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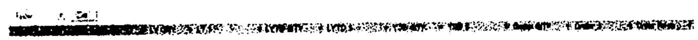
Furnishweb Users

H-001389

Dealer Sales Tools

There is also a new link on the Dealer Dashboard to Sales Tools. Sales Tools is deceptively simple but this link conceals some real power! Sales Tools is an interactive, sortable summary of sales information. Sales history can be summarized by product, collection, type, family, class and finish ... each column is sortable providing the ability to find the Best Sellers in each category.

Sales reps should find this area especially useful when preparing a visit with the dealer. We anticipate this tool to quickly become some of the most used web pages in FurnishWEB!



This page shows you:

- LY $: All Last Year Sales
- LY QTY : All Last Year Quantities
- LYTD $: Last Year to Date Sales
- LYTD QTY: Last Year to Date Quantities
- YTD $: Current Year to Date Sales
- YTD QTY : Current Year to Date Quantities
- Order $: Current Backlog Order Dollar Amount
- Order QTY : Current Backlog Order Quantites
- Order Price : Minimum Price Paid for Product on Open Order

Other Patches and Fixes

With this release we've also included some minor improvements based on user feedback. There are now links to the Collection, Finish, Family, Class and Types while viewing a Product Detail. This will allow a quick return to the product list for those categories.

We've collapsed the Shipto Locations on the Dealer dashboard so they don't fill up

A-America

Bassett Mirror

Bradington-Young

Creations

Intercon

Ligna

Ligo Products Inc.

Pulaski Furniture

Rivers Edge Furniture

Samuel Lawrence Furniture

Sitcom

Somerton Home Furnishings

Westwood Design

Furniture Industry

Furniture Today

High Point Market

Inside Furniture Blog

Las Vegas Market

Feed

Subscribe in a reader

H-001390

so much screen space and opens up space for the new Sales Analysis charts. The user can reveal the list of Shipto locations by clicking on the Shipto Bar.

Thanks to all of the sales managers, customer service reps, sales reps, and buyers that use FurnishWEB. We hope these new features will help you provide better service and do your jobs more efficiently.

Posted by Jeff at 10:53 AM

Labels: New Releases

0 comments:

Post a Comment

Links to this post

Create a Link

Newer Post Home Older Post

Subscribe to: Post Comments (Atom)

H-001391

Affidavit of Michael Dalton
In Response
To
Opposer's First Set of Interrogatories

I, Michael Dalton, being duly sworn and cautioned state as follows:

As to:

1.) Applicant is involved in consulting, sales, services, training, financing, merchandising and VAR for various firms in the retail, wholesale, sector and owns and operates a website DealerDashboard.com aimed toward the automotive consumer, automotive trade industry, independent dealer and manufacture franchise dealer.

2.) Michael Dalton, beginning unknown to current.
Thomas-Michael Agency aprox; 1/90 to current.
DealerDashboard.com aprox; 10/99 to current.
PO Box 18137, Cincinnati, Ohio 45218-0137

3.) Applicant has no employees.

4.) Advisory, Consulting, training, website services which are tailored to each specific customer. A DealerDashboard Dealer to Dealer (D2D) online auction which includes services for dealers to monitor the return on investment (ROI), cost of goods sold concerning their sales, service and parts department investment in per. unit vehicle sold or inventoried (http://dealerdashboard.com/auctioninfo.html). Floor plan, retail, wholesale, financing and services for automotive dealers to identify their inventory financed and the cost of goods financed via. individualized web enabled tracking system

DEPOSITION EXHIBIT
Dalton
5-5-08

acting as agent for lenders (currently (DSC) Dealer Services Corp). (http://dealerdashboard.com/dsc.html). Applicant provides a web site (http://DealerDashboard.com) for consumers and trade to shop for all things automotive via. reciprocal links, affiliate links, and URL opt-in posting. Additionally, applicant provides co-branded email services (http://dealerdashboard.mail.everyone.net/email/scripts/loginuser.pl), co-branded auto shopping (http://www.autoworld.com/partner.asp?p=dealerdashboard) and co-branded target marketing services (http://findmorebuyers.com/page.cfm/3?4187) as agent or affiliate marketer.

5.) 10/05/1999

6.) Domain name, web site portal, dealer services and financing, consulting, training, Dealer to Dealer online auction, management services and providing automotive dealerships managerial information concerning their sales, service, and parts department key financial indicators of how their dealership is performing and providing a web site featuring information about automotive dealerships, automobiles, automotive parts and accessories, at which users can link to the retail or wholesale sites of others.

7.) Michael Dalton

8.) The Internet was in its infancy. The applicant was involved in ground floor automotive Internet development. The applicant wanted to provide a one-stop shop for dealers and consumers to engage and become the top of mind point for dealers to gain the knowledge and tools to manage their dealerships profitably. The applicant conceptualized an automotive dashboard with the gages and tools to make informed decisions. The applicant also conceptualized that the target customer was the automotive dealer and the consumer factor was additional revenue potential as consumers could go to the same site and get access to participating dealers. Thus, the name DealerDashboard. The applicant wishes to note that opposers claim that dashboard is generic in nature: Was not the case when applicant selected the term DealerDashboard and further states that DealerDashboard may have been a contributing factor for, not as a result of, any alleged evolution in the term dashboard.

9.) Through web search, AOL, yahoo, info seek, etc. and applicant doesn't recall that goggle was born, as yet. Applicant searched the US Federal trademark site, and State of Ohio attorney generals site. Applicant also searched the international domain register and purchased every top-level domain, at that time, of the brand DealerDashboard.

10.) None, but reserves the right to amend as necessary through the course of discovery.

11.) Top-of mind, one stop shop location for the tools and gauges to effiently conduct the profitable relationship between dealers, their operations and their communication with the consumer.

12.) Worldwide, but, mostly USA via. Website content, personal visits, direct mail and telemarketing.

13.) All automotive independent and manufacture licensed automotive dealers and the retail consumers.

14.) DealerDashboard.com, net, info, biz, .uk, org, all available search engines, AOL, yahoo, goggle, msn, Lycos direct mailers, personal logo branded apparel, business cards.

15.) All major search engines goggle, AOL, yahoo, msn, Lycos.

16.) (a) http://DealerDashboard.com

(b)http://search.aol.com/aol/search?invocationType=comsearch30&query=DealerDashboard&do=Search

(c)http://search.aol.com/aol/search?query=Dealer+Dashboard&invocationType=spelling

(d)http://www.google.com/search?q=dealerdashboard&rls=com.microsoft:en-us:IE-SearchBox&ie=UTF-8&oe=UTF-8&sourceid=ie7

(e)http://www.google.com/search?hl=en&rls=com.microsoft:en-us:IE-SearchBox&sa=X&oi=spell&resnum=0&ct=result&cd=1&q=dealer+dashboard&spell=1

(f)http://search.msn.com/results.aspx?q=dealerdashboard&src=IE-SearchBox

(g)http://search.msn.com/results.aspx?q=dealer+dashboard&go=&form=QBRE

(h)http://search.lycos.com/index.php?src=ie&query=dealerdashboard

(i)http://search.lycos.com/?src=ie&query=dealer+dashboard&x=59&y=12

(j)http://search.yahoo.com/search?p=dealerdashboard&ei=utf-8&fr=b2ie7

(k)http://search.yahoo.com/search;_ylt=A0geu97E6.tHChEAwXZXNyoA?p=dealer+dashboard&y=Search&fr=b2ie7&ei=UTF-8

(l)Embroidered logo branded apparel

(m)Direct mail pieces.

(n)Business Cards

(o)Applications for floorplan finance.

http://dealerdashboard.com/DSCapplicationplusInstruc.pdf

(p)Wayback archive portal

http://web.archive.org/web/*/http://dealerdashboard.com

(17.) Spent approximately $500.00 in prize giveaways labeled DealerDashboard.com to a Corvette club in Michigan early in 1999 or 2000 for their annual car show. Records were disposed of, but will submit should they become available.

(18.) DealerDashboard has no direct customers but currently serves approximately 5 dealers, which were sold under the dealerdashboard brand as agent for Dealer Services Corporation. Applicant has no estimate of future customer potential or gross revenue estimates. Applicant states that the dealerdashboard brand is promoted 24 hrs. per day 365 days per year via. the website DealerDashboard.com and receives weekly inquiries regarding services offered which may or may not lead to a continuing customer. Many customers are rejected due to credit difficulties.

(19.) $200.00 estimate.

(20.) None, but reserves the right to amend as necessary through the course of discovery.

(21.) Michael Dalton

(22.) Web search, by applicant, in May 2006 revealed a non-secure site listing in search engines under the term dealerdashboard during normal business involving periodic defense of trademark brand operated by opposer.

(http://www.in.honda.com/RRAADCTM/Content/AAD/AD85/DashboardiNadmin.htm). The opposer was marketing a product utilizing the term dealer dashboard, which created initial interest confusion. The opposer was marketing a product titled dealer dashboard in a manner that Honda dealers would associate the brand dealer dashboard with Honda the manufacture and not the founder and applicant; thus, resulting in delusion of the applicants brand. Upon applicants cease and desist demand the opposer ceased using dealer dashboard and instead used the term Dealer Principal and GM - Dashboard Application. This conversion resulted in the continuation of initial interest confusion as Meta spiders continued to list opposers site within the top ten search listings, on the search term dealerdashboard, due to the Meta spider craw of Dealer and Dashboard. Applicant, Michael Dalton, then advised Honda to cease and desist the continued initial interest confusion. Honda currently does not appear in search engines under the term dealerdashboard or dealer dashboard. Applicant is currently unaware if Honda is currently promoting the brand dealerdashboard or dealer dashboard internally through secure methods to circumvent applicants brand.

(23.) A Web search, by applicant, in May 2006 revealed a non-secure site listing in search engines under the term dealerdashboard during normal business involving periodic defense of trademark and brand. The opposer was marketing a product utilizing the term dealer dashboard, which created initial interest confusion. The opposer was marketing a product titled dealer dashboard in a manner that Honda dealers would associate the brand dealer dashboard with Honda the manufacture and not the founder and applicant thus resulting in delusion of the applicants brand. Upon applicants cease and desist demand the opposer ceased using dealer dashboard and instead used the term Dealer Principal and

GM - Dashboard Application. This conversion resulted in the continuation of initial interest confusion as Meta spiders continued to list the site within the top ten search listings due to the Meta spider craw of Dealer and Dashboard. Applicant then advised Honda to cease and desist the continued initial interest confusion. Honda currently does not appear in search engines under the term dealerdashboard or dealer dashboard. Applicant is currently unaware if Honda is currently promoting the brand dealerdashboard or dealer dashboard internally through secure methods to circumvent applicants brand.

(24.) Yes, applicant considered the issue of initial interest confusion and made a cease and desist demand on opposer. A Web search, by applicant, in May 2006 revealed a non-secure site listing in search engines under the term dealerdashboard during normal business involving periodic defense of trademark and brand (http://www.in.honda.com/RRAADCTM/Content/AAD/AD85/DashboardiNadmin.htmhttp://trade) operated by opposer.

The opposer was marketing a product utilizing the term dealer dashboard, which created initial interest confusion. The opposer was marketing a product titled dealer dashboard in a manner that Honda dealers would associate the brand dealer dashboard with Honda the manufacture and not the founder and applicant; thus, resulting in delusion of the applicants brand. Upon applicants cease and desist demand the opposer ceased using dealer dashboard and instead used the term Dealer Principal and GM - Dashboard Application. This conversion resulted in the continuation of initial interest confusion as Meta spiders continued to list opposers site within the top ten search listings due to the Meta spider craw of Dealer and Dashboard. Applicant then advised Honda to cease and desist the continued initial interest confusion. Honda currently does not appear in search engines under the term dealerdashboard or dealer dashboard. Applicant is currently unaware if Honda is currently promoting the brand dealerdashboard or dealer dashboard internally through secure methods to circumvent applicants brand.

(25) Michael Dalton

(26) Michael Dalton

(27.) None, but reserves the right to amend as necessary through the course of discovery.

Further sayeth naught:

Michael Dalton

Sworn before me this 28th day of March, 2008

Before Eileen E Pine Notary Public

EILEEN E. PINE, Notary Public
In and for the State of Ohio
My Commission Expires Nov. 15, 2011

H-001399

Certificate of Service

I, Michael Dalton certify that I have submitted his response to opposer's First Set of Interrogatories via. electronic email upon attorneys for opposer, Mark Matuschak at mark.matuschak@wilmerhale.com, and Cora Han at cora.han@wilmerhale.com this 28th day of March 2008.

/ Michael Dalton /
Electronically Signed

Applicants Response
To
Opposer's First Set of Requests for Documents and Things

As to:

1.) All documents as presented with this document and additional documents available at:

http://ttabvue.uspto.gov/ttabvue/ttabvue-91173105-OPP-9.pdf

http://ttabvue.uspto.gov/ttabvue/v?pno=91173105

http://tarr.uspto.gov/servlet/tarr?regser=serial&entry=76530706

2.) All documents presented and those available electronically at:

http://DealerDashboard.com

3.) All documents presented of record and additionally available at:

http://DealerDashboard.com

4.) All documents presented and considered duplication.

5.) Investigation was a mental and physical process involving research and no documents where discovered that would indicate that the Applicant's mark was not an original creation.

6.) All documents presented and considered duplication.

7.) All documents presented.

8.) All documents presented.

9.) Exhibit (A)(1) of record and available at:

http://ttabvue.uspto.gov/ttabvue/ttabvue-91173105-OPP-9.pdf

(10.) All documents as presented.

(11.) All documents as presented and additionally available at:

DEPOSITION EXHIBIT 37
Dalton
Jh 5-5-08

H-001401

http://DealerDashboard.com

(12.) All sales and services are available worldwide and available at:

http://DealerDashboard.com

13.) Applicant does not have in their possession any documents regarding first sale, but, most recent sale is presented as Exhibit (J).

14.) Applicants documents for past, present and future marketing plans are available by conducting web site search via. currently available search engines with the goal of maintaining the number one spot on search terms dealerdashboard and dealer dashboard. Additionally, direct mail, business card as presented with this document and maintain the wed site http://DealerDashboard.com.

15.) http://DealerDashboard.com, and the duplication of previous documents identified in (14).

16.) As separate attachment exhibit (K),(L),(M).

17.) Applicants past, current and potential customers would be all independent and manufacture licensed automotive dealers and consumers who have opted to visit the web site: http://DealerDashboard.com

18.) No documents to date.

19.) Applicant has participated in only one auto show as previously identified and does not currently have any documents regarding that event.

20.) None

21.) Affiliate agreements which are adhesive in nature and available to the public for which applicant does not maintain a copy, but available at:

http://linkshare.com

http://www.cj.com/

http://www.performics.com/

22.) Exhibit (N), (O)

23.) Exhibit (P)

24.) Exhibit (P)

25.) Exhibit (P)

26.) All documents available and stored at:

http://tess2.uspto.gov/bin/showfield?f=doc&state=as1tec.5.3

http://tess2.uspto.gov/bin/showfield?f=doc&state=as1tec.5.2

http://ttabvue.uspto.gov/ttabvue/v?pno=91173105&pty=OPP

27.) All documents currently identified as Exhibits (A) – (T) and at http://DealerDashboard.com

(28.) Exhibits (A) – (T) and at http://DealerDashboard.com

(29.) Applicant does not currently have any expert witness, but reserves the right to amend through the course of discovery.

Certificate of Service

I, Michael Dalton certify that I have submitted his response to opposer's First Set of Requests for Documents and Things via. electronic email upon attorneys for opposer, Mark Matuschak at mark.matuschak@wilmerhale.com, and Cora Han at cora.han@wilmerhale.com this 28th day of March 2008.

/ Michael Dalton /
Electronically Signed

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

Proceeding	91173105
Party	Defendant Dalton, Michael Dalton, Michael Box 18137 670 Northland Blvd Cincinnati, OH 452180137
Correspondence Address	Michael Dalton Box 18137 670 Northland Blvd Box 18137 Cincinnati, OH 45218-0137
Submission	Other Motions/Papers
Filer's Name	Michael Dalton
Filer's e-mail	DALTONME@hotmail.com, DealerDashboard@hotmail.com
Signature	/ Michael Dalton /
Date	01/07/2007
Attachments	AnswerExhibits002.pdf (25 pages)(2262443 bytes)

Domain Account Manager — iDomain

Home	Domain Names	Web Hosting	SSL Certificates	Email Accounts	Marketing Tools	Build a Website

ICANN · My Account · FAQ · Support Phone: [illegible] Logout

WHOIS Search Results for: DEALERDASHBOARD.COM

Search Again
Enter a Domain Name to Check
.com GO

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http://www.networksolutions.com

Registrant:
DEALERDASHBOARD
PO BOX 18137
CINCINNATI, OH 45218
US

Domain Name: DEALERDASHBOARD.COM

Administrative Contact, Technical Contact:
DALTON, MICHAEL DealerDashboard@hotmail.com
DEALERDASHBOARD
PO BOX 18137
CINCINNATI, OH 45218
US
(513) 557-2901 fax: (309) 215-9770

Record expires on 05-Oct-2007.
Record created on 05-Oct-1999.
Database last updated on 6-Jan-2007 19:48:59 EST.

Domain servers in listed order:

NS1.BRAVEHOST.COM
NS2.BRAVEHOST.COM

Registry Status: clientTransferProhibited

See Underlying Registry Data
Report Invalid Whois

Available TLDs

- DEALERDASHBOARD.NAME $9.75/yr

You might also consider:

- DEALERDASHBOARDONLINE.COM $8.95/yr
- ONLINEDEALERDASHBOARD.COM $8.95/yr
- DEALERDASHBOARDHOME.NET $8.75/yr
- HOMEDEALERDASHBOARD.NET $8.75/yr
- DEALERDASHBOARDSITE.ORG $8.75/yr
- SITEDEALERDASHBOARD.ORG $8.75/yr
- DEALERDASHBOARDWEB.INFO $8.75/yr
- WEBDEALERDASHBOARD.INFO $8.75/yr
- DEALERDASHBOARDLIVE.BIZ $8.75/yr
- LIVEDEALERDASHBOARD.BIZ $8.75/yr
- DEALERDASHBOARDONLINE.US $8.95/yr

REGISTER NOW!

DEFENDANT'S EXHIBIT

INTERNET ARCHIVE WaybackMachine

Enter Web Address: http:// All Take Me Back Adv. Search Compare Archive Pages

Searched for http://dealerdashboard.com

139 Results

Note some duplicates are not shown. See all.
* denotes when site was updated.

Search Results for Jan 01, 1996 - Jan 07, 2007

1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
0 pages	0 pages	0 pages	0 pages	21 pages	21 pages	6 pages	22 pages	28 pages	15 pages	13 pages	0 pages
				Feb 29, 2000 *	Feb 01, 2001 *	Jan 23, 2002	Feb 01, 2003	Jan 24, 2004 *	Jan 30, 2005 *	Jan 01, 2006	
				Mar 01, 2000	Feb 04, 2001	Feb 04, 2002	Feb 08, 2003 *	Jan 25, 2004	Feb 05, 2005	Jan 25, 2006 *	
				May 10, 2000 *	Feb 03, 2001	Oct 02, 2002 *	Feb 11, 2003	Feb 02, 2004 *	Feb 09, 2005 *	Jan 26, 2006	
				May 18, 2000 *	Feb 24, 2001 *	Nov 26, 2002 *	Feb 20, 2003 *	Mar 21, 2004 *	Feb 13, 2005 *	Feb 03, 2006 *	
				May 20, 2000 *	Feb 25, 2001 *	Nov 28, 2002 *	Mar 23, 2003	Apr 07, 2004	Feb 28, 2005 *	Feb 05, 2006	
				Jun 17, 2000 *	Mar 01, 2001	Nov 30, 2002 *	Mar 25, 2003 *	Apr 16, 2004	Mar 07, 2005	Feb 23, 2006	
				Jun 19, 2000	Mar 02, 2001		Apr 08, 2003	May 19, 2004	Mar 11, 2005	Mar 14, 2006 *	
				Jun 20, 2000	Mar 09, 2001 *		Apr 11, 2003 *	Jun 02, 2004	Apr 03, 2005	Mar 19, 2006	
				Aug 15, 2000 *	Mar 31, 2001 *		May 24, 2003	Jun 03, 2004	Apr 08, 2005	Mar 25, 2006	
				Aug 22, 2000	Apr 09, 2001 *		May 25, 2003 *	Jun 05, 2004	Aug 31, 2005 *	Apr 09, 2006 *	
				Aug 29, 2000	May 16, 2001 *		Jun 02, 2003 *	Jun 07, 2004	Sep 06, 2005	Apr 26, 2006	
				Sep 29, 2000	May 18, 2001 *		Jul 17, 2003 *	Jun 08, 2004	Nov 04, 2005 *	Apr 27, 2006	
				Oct 09, 2000 *	Jun 19, 2001 *		Jul 23, 2003 *	Jul 28, 2004 *	Dec 11, 2005	Apr 28, 2006	
				Oct 17, 2000 *	Jul 02, 2001 *		Aug 02, 2003	Aug 13, 2004	Dec 23, 2005		
				Oct 18, 2000	Jul 10, 2001		Sep 24, 2003	Aug 25, 2004	Dec 31, 2005		
				Oct 19, 2000	Jul 11, 2001		Oct 03, 2003 *	Sep 01, 2004			
				Nov 09, 2000 *	Aug 04, 2001		Oct 20, 2003 *	Sep 05, 2004			
				Nov 10, 2000 *	Sep 23, 2001 *		Nov 15, 2003 *	Sep 22, 2004			
				Dec 02, 2000 *	Oct 24, 2001 *		Nov 26, 2003 *	Sep 25, 2004			
				Dec 03, 2000	Nov 30, 2001 *		Nov 29, 2003	Sep 28, 2004			
				Dec 04, 2000	Dec 11, 2001		Dec 15, 2003 *	Oct 11, 2004			
							Dec 16, 2003 *	Oct 25, 2004			
								Oct 28, 2004			
								Oct 28, 2004			
								Oct 29, 2004			
								Dec 03, 2004 *			
								Dec 04, 2004			
								Dec 10, 2004			

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DEFENDANT'S EXHIBIT B

United States Patent and Trademark Office

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Portal Home | Patents | Trademarks | Other

Trademark eBusiness

Document Retrieval FAQ

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File Online (TEAS)
Retrieve Documents (TDR)
Retrieve US Registration Certificates
Search Trademarks (TESS)
Trademark Official Gazette

Trademark Ownership
Copies, Products & Services
Supplemental Resources & Support

Trademark Information

Trademark Guidance
Codes, Rules & Manuals
Employee & Office Directories
Fees
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Trademark Trial & Appeal Board

TTAB Manual of Procedure
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24-Mar-2006	TRAM Snapshot of App at Pub for Oppostn	☐
03-Mar-2006	Paper Correspondence Incoming	☐
28-Feb-2006	Offc Action Outgoing	☐
14-Feb-2006	Preliminary Amendment	☐
14-Feb-2006	Response to Office Action	☐
16-Aug-2005	Offc Action Outgoing	☐
22-Jan-2005	Suspension Letter	☐
03-Jan-2005	Paper Correspondence Incoming	☐
30-Dec-2004	Response to Office Action	☐
30-Jul-2004	Fax Outgoing	☐
29-Jun-2004	Offc Action Outgoing	☐
29-Jun-2004	XSearch Search Summary	☐
11-Dec-2003	drawing	☐
11-Dec-2003	Specimens	☐
11-Dec-2003	Trademark Application	☐

If you need help:

- *Call the Trademark Assistance Center at 571.272.9250 for help on trademark matters.*
- *Send questions about USPTO programs to the USPTO Contact Center (UCC).*
- *If you have technical difficulties or problems with this application, please e-mail them to Electronic Business Support Electronic Applications or call 1 800-786-9199.*

DEFENDANT'S EXHIBIT C

1

o: Michael Dalton (DALTONME@hotmail.com)
ubject: TRADEMARK APPLICATION NO. 78339571 - DEALERDASHBOARD - N/A
ent: 1/22/2005 10:21:55 AM
ent As: ECOM112@USPTO.GOV
ttachments:

UNITED STATES PATENT AND TRADEMARK OFFICE

SERIAL NO: 78/339571

APPLICANT: Michael Dalton

78339571

CORRESPONDENT ADDRESS:
Michael Dalton
Box 18137
670 Northland Blvd Box 18137
Cincinnati, OH 45218-0137

RETURN ADDRESS:
Commissioner for Trademarks
P.O. Box 1451
Alexandria, VA 22313-1451

If no fees are enclosed, the address should include the words "Box Responses - No Fee."

MARK: DEALERDASHBOARD

CORRESPONDENT'S REFERENCE/DOCKET NO: N/A

CORRESPONDENT EMAIL ADDRESS:
DALTONME@hotmail.com

Please provide in all correspondence:

1. Filing date, serial number, mark and applicant's name.
2. Date of this Office Action.
3. Examining Attorney's name and Law Office number.
4. Your telephone number and e-mail address.

erial Number 78/339571

NOTICE OF SUSPENSION

ction on this application is suspended pending the disposition of:

- Application Serial No(s). 76530706

nce applicant's effective filing date is subsequent to the effective filing date of the above-identified application(s), tl tter, if and when it registers, may be cited against this application. See 37 C.F.R. §2.83. A copy of information releva this pending application(s) **was sent previously**. The applicant may request that the application be removed fro spension by presenting arguments related to the potential conflict between the relevant applications or other argumer lated to the ground for suspension. The applicant's election to present or not to present arguments at this time will n fect the applicant's right to present arguments later.

ıe following requirements are CONTINUED:

1 Identification and Classification of Services

The proposed amendment to the identification of services reads as follows: providing online management tools aı information regarding automobiles for sale via the internet, parts and accessories; and dealerships in the field automobiles. This wording is not acceptable because "providing online management tools" is too broad and must l clarified to identify the common commercial name of the services. The applicant may adopt the following wording accurate: providing information about automobiles and automotive parts and accessories for sale via the Internet; aı providing a web site featuring information about automobile dealerships, automobiles, automotive parts aı accessories, at which users can link to the retail web sites of others.

2. Basis for Registration

In its response, the applicant refers to Section 1(a) as the basis, and includes specimens. However, the applicant do not address the dual basis (intent-to-use) currently of record. Inasmuch as the applicant cannot proceed under bo bases for the same services, the applicant must confirm that it intends to proceed under use only.

3. Specimen

The substitute specimens appear to be acceptable for Class 35. However, the applicant did not submit the requir averment. Therefore, the applicant must verify with an affidavit or a declaration under 37 C.F.R. Section 2.20, that tl substitute specimen was in use in commerce at least as early as the filing date of the application.

A sample declaration is set forth below for the applicant's convenience.

---

he following is a properly worded declaration under 37 C.F.R. §2.20. At the end of your response, please insert the eclaration signed by someone authorized to sign under 37 C.F.R. §2.33(a):

'he substitute specimen was in use in commerce at least as early as the filing date of the application.

'he undersigned, being hereby warned that willful false statements and the like so made are punishable by fine or nprisonment, or both, under 18 U.S.C. §1001, and that such willful false statements may jeopardize the validity of the pplication or any resulting registration, declares that the facts set forth in this application are true; all statements made o is/her own knowledge are true; and all statements made on information and belief are believed to be true.

ignature ______________________
lame and Position ________________________________
)ate ______________________

IOTE: For the signature above, use the same format as the electronic signature on the original e-TEAS application, e.g., ohn doe/ or /jd/. 37 CFR §2.193(c)(1)(iii); TMEP §§304.08 and 804.05.

OTICE: FEE CHANGE

:fective January 31, 2005 and pursuant to the Consolidated Appropriations Act, 2005, Pub. L. 108-447, the following a e fees that will be charged for filing a trademark application:

(1) $325 per international class if filed electronically using the Trademark Electronic Application System (TEAS or

(2) $375 per international class if filed on paper

iese fees will be charged not only when a new application is filed, but also when payments are made to add classes to : isting application. If such payments are submitted with a TEAS response, the fee will be $325 per class, and if su ıyments are made with a paper response, the fee will be $375 per class.

ıe new fee requirements will apply to any fees filed on or after January 31, 2005.

OTICE: TRADEMARK OPERATION RELOCATION

ıe Trademark Operation has relocated to Alexandria, Virginia. Effective October 4, 2004, all Trademark-related paper ail (except documents sent to the Assignment Services Division for recordation, certain documents filed under the Madr 'otocol, and requests for copies of trademark documents) must be sent to:

Commissioner for Trademarks
P.O. Box 1451
Alexandria, VA 22313-1451

pplicants, attorneys and other Trademark customers are strongly encouraged to correspond with the USPTO online via tl :ademark Electronic Application System (TEAS), at http://www.uspto.gov/teas/index.html.

/Patty Evanko/

Trademark Attorney

Law Office 112

571-272-9404

patty.evanko@uspto.gov (questions only)

DEFENDANT'S EXHIBIT D

Thank you for your request. Here are the latest results from the TARR web server.

This page was generated by the TARR system on 2007-01-06 21:53:13 ET

Serial Number: 76530706 Assignment Information

Registration Number: (NOT AVAILABLE)

Mark (words only): DEALER DASHBOARD

Standard Character claim: No

Current Status: Abandoned after an inter partes decision by the Trademark Trial and Appeal Board.

Date of Status: 2005-06-13

Filing Date: 2003-07-10

Transformed into a National Application: No

Registration Date: (DATE NOT AVAILABLE)

Register: Principal

Law Office Assigned: LAW OFFICE 114

If you are the applicant or applicant's attorney and have questions about this file, please contact the Trademark Assistance Center at TrademarkAssistanceCenter@uspto.gov

Current Location: 657 -Pre-Publication Final Review

Date In Location: 2004-08-06

LAST APPLICANT(S)/OWNER(S) OF RECORD

---

1. Nowcom Corporation

Address:
Nowcom Corporation
7451 Wilshire Blvd., Suite 115
Los Angeles, CA 90010
United States
Legal Entity Type: Corporation
State or Country of Incorporation: California
Phone Number: (323) 692-8933
Fax Number: (323) 692-8933

GOODS AND/OR SERVICES

International Class: 035
Class Status: Abandoned
Preparing business reports in a secure on-line environment to automobile dealerships
Basis: 1(a)
First Use Date: 2003-01-01
First Use in Commerce Date: 2003-01-01

ADDITIONAL INFORMATION

Disclaimer: DEALER

MADRID PROTOCOL INFORMATION

(NOT AVAILABLE)

PROSECUTION HISTORY

2005-03-10 - Abandonment - After inter partes decision (Initial exam)

2005-03-10 - Opposition sustained for Proceeding

2005-03-10 - Abandonment deleted by TTAB

2005-02-11 - TEAS Change Of Correspondence Received

2005-02-10 - Abandonment - After publication

2005-02-10 - TEAS Express Abandonment Received

2004-12-09 - Opposition instituted for Proceeding

2004-10-14 - PAPER RECEIVED

2004-07-14 - Extension Of Time To Oppose Received

2004-06-15 - Published for opposition

2004-05-26 - Notice of publication

2004-04-02 - Approved for Pub - Principal Register (Initial exam)

2004-02-26 - Communication received from applicant

2004-02-26 - TEAS Response to Office Action Received

2004-01-26 - Non-final action mailed

2004-01-17 - Assigned To Examiner

H-001415

ATTORNEY/CORRESPONDENT INFORMATION

Attorney of Record
Natu J. Patel

Correspondent
NATU J. PATEL
WANG HARTMANN & GIBBS PC
1301 DOVE STREET, SUITE 1050
NEWPORT BEACH, CA 92660
Phone Number: (949) 833-8483
Fax Number: (949) 833-2281

DEFENDANT'S EXHIBIT

Important: 1) Allow your email client to display ... portions of this report.
2) Add domain ranking.com to your "Safe List" to make sure this monthly report does not get blocked by your email filters.

TrustGauge and Ranking Report for *"dealerdashboard.com"*

A DealerDashboard.com - New, Used Cars [check performance]new
All Things Automotive Directory with daily updated Auto News, Hot Off The Wire, Dealer 2 Dealer Auct...

Click to Modify Website Details

Ranking.com ranks this site #25 in its category:

* Shopping/Automotive/Buyers_Services

Changes Since 11/15/2006 1:23 PM:

	11/15/2006	Today	Change
Traffic ranking among all sites:	223,928	223,240	↑ 688
TrustGauge points:			N/A
Links pointing to this site:	379	415	↑ 36
Link popularity ranking:	141,561	136,946	↑ 4,615
Organization Reviews:		N/A	
Website Reviews:		N/A	

Read / Write Reviews & Complaints

Contact Information:

DealerDashboard.com
670 Northland Blvd.
Cincinnati, OH 45218-0137
United States
513-557-2801
Toll-Free: (888) 826-2706
contact@DealerDashboard.com

Click to Modify Website Details

Site Information:

View Contact Form
View Privacy Policy

Language:	English
Area of Service:	International

See how dealerdashboard.com used to look...

Attention Webmasters!
Do you want to be informed when your website goes down? InternetSupervision.com monitors the ...

TrustGauge

ValidatedSite.com

How to Improve Your TrustScore:

1/6/2007

There are two ways to improve your TrustGauge score:

- Make sure that you include and update all significant information about your website at TrustGauge.com.
- Consider having your website and company validated by a third-party company like ValidatedSite.com.

How to Read the TrustGauge Report:

For more information on how to read the different sections of this TrustGauge report, click here to visit our help page.

TrustGauge Report Sponsors

If you wish to unsubscribe from receiving TrustGauge reports for *"dealerdashboard.com"*:

contact@DealerDashboard.com **Unsubscribe**

H-001418

DEFENDANT'S EXHIBIT E (3)

Current category: shopping / automotive / buyers services

Sub-categories: 6 sub-categories...

Search for a category by entering a keyword: Submit

Rankings

Category Rank	Web Rank	Domain	TrustGauge	Company Name	Links
1	599	kbb.com	6	KELLEY BLUE BOOK CO., INC	285,293
2	735	edmunds.com	6	EDMUNDS.COM, INC	278,292
3	1,544	autobytel.com	5	N/A	267,739
4	2,572	automotive.com	5	AUTOMOTIVE.COM	100,738
5	2,604	autoweb.com	5	AUTOWEB	19,869
6	3,197	drive.com.au	5	N/A	130,000
7	4,795	automart.com	5	N/A	36,801
8	6,692	parkers.co.uk	5	N/A	12,213
9	8,880	pricequotes.com	5	Raistral Technology Inc.	3,069
10	11,064	invoicedealers.com	3	INVOICEDEALERS	59,652
11	11,168	vehix.com	2	VEHIX	29,444
12	25,592	autoexpress.co.uk	2	N/A	18,391
13	27,652	autobytel.co.uk	2	N/A	915
14	28,768	intellichoice.com	2	INTELLICHOICE, INC	59,987
15	30,312	autoworld.com	2	AUTO WORLD	160,860
16	51,396	autopedia.com	2	N/A	30,526
17	57,172	netcar.co.il	2	N/A	105
18	59,080	auto123.com	2	AUTO123.COM	30,311
19	73,455	ncen.com	2	N/A	15,350
20	84,744	hpicheck.com	2	N/A	284
21	108,450	motoralley.com	3	MotorAlley, LLC	711
22	114,965	carcostcanada.com	1	N/A	1,701
23	131,559	costcoauto.com	1	N/A	76
24	154,869	carquotes.com	1	N/A	231
25	157,568	carshop.co.uk	1	N/A	95

DEFENDANT'S EXHIBIT [illegible]

Ranking.com

Home | about | services | support | rankings

Domain Rank Category Country Language Advanced

Current category: shopping / automotive / buyers services

Sub-categories: 6 sub-catagories

Search for a category by entering a keyword: Submit

Rankings

Category Rank	Web Rank	Domain	TrustGauge	Company Name	Links
26	166,798	jamjar.com	1	N/A	1,777
27	171,295	cartrackers.com	1	N/A	15,758
28	223,240	dealerdashboard.com	6	DealerDashboard.com	415
29	243,807	cardata.co.uk	1	N/A	750
30	256,290	vcars.co.uk	1	N/A	21,995
31	292,779	ewzone.com	1	N/A	67,699
32	301,835	carseverything.com	1	N/A	3,604
33	305,643	autogiant.com	1	Quoteseek Corporation	373
34	313,270	virgincars.com	1	N/A	1,437
35	318,670	autolocator.com	1	N/A	106
36	329,927	fightingchance.com	1	FIGHTING CHANCE	183
37	464,987	vin.com	1	N/A	0
38	611,106	carclub.com	1	N/A	40
39	873,920	autosave.co.uk	1	N/A	1,004
40	978,840	stoneage.com	1	N/A	57,797
41	983,118	insidercarsecrets.com	1	N/A	2,900
42	1,002,360	autosmartcat.com	0	AutoSmartcat	214
43	1,029,705	oneswoop.com	0	N/A	2
44	1,042,707	axscorp.com	0	N/A	0

DEFENDANT'S EXHIBIT F

Sign in

Google

Web Images Video News Maps more »

DealerDashboard

Search Advanced Search Preferences

Web

Results 1 - 10 of about 1,110 for DealerDashboard. (0.26 seconds)

Did you mean: *Dealer Dashboard*

A DealerDashboard.com - Dealer Dashboard HotSpot with New Cars ...
All Things Automotive Directory with Daily updated Auto News, Hot Off the Wire. Features a Dealer 2 Dealer Auction and Consumer Auto Mall for New and Used ...
www.dealerdashboard.com/ - 45k - Cached - Similar pages

A DealerDashboard.com - Dealer 2 Dealer Wholesale Auction Online !
What else do you get for only $65/month? © Copyright 1998,99 by Michael Mason & Co. Ltd and STM International DealerDashboard.com exclusive U.S.A. agent ...
www.dealerdashboard.com/auction.html - 8k - Cached - Similar pages
[More results from www.dealerdashboard.com]

www.dealerdashboard.co.uk - redirection service provided by Easyspace
Easyspaceredirection for www.dealerdashboard.co.uk ... "DealerDashboard" "Dealer Dashboard" "DealerHotSpot" "Dealer HotSpot" ...
www.dealerdashboard.co.uk/ - 2k - Cached - Similar pages

www.dealerdashboard.org - redirection service provided by Easyspace
Easyspaceredirection for www.dealerdashboard.org. Your browser doesn't appear to support frames - please click here to view the site.
www.dealerdashboard.org/ - 2k - Cached - Similar pages

Jobs at DEALERDASHBOARD - careerjet.com
Jobs at DEALERDASHBOARD. List maintained by Careerjet, the employment search engine.
www.careerjet.com/jobs_dealerdashboard.html - 12k - Cached - Similar pages

DealerDashboard's AutoWorld Channel
This Auto Channel (powered by Autoworld.com) provides you the most up-to-date automotive invoice and trade-in pricing reports on the Internet today.
www.autoworld.com/partner.asp?p=dealerdashboard - 35k - Cached - Similar pages

Dealer Dashboard (www.dealerdashboard.com) Reviews
Read reviews and testimonials for DEALERDASHBOARD.COM and other websites, posted by users just like you, on XOM Reviews.com.
www.xomreviews.com/dealerdashboard.com - 15k - Supplemental Result - Cached - Similar pages

DealerDashboard Motorcycles,Automobile & Parts Agent,Farm Machines ...
United States Wholesaler/Distributor of Motorcycles,Automobile & Parts Agent,Farm Machines & Tools. DealerDashboard is a United States ...
www.alibaba.com/company/10031564.html - 20k - Supplemental Result - Cached - Similar pages

dealerDashboard.com - The Future View of the Automotive World ...
dealerDashboard.com - The Future View of the Automotive World - All Things Automotive Directory, Online, Dealer 2 Dealer, commission free, wholesale auction ...
www.carjunky.com/.../Car_Auctions/dealerDashboard.com -

_The_Future_View_of_the_Automotive_World_L926/ - 31k - Supplemental Result - Cached - Similar pages

DealerDashboard
Business profile **DealerDashboard**. ... Extended description: **DealerDashboard** is an American firm engaged in export/import of quality automobiles, boats, ...
search.sourcetool.com/db/Profiles_4/azE9NCwxMDAwMzU2NzYx - 10k - Supplemental Result - Cached - Similar pages

Did you mean to search for: ***Dealer Dashboard***

Result Page: 1 2 3 4 5 6 7 8 9 10 **Next**

Get organized for the new year with Google Desktop.

DealerDashboard Search

Search within results | Language Tools | Search Tips | Dissatisfied? Help us improve

Google Home - Advertising Programs - Business Solutions - About Google

Google

Web Images Video News Maps more »

Sign in

Dealer Dashboard

Search Advanced Search Preferences

Web Results **1** - **10** of about **1,140,000** for Dealer Dashboard. (**0.12** seconds)

A DealerDashboard.com - **Dealer Dashboard** HotSpot with New Cars ...
All Things Automotive Directory with Daily updated Auto News, Hot Off the Wire. Features a **Dealer** 2 **Dealer** Auction and Consumer Auto Mall for New and Used ...
www.**dealerdashboard**.com/ - 45k - Cached - Similar pages

A DealerDashboard.com - **Dealer Dashboard** Log In
Dealer Dashboard Login for Automotive **Dealer** Centers to manage their online marketing.
www.**dealerdashboard**.com/passwd.htm - 6k - Cached - Similar pages
[More results from www.dealerdashboard.com]

Denon Canada | **Dealer Dashboard**
The **Dealer Dashboard** is the easiest way for Denon **dealers** to get the latest ... As a Denon **dealer**, the **Dashboard** provides you with all kinds of product ...
ca.denon.com/**DealerDashboard**.asp - 31k - Cached - Similar pages

www.dealerdashboard.co.uk - redirection service provided by Easyspace
"DealerDashboard" "**Dealer Dashboard**" "DealerHotSpot" "**Dealer** HotSpot" "E-motive News" "Tools For Success" "Fast Tracker" "Leads2Sales" "**Dealer** to **Dealer**" ...
www.**dealerdashboard**.co.uk/ - 2k - Cached - Similar pages

Steve Kolb Web Design/Programming Examples
GUI designed for **Dealer Dashboard** Data Mart project. This is the full color, unoptimized version. This GUI was rejected because the project executives ...
www.brokebox.com/steve_examples.html - 6k - Cached - Similar pages

Equipment **Dealer Dashboard** - An Enterprise **Dashboard** for ...
Dealership management dashboards is the topic of today's post on The **Dashboard** Spy. Here we have a screenshot of PFW Systems Corp's IntelliDealer **Dashboard**. ...
dashboardspy.wordpress.com/.../ - 23k - Cached - Similar pages

[PDF] The **Dashboard** makes it easy!
File Format: PDF/Adobe Acrobat - View as HTML
Autogate Professional's outstanding new features. The **Dealer Dashboard** provides a real time snapshot of the. performance of your business by measuring: ...
www carsales.com.au/efacts/issue20/autogatepro.pdf - Similar pages

[PDF] PopShop Online V 2.0 Users Manual
File Format: PDF/Adobe Acrobat - View as HTML
in your **Dealer Dashboard** Help File list. ii. To edit or delete a Help File, simply find that file on this list and click. the appropriate action. ...
www.popshoponline.com/POPSHOP%20Online%20Users%20Manual.pdf - Similar pages

[PDF] PopShop Online User's Manual Addendum
File Format: PDF/Adobe Acrobat - View as HTML
A new option menu appears on your **dealer dashboard**. o Manage Items. Things to Note: ... Items, and a new button, Manage Products on your **Dealer Dashboard**. ...
www.popshoponline.com/PopShop%20Online%20Custom%20Items.pdf - Similar pages

Online Service offers complete car marketingsales solution ...
The **Dealer Dashboard** also connects **dealers** to a variety of online advertising options,

including search engine ad placements, which help reduce advertising ...
news.thomasnet.com/fullstory/499693/3485 - 65k - Jan 5, 2007 - Cached - Similar pages

Result Page: 1 2 3 4 5 6 7 8 9 10 Next

Dealer Dashboard Search

DEFENDANT'S EXHIBIT

AOL Main Mail AIM Join AOL Shopping AOL A to Z

© AOL & AIM Sign In

Web Images Video Audio News Shopping

Advanced Search Settings Help

DealerDashboard

Did you mean: *Dealer Dashboard* ?

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All Things Automotive Directory with Daily updated Auto News, Hot Off the Wire. Features a Dealer 2 Dealer Auction and Consumer Auto Mall for New and Used ...
www.dealerdashboard.com/

A DealerDashboard.com - Dealer 2 Dealer Wholesale Auction Online !
What else do you get for only $65/month? © Copyright 1998,99 by Michael Mason & Co. Ltd and STM International DealerDashboard.com exclusive U.S.A. agent ...
www.dealerdashboard.com/auction.html

Jobs at DEALERDASHBOARD - careerjet.com
Jobs at DEALERDASHBOARD. List maintained by Careerjet, the employment search engine.
www.careerjet.com/jobs_dealerdashboard.html

Jobs in retail - wholesale - careerjet.com
DEALERDASHBOARD - Cincinnati, OH www.dealerdashboard.com - Dec. 22. Retail Sales Merchandiser Cincinnati, OH www.hirediversity.com - Dec. 21 ...
www.careerjet.com/cgi-bin/user/search.cgi?...

DealerDashboard's AutoWorld Channel
This Auto Channel (powered by Autoworld.com) provides you the most up-to-date automotive invoice and trade-in pricing reports on the Internet today.
www.autoworld.com/partners.asp?p=dealerdashboard

Managing the entire sales process
DealerDashBoard is a sales process measurement tool that instils discipline ... In DealerDashBoard, the monitoring of the sales process is broken down into ...
www.sewells.co.za/default.asp?id=...

"Behind the Wheel - We Deliver"
Signup for an email account @dealerDashboard.every1.net Select an option: ... DealerDashboard.com Ad-Supported Email 25 MB A basic free email account ...
dealerdashboard.mail.everyone.net/email/scripts/serviceMenu.pl?user=new&EV1...

"Behind the Wheel - We Deliver"
Existing Users, New to DealerDashboard.com? User Name:, Password:, Remember Me. (Save my user name & password on this ... Return to DealerDashboard.com ...
dealerdashboard.mail.everyone.net/

Automotive Information Resources Information | Business.com
DealerDashboard.com. Automotive resource center offering a dealer-to-dealer wholesale online auction, consumer shopping services and a directory of ...
www.business.com/directory/automotive/reference/

Denon USA | Dealer Dashboard
Stay up to date on all things related to your product. Learn More • Warranty & Service Does your product need service? We have several authorized service ...
usa.denon.com/DealerDashboard.asp

1 2 3 4 5 6 7 8 9 10 Next

This new version of AOL Search now has features that will help you search less and discover more:

- Tell us what you think.
- Check out what's new on AOL Search.

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Web Images Video Audio News Shopping

DealerDashboard

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City Guide | MapQuest | Movies | White Pages | Yellow Pages | AOL A to Z
Download AOL | Help | Privacy Policy | Terms of Use | Trademarks | AOL Accessibility Policy

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All Things Automotive Directory with Daily updated Auto News, Hot Off the Wire. Features a **Dealer** 2 **Dealer** Auction and Consumer Auto Mall for New and Used ...
www.dealerdashboard.com/

A DealerDashboard.com - **Dealer Dashboard** Log In
Dealer Dashboard Login for Automotive **Dealer** Centers to manage their online marketing.
www.dealerdashboard.com/passwd.htm

Denon Canada | **Dealer Dashboard**
The **Dealer Dashboard** is the easiest way for Denon dealers to get the latest ... As a Denon **dealer**, the **Dashboard** provides you with all kinds of product ...
ca.denon.com/DealerDashboard.asp

Steve Kolb Web Design/Programming Examples
GUI designed for **Dealer Dashboard** Data Mart project. This is the full color, unoptimized version. This GUI was rejected because the project executives ...
www.brokebox.com/steve_examples.html

Equipment **Dealer Dashboard** - An Enterprise **Dashboard** for ...
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dashboardspy.wordpress.com/2006/08/09/equipment-dealer-dashboard-an-enterpr...

PopShop Online V 2.0 Users Manual
in your **Dealer Dashboard** Help File list. ii. To edit or delete a Help File, simply find that file on this list and click. the appropriate action. ...
www.popshoponline.com/POPSHOP%20Online%20Users%20Manual.pdf

PopShop Online User's Manual Addendum
A new option menu appears on your **dealer dashboard**. o Manage Items. Things to Note: ... Items, and a new button, Manage Products on your **Dealer Dashboard**. ...
www.popshoponline.com/PopShop%20Online%20Custom%20Items.pdf

Online Service offers complete car marketingsales solution ...
The **Dealer Dashboard** also connects dealers to a variety of online advertising options, including search engine ad placements, which help reduce advertising ...
news.thomasnet.com/fullstory/499693/3485

The Cobalt Group - Press
Dealer Dashboard Consolidates important performance metrics from Cobalt websites including search and inventory trends, email leads and Media Tracker ...
www.cobaltgroup.com/press/pr/press_release-051026.jsp

Check That '**Dashboard**' Ward's **Dealer** Business - Find Ar...
Check That **Dashboard** from Wards **Dealer** Business in Automotive provided free by LookSmart Find Articles.
findarticles.com/p/articles/mi_m0FJN/is_10_38/ai_n6228393

www.shopping.com

Excel Dashboards
Fill in the blanks templates create color scorecards & control charts
www.qimacros.com

Dashboard Analysis Tools
Intuitive executive **dashboard**. Easy-to-use, drill-down analysis.
www.visualcalc.com

Buy Dash Kits
Choose from Husky and Crystalux Free shipping on orders over $150
www.autobarn.com

See Sponsored Links For: Dealer Dashboard

1 2 3 4 5 6 7 8 9 10... Next

This new version of AOL Search now has features that will help you search less and discover more:

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About This Page

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Dealer Dashboard

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1. A DealerDashboard.com - Dealer Dashboard HotSpot with New Cars, Used Cars, Trucks, SUV
   All Things Automotive Directory with Daily updated Auto News, Hot Off the Wire. ... "DealerDashboard" "Dealer Dashboard" "DealerHotSpot" "Dealer HotSpot" ...
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   View contact information, address, contact details, contact person, telephone, fax of DealerDashboard ... 1-513-5572901; Website: http://www.DealerDashboard.com ...
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6. DealerDashboard.com - All Things Automotive - Automotive - http://maxpages.com/dealerboard
   Automotive One - Stop Resource Center ... DealerDashboard.com, 670 Northland Blvd, PO Box 16137, Cincinnati, Ohio, 45216-0137, USA, 513.557.2901 ...
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   View thousands of used cars for sale, ... Research & Pricing * Research By Make * Research By Category * Personal Vehicle Report ...
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   Wi-Fi Wireless Broadband Internet Service with ... 'DealerHotSpot', 'Dealer HotSpot', 'DealerDashboard', 'Dealer Dashboard'. All rights reserved ...
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Did you mean: Dealer Dashboard

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- Dashboard Part
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1. A DealerDashboard.com - Dealer Dashboard HotSpot with New Cars, Used Cars, Trucks, SUV
   Features a Dealer 2 Dealer Auction and Consumer Auto Mall for New and Used Cars. ... Search WebDealer Dashboard. Nationwide Directory Assistance ...
   www.dealerdashboard.com - 45k - Cached - More from this site
2. A DealerDashboard.com - Dealer Dashboard Log In
   Dealer Dashboard Login for Automotive Dealer Centers to manage their online marketing ... Trademarks: "DealerDashboard" "E-motive News" ... all rights reserved ...
   www dealerdashboard.com/passwd.htm - 5k - Cached - More from this site
3. Denon USA | Dealer Dashboard
   The Dealer Dashboard is the easiest way for Denon dealers to get the latest ... As a Denon dealer, the Dashboard provides you with all kinds of product related ...
   www.usa.denon.com/DealerDashboard.asp - 13k - Cached - More from this site
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   The Dealer Dashboard is the easiest way for Denon dealers to get the latest ... As a Denon dealer, the Dashboard provides you with all kinds of product related ...
   ca.denon.com/DealerDashboard.asp - 30k - Cached - More from this site
5. Subaru Australia Drives Dealer Productivity Via Plumtree-Powered Dashboard Business Wire - Find Articles
   Subaru Australia Drives Dealer Productivity Via Plumtree-Powered Dashboard from Business Wire in Business & Finance provided free by LookSmart Find Articles.
   www.findarticles.com/p/articles/mi_m0EIN/is_2004_Nov_30/ai_n7581009 - 32k - Cached - More from this site
6. CarmaxAuctions > Member Dashboard
   ... you will have access to useful information and great dealer-only features. Register now by downloading a Dealer Registration Form (PDF) or learn more about ...
   www.carmaxauctions.com/DealerDashboard/tabid/72/Default.aspx - 32k - Cached - More from this site
7. globeandmail.com : globeinvestor.com : Subaru Australia Drives Dealer Productivity Via Plumtree-Powered Dashboard
   "The dealer dashboard in the portal has been a huge win for ... Dealer Dashboard? ... also been targeted for improvement using the dealer dashboard, ...
   globeinvestor.com/servlet/WireFeedRedirect?cf=GlobeInvestor/config&... - 36k - Cached - More from this site
8. Marantz America
   The Dealer Dashboard is the easiest way for Marantz dealers to get the latest ... As a Marantz dealer, the Dashboard provides you with all kinds of product ...
   us.marantz.com/Dealers/686.asp - 17k - Cached - More from this site
9. Ward's Dealer Business: Check That Dashboard' | KeepMedia
   KeepMedia Free Trial. One of the hardest things to accomplish during times of uncertainty is maintaining focus. With the distractions in our industry, it almost ...
   www keepmedia.com/pubs/WardsDealerBusiness/2004/10/01/600565 - More from this site
10. Article | Subaru Australia Drives Dealer Productivity Via Plumtree-Powered Dashboard.
    Price: $4.95 | Excerpt: "SAN FRANCISCO -- Plumtree Portal Helps Workload Management for Dealers, Streamlines Communications and Provides Tools to Improve Customer...
    goliath.ecnext.com/comsite5/bin/comsite5.pl?page=description&... - More from this site

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Exhibit (I)

DealerDashboard.com - Jobs available

Last updated Febuary 2th 2004

Sell our products in your state or province!
Full or part-time

Our *D2D™ Dealer to Dealer Wholesale Auction Online*
pays commision residuals (directly into your bank account!) every month!
Earn income every month from past sales!

Our *Dealer Floor Plan and Retail Financing*
pays commision residuals (directly into your bank account!) every month!
Earn income every month from Dealer Accounts!

Our *Dealer Website Development*
pays commision residuals (directly into your bank account!) every month!

Our *Retail Automotive and Motorcycle Sales Training*
pays commision on each session(directly into your bank account!) every month!

Our *Wholesale Parts Marketing Training*
pays commision on each session(directly into your bank account!) every month!

Our *Data Mining and Target Marketing Programs*
pays commision on each sale(directly into your bank account!) every month!

Our *CRM Up's Management Programs*
pays commision residuals(directly into your bank account!) every month!

Our *Dealer Supplies*
pays commision on each sale (directly into your bank account!) every month!

Auto dealership experience required (car sales or magangment).
Must be motivated, self-directed, and computer literate.

E-mail your resume to jobs@DealerDashboard.com.

DealerDashboard.com, 670 Northland Blvd., PO Box 18137, Cincinnati, Ohio 45218-0137
jobs@DealerDashboard.com

Free listing & homepage on *DealersAutoMall.com*

Your dealership will be listed (with a picture of your dealership) on YourCity.DealersAutoMall.com which links directly to your website.

- *FREE* DealersAutoMall.com/YourDealership homepage!
- *Advertise directly to your target market!*

Your retail listings on AmericanUsedCars.com

All your used cars on the net - all the time! Sophisticated yet easy-to-use Find feature for the public!
Can be updated daily - right at your dealership!
Public E-mail: ***YourDealership@AmericanUsedCars.com***
(YourDealership.com and/or a custom website are available seperately.)

Do you want to know more?

Wholesale Auction with *No listing, selling, or buying fees!*

Weekly Wholesale Auction administered by you, to help you sell vehicles to other dealers, and to get the cars you want

Do you want to know more?

A used vehicle Inventory Management System

Run Aged Inventory Lists. Lists by stock #, model, price, year.
Print price stickers! Accessible from anywhere you can get on-line!
Vehicle Cost control now available! *Work deals for maximum gross.*

Do you want to know more?

Used Car listings of member dealers, with 'find' feature

Sophisticated 'finder' feature designed to help you locate what your customers want!

Do you want to know more?

Information on other dealers

Name, address, phone, fax, E-mail, Website, and whom to contact for trades, vehicle information, buying & selling!

Do you want to know more?

A Bulletin Board to let you reach other dealers

Swap information, sell or swap items, post warnings (theft, fraud, etc.) - a true forum!

Do you want to know more?

4 major Easy-to-use features - with more yet to come!

WHOLESALE AUCTION: FIND | BROWSE | ADD | YOUR'S
YOUR INVENTORY: FIND | BROWSE | ADD
USED CARS: FIND | BROWSE
DEALERS: FIND | BROWSE

No software disks, no viruses, world-wide access!

Sign Up

How to Join

Sign Up

H-001433

Picture to upload (640 pixels wide recommended): Browse...

D2D vehicle detail form

Lot # 2

1992 Dodge

Model: Caravan Minivan

Light Gray OR

Automatic 3-speed 4 Cylinders

Unleaded Litres (1000 cc's)

Stock# 0001 Needs

```
Power Brakes, Power Steering, Rear
Defogger, Stereo Cassette, Air
Conditioning, Airbag Driver, FWD,
Rear Wiper
```

no tape or remote
no remote
airbags and alloys

ADD option:

Power Brakes
Power Steering
Tinted Glass
Rear Defogger
Reclining Seats
Radio
Stereo Cassette
CD
CD Remote
Air Conditioning
Cruise Control
Tilt Steering
Power Mirrors
Power Windows
Power Locks

Condition average Odometer 183,000 mi.

Internet Price shown. Regular: $XXXXX

Notes:

Declarations:

SOLD? ☐ SOLD

List: ☑ Public? ☑ Dealers?

Public Retail sticker price $ 2800 ☐ hide?

Dealers wholesale price $ 2000 ☑ hide?

DELETE!

Change THIS vehicle NOW!

Private Data:

VIN *VIN info*

Date in stock 11/14/2001 mm/dd/yy

Source: Trade In	:	$ 750
Detailing	:	$ 89.99
Reconditioning	:	$ 1000.00
Safety Inspection	:	$ 45.00
Fuel	:	$ 100.00
Repairs	:	$ 300.00
	:	$
	:	$
	:	$
	:	$
	:	$

or pick a cost type ... AirCare fee / Base commission / Detailing $ ...add cost

TOTAL cost: $ 2,284

GROSS profit at $ 2800 : $ 516

DELETE!

Change THIS vehicle NOW!

H-001434

Picture to upload (640 pixels wide recommended): Browse...

OH0001

D2D vehicle detail form 3?

2007 Acura OR

Model: Sedan

OR

Automatic 4-speed Cylinders

Unleaded Litres (1000 cc's)

Stock# Needs

no tape or remote
no remote
airbags and alloys

ADD option:

Power Brakes
Power Steering
Tinted Glass
Rear Defogger
Reclining Seats
Radio
Stereo Cassette
CD
CD Remote
Air Conditioning
Cruise Control
Tilt Steering
Power Mirrors
Power Windows
Power Locks

Condition Odometer km

Internet Price shown. Regular: $XXXXX

Notes:

Declarations:

SOLD? ☐ SOLD

List: ☑ Public? ☑ Dealers?

Public **Retail sticker** price $ ☐ hide?

Dealers **wholesale** price $ ☐ hide?

List THIS vehicle NOW! Oops!

Private Data:

VIN *VIN info*

Date in stock 3/27/2008 mm/dd/yy

Source: : $

: $

: $

: $

: $

: $

or pick a cost type ... AirCare fee $

Base commission ...add cost

Detailing

TOTAL cost: $ 0

GROSS profit at $: $

List THIS vehicle NOW! Oops!

H-001435

OH0001
2

1992 Dodge Caravan (Minivan) Light Gray Automatic 3-speed Unleaded (4 Cylinders) Stock #0001 'average' Mileage: 183,000 mi.
Options: Power Brakes, Power Steering, Rear Defogger, Stereo Cassette, Air Conditioning, Airbag Driver, FWD, Rear Wiper

NO Declarations

Retail sticker: **$2,800**
Dealer Wholesale **($(2000) hidden)**
Auction: Reserve= $2,000
Listed by: OH0001
(of **Cincinnati**, Hamilton, OH)

Private Data:
Date in stock: 11/14/2001 (2325 *days ago*)

DELETE listing! EDIT listing!

Price Sticker!
Acrobat (*.pdf) plug-on *NOT installed!!!*
Click below if you need *Adobe Acrobat Reader*
Adobe Acrobat Reader

Transfer to Dealer #:
Leave dealer blank to copy or move to yourself.
MOVE vehicle! COPY vehicle!

Primary picture 0001: Browse... Upload picture now! *Call (250)386-6497 for help.*

Java 1.4 or higher plugin required!

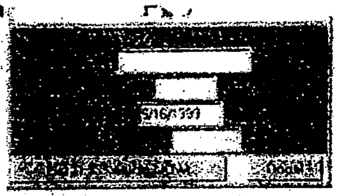
H-001436

YOUR INVENTORY
FIND BROWSE ADD

Used Inventory Management System!

The **D2D Inventory Management System** tracks your used vehicles *and* lets other dealers search your inventory *and* shows your inventory to the public on CanadianUsedCars.com or AmericanUsedCars.com

When you enter a used vehicle's details a special ***Private Data*** area is reserved for your dealership's private use.



YOUR INVENTORY
FIND BROWSE ADD
The vehicle's ***VIN*** is important for verifying standard features and a clean history.

Make sure the ***Date In Stock*** is correct - with it you will get **Aged Inventory Reports** automatically!

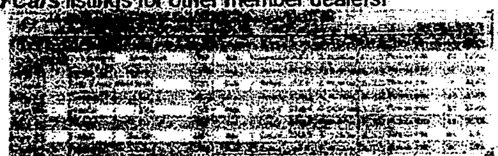
If you don't want to browse your huge used vehicle inventory, the **Find** screen can help you precisely locate vehicles.

YOUR INVENTORY
FIND BROWSE ADD
You can search by any combination of make, model, body type, year(s), price range, province, even specific dealers!

Entering a used vehicle in the **D2D Used Vehicle Inventory** takes about 30 seconds to 2 minutes (the more you use it the easier it gets!)

YOUR INVENTORY
FIND BROWSE ADD
Adding a listing to your used vehicle inventory also adds the vehicle to *CanadianUsedCars.com* and the *Used Cars* listings for other member dealers!

Click ***Browse*** to see the ***Aged Inventory Report***!



Red means over 90 days (stale!)

yellow means 30 to 60 days (almost stale?)

green means under 30 days (fresh!)

To sort your inventory list just click on **lot#**, **make**, **model**, etc. *Click again to reverse the sort.*

What else do you get for only $65/month?

e-mail the Webmaster

Service Department Expense Breakdown

	Percent of Dept. Gross	
Personnel		45%
Salaries - Owners	2.5%	
Salaries - Supervision	12.5%	
Salaries - Clerical	3.5%	
Other Salaries & Wages	14.5%	
Absentee Compensation	3.0%	
Taxes - Payroll	6.0%	
Employee Benefits	3.0%	
Semi-fixed		19%
Office Supplies and Expenses	1.0%	
Other Supplies	3.5%	
Advertising	2.3%	
Policy Work-Parts & Service	2.0%	
Outside Services-DP/Other	3.3%	
Telephone & Telegraph	1.4%	
Training	2.0%	
Other Semi-fixed	3.5%	
Fixed		16%
Rent		
Amortization - Leaseholds		
Repairs - Real Estate		
Depreciation - Buildings & Improvements		
Taxes - Real Estate		
Insurance - Buildings & Improvements	8.0%	
Interest - Mortgages		
Heat, Light, Power & Water		
Insurance - Other		
Taxes - Other		
Equipment - Repairs		
Equipment - Depreciation	8.0%	
Equipment - Rental		
Aggregate Cost to Sell		80%
Operating Profit		20%

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Service Mechanical Department

Time Distribution for the Month of ________ 19 ____

	Sales	Rate	Hours		
Customer	$________	÷ $________	= ________	________	%
Internal	$________	÷ $________	= ________	________	%
Warranty	$________	÷ $________	= ________	________	%
Total	$________	Total Hours	________		100%

All hours should be billed at the customer rate.

Note: In a survey of profitable service dealers, customer labor repair orders averaged 2.2 hours sold per RO. Use the formulas below to determine your hours per RO.

$________ (Customer Labor Sales) ÷ ________ (# of ROs) = $________ (Dollars/RO)

$________ (Dollars/RO) ÷ $________ (Labor Rate) = ________ (Hours/RO)

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H-001440

1

CATEGORY	SALES		HOURS BILLED		ELR
CAR LABOR		÷		=	
TRUCK LABOR		÷		=	
WARRANTY LABOR		÷		=	
INTERNAL LABOR		÷		=	
NVI/RR LABOR		÷		=	

2

TOTAL LABOR SALES		÷		=	OELR

3

TOTAL LABOR SALES	-TOTAL LABOR GROSS	=LABOR COST
LABOR COST	÷HOURS BILLED	=REAL COST/HR

4

TOTAL LABOR RATES	÷# OF TECHS	=AVG. TECH RATE

5

LABOR COST	÷AVG. TECH RATE	=HOURS PAID

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H-001441

PERFORMANCE LEVELS

		Performance Level Averages	Current Level
Order efficiency			
PAD (stock order)		80%	________
TGT (specially priced parts)		80%	________
SSO (special order)		15%	________
CIO (car inoperative)		5%	________
VIP (unit down - critical)		5%	________
True turn		3.5-4.5 turns/year	________
Stock order allowance as a % of sales		4% minimum	________
Inventory turnover (turn)		5-6 times/year (2-2.5 months supply)	________
Inventory profile - sales movement range			
0-3 months		75% of inventory	________
4-6 months		23% of inventory	________
7-12 months		2% of inventory	________
Parts sales per parts employee	Domestic:	$25,000/month	________
	Import:	$27,000/month	________
Parts gross per parts employee	Domestic:	$8,000/month	________
	Import:	$9,000/month	________
Parts-to-labor ratio		.80 minimum	________
Pricing policy		Matrix when possible by parts numbers	________
Level of service (fill rate)		82%-92%	________
Parts gross profit percent sales (Without parts gross transfer)		38%	________

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HANDLING COST

Handling Cost

Where is your parts department generating its profit picture? You need to know your parts department's handling cost, in addition to actual parts cost, to determine your mark-up in each category-retail, counter, wholesale, internal shop and body shop. Refer to your financial statement to complete the formula below.

Total Parts Sales $______________

Total Gross Profit $______________

less (-) stock orders $______________

less (-) wholesale inventory $______________

less (-) parts inventory adj. $______________

less (-)

True Parts Gross $______________

Actual Cost Parts Sold $______________

$______________	÷	$______________	=	__________%
Actual Cost Parts Sold		Total Dept. Expense*		Handling Cost (25% or less)

(* When referring to Ford and Chrysler financial statements, add 14% allocation of dealership fixed expense and dealer salary to realize the actual department expense.)

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EXPENSES

	Personnel expense as a % of gross	Semi-fixed expense as a % of gross	Fixed expense as a % of gross	Total fixed overhead as a % of gross
Chrysler	33%	—	39%	72%
Ford	35%	—	31%	66%
GM	50%	15%	15%	80%
Honda	40%	15%	15%	70%
[illegible]	42%	13.5%	20%	75.5%
Mercedes/Benz	41%	13%	16%	70%
Nissan	48%	17%	15%	80%
Toyota	26%	20%	29%	75%
Current Percentages	__%	__%	__%	__%

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H-001444

CASH PLANNING WORK SHEET FOR ______________
(Month)

	Last Month	This Month	Next Month
1. Beginning Cash Balance			
Cash Receipts			
2. Open-account Collections			
3. Cash from New-truck Sales			
4. Cash from Used-truck Sales			
5. Parts and Service Cash Sales			
6. Lease and Rental Receipts			
7. Interest Received			
8. Finance Reserve Receipts			
9. Warranty Claims Receipts			
10. P&I Commissions Received			
11. Sales of Fixed Assets			
12. Borrowings			
13. Cash Received from Loans			
14. Sale of Stocks			
15. Other			
16. Other			
17. TOTAL RECEIPTS (#2 TO #16)			

	Last Month	This Month	Next Month
Cash Outlays			
18. Purchase of New Trucks Not Floored			
19. Purchase of Used Trucks Not Floored			
20. Payment of Parts Statements			
21. Payment of Trade Accounts			
22. Interest Paid - Floor Plan			
23. Payroll Including Bonuses			
24. Payroll Taxes Including FICA			
25. Fringe Benefits Paid			
26. Taxes - Sales			
27. Taxes - Other			
28. Taxes - Federal Income			
29. Taxes - State Income			
30. Payment on Note			
31. Payment on Mortgages			

H-001445

	Last Month	This Month	Next Month
Cash Outlays			
18. Purchase of New Trucks Not Floored			
19. Purchase of Used Trucks Not Floored			
20. Payment of Parts Statements			
21. Payment of Trade Accounts			
22. Interest Paid - Floor Plan			
23. Payroll Including Bonuses			
24. Payroll Taxes Including FICA			
25. Fringe Benefits Paid			
26. Taxes - Sales			
27. Taxes - Other			
28. Taxes - Federal Income			
29. Taxes - State Income			
30. Payment on Note			
31. Payment on Mortgages			
32. Purchases of Fixed Assets			
33. Rent			
34. Utilities			
35. Other Semi-fixed Expenses Paid			
36. Other Fixed Expenses Paid			
37. Dividends			
38. TOTAL OUTLAY (#18 TO #37)			
39. ENDING BALANCE (#1 TO #38)			

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H-001446

Exhibit (J)

DealerDashboard.com
PO Box 18137
670 Northland Blvd. 18137
Cincinnati, Ohio 45218
(513) 557-2901

Dealer Services Corporation

CONFIDENTIAL APPLICATION FOR FLOORPLAN LINE OF CREDIT

Form 1-300

BUSINESS INFORMATION

Exact Legal Name: Daryl Lee Leathers
DBA Name: 4 Brothers Auto Sales
Requested Floorplan Amount $: 100,000 **Business Type:** ☐ **Corporation** ☐ **Sole-Prop** ☑ **Partnership** ☐ **LLC**
Have you applied with DSC before? ☐ Yes ☑ No If Yes, When? What location?
Federal Tax ID 20-3789742 Dealer License # 6600036604 Expiration Date 05 31 08
State of Incorporation or Residence. Washington, DC State Tax ID
Phone #: 240-464-1260 Fax #: 301-856-3427 Business Email DL-EAT@hotmail.com
Physical Address: 2313 Pennsylvania Ave, SE Mailing Address 3300 Valley Forest Dr.
City, State, Zip, County: Washington, DC 20020 City, State, Zip, County Upper Marlboro, MD 20772

DEALERSHIP INFORMATION

☐ Own or ☑ Rent your Lot Dealership does ☑ Retail or ☐ Wholesale Only Year Business Started 2006 # of Employees 3
Average # of Sales/Mth: 5 Average Price/unit: 3500.00 # of vehicles lot will hold? 45 How many units on lot now? 25
Services you offer: ☐ Mechanical ☐ Insurance ☐ Warranties – List Name(s) of Warranty Co
☐ Consignment ☐ Body Shop ☐ BHPH – List Name(s) of Finance Co
Where are the majority of your units obtained? ☑ Auction ☐ Wholesalers ☐ Retailers ☐ Trade-Ins ☐ Internet ☐ Other Explain:

BANKING INFORMATION

Bank Name. ☑ Business ☐ Personal City, State Falls Church, VA Contact Name Tanzeela Azi
Checking Account #: 000515558879 Bank Routing #: Bank Phone #: 703-241-5057

FLOORPLANNING INFORMATION

Floorplan Finance Company Name: N/A Yr Start: Credit Line $ Balance $
Floorplan Finance Company Name Yr Start Credit Line $ Balance $

AFFILIATED AUCTIONS

Auction Name Tidewater YR Registered. 2007 Auction Access # 7691
Auction Name Manheim YR Registered 2007 Auction Access # 521974

INSURANCE INFORMATION

☐ I have physical damage insurance ☐ I do not have physical damage insurance Amount of Insurance $:
Insurance Carrier Classic Insurance Phone #: 301-699-3344 **Renewal Date:** 10-30-08

SIGNOR 1 INFORMATION

Principle Name: Daryl L. Leathers **Title:** Owner % of ownership 90%
Home address, City, State, Zip: 3300 Valley Forest Dr Upper Marlboro, MD 20772
☑ Own ☐ Rent Home Phone 301-499-1833 Cell Phone: 240-464-1260 **SS#:** 578-94-5773
Driver License #: L362135497927 Expiration Date 12 5 10 DOB 12 5 69

SIGNOR 2 INFORMATION

Principle Name: Annie Walker **Title:** Owner % of ownership 10%
Home address, City, State, Zip: 9016 Spring Acres Rd. Clinton, MD 20735
☑ Own ☐ Rent Home Phone: 301-856-3720 Cell Phone: **SS#:** 578-68-1633
Driver License # W426067585480 Expiration Date: 6 23 08 DOB 6 23 49

AGREEMENT

I hereby certify the information contained within this application and on any accompanying financial statements is true, complete, and accurate. I authorize DSC to obtain credit information from a credit bureau, and any financial institution or trade creditor that I have provided as well as any other credit investigation that DSC in DSC's sole discretion deems necessary. I also authorize DSC to contact any third parties and to disclose information including information contained in this application for the purpose of among other things, obtaining inter-creditor agreements and perfecting DSC's security interest. By submission of this Application Dealer expressly authorizes and agrees to accept all facsimile transmissions from DSC including, but not limited to account information and promotional materials

SIGNATURES

Signature: Daryl Leathers **Date:** 2/28/08 **Signature:** Annie M Walker **Date:** 2/28/08

H-001448

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Your Order #: 61173-84711-063
Order Date: 4/27/2002 4:59 PM
Order Status: Shipped
Payment Type: Visa
Ship Date: 4/30/2002
Ship Time (Est): 21 Days

Ship To:
DealerDashboard Administration

DealerDashboard.com
1951 Windmill Way
Cincinnati, OH 45240-3341
United States of America
Phone: 513.557.2901
DealerDashboard@hotmail.com

Bill To:
Wilma Melson
All Things Automotive
PO Box 18137
Cincinnati, OH 45218-0137
United States of America
Phone: 513.557.2901
DealerDashboard@hotmail.com

My Products	Quantity	Price	Subtotal
DealerDashboard.com **Item Status:** Shipped 4/29/2002 **Carrier:** United States Postal Service **Tracking #:** Not Available	250	$3.99	$3.99
DealerDashboard.com **Item Status:** Shipped 4/30/2002 **Carrier:** United States Postal Service **Tracking #:** Not Available	250	$4.99	$4.99
		Product Total:	$8.98
		Shipping & Processing (Slow 21 Days):	$8.05
		Total:	$12.04

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- Cards, Notes & Stationery
- Invitations & Announcements
- Rubber Stamps & Labels
- Home & Family
- Product Accessories
- Product Details

Services

- Postcard Marketing
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- Catalog Request
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Document Preview

#	Name	Details	Actions
	DealerDashboard.com	Product: Return Address Labels Created: 4/27/2002 Identification #: 61168-84728-G78	Rename

DealerDashboard.com
670 NorthLand Blvd.
P.O. Box 18137
Cincinnati, Ohio 45218-0137

Back

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- Promotional Giveaways
- Cards, Notes & Stationery
- Invitations & Announcements
- Rubber Stamps & Labels
- Home & Family
- Product Accessories
- Product Details

Services

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My Proofs
Access your documents' proofs.

Account Update
Change or update your account information.

My Favorites
View designs you have saved as Favorites.

Order History
Check order status and review previous orders.

My Images
Manage uploaded images, logos and pictures.

My Electronic Business Cards
Access your Electronic Documents.

My Mailing Lists
Upload mailing lists and manage your mailings.

Order Details

Printer-Friendly Order Summary

Your Order #: 76121-51912-2W9
Order Date: 3/23/2006 7:25 PM
Order Status: Shipped
Payment Type: MasterCard
Ship Date: 4/12/2006
Ship Time (Est): 21 Days

Ship To:
DealerDashboard Administration

DealerDashboard.com
77 Junedale Drive
Cincinnati, OH 45218
United States of America
Phone: 5135572901
DealerDashboard@hotmail.com

Bill To:
Michael E Dalton
All Things Automotive
PO Box 18137
Cincinnati, OH 45218-0137
United States of America
Phone: 5135572901
DealerDashboard@hotmail.com

Reorder

My Products	Quantity	Price	Subtotal
DealerDashboard.com Preview	250	$4.99	**$4.99**
Item Status: Shipped 4/12/2006 **Carrier:** DHL **Tracking #:** 96020239486			
Dealer Floor Plan Financing Retail Financing A to E Preview	100	$34.99	
Black & White Back Side		INCLUDED	
Glossy Finish		INCLUDED	**$34.99**
Item Status: Shipped 4/12/2006 **Carrier:** DHL **Tracking #:** 96020239486			
Magnet:DealerDashboard.com Preview	25	$12.99	**$12.99**
Item Status: Shipped 4/12/2006 **Carrier:** DHL **Tracking #:** 96020239486			

Product Total:	**$52.97**
Shipping & Processing (Slow 21 Days):	**$7.25**
Total:	**$28.72**

H-001452

Products

- Free Products
- Business Cards
- Business Identity
- Marketing Materials
- Promotional Giveaways
- Cards, Notes & Stationery
- Invitations & Announcements
- Rubber Stamps & Labels
- Home & Family
- Product Accessories
- Product Details

Services

- Postcard Marketing
- Creative Services
- Upload Your Own Design
- Free Logo Design
- Catalog Request
- Customer Support
- Request Samples
- Caricature Design
- Business Solutions

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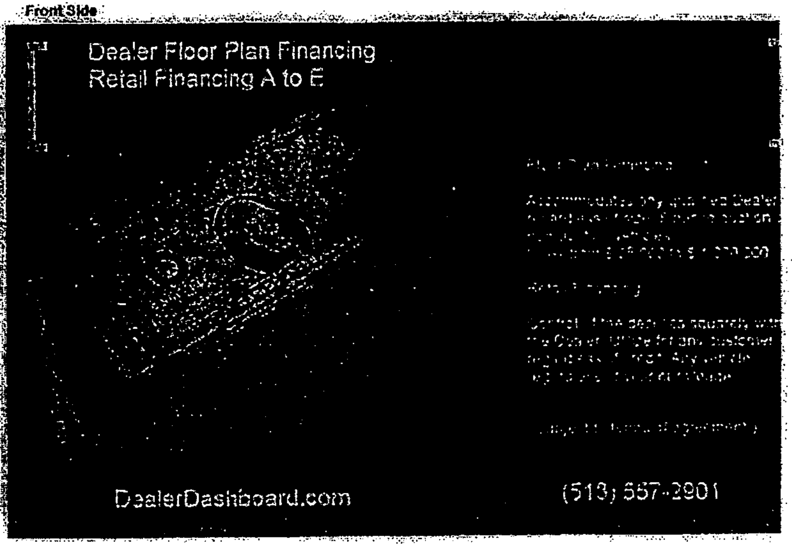
Document Preview

#	Name	Details	Actions
	Dealer Floor Plan Financing Retail Financing A to E	Product: Oversized Postcards Created: 3/23/2006 Identification #: 97460-51917-1U9	Edit Order Rename Save a Copy See Matching Documents Create a mailing

Front Side



Back Side

H-001453

DealerDashboard.com

(513) 557-2901

670 Northland Blvd.
PO Box 18137
Cincinnati, Ohio 45218-0137

APPLICATION AVAILABLE ONLINE

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- Help
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- Invitations & Announcements
- Rubber Stamps & Labels
- Home & Family
- Product Accessories
- Product Details

Services

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My Proofs
Access your documents' proofs.

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Change or update your account information.

My Favorites
View designs you have saved as Favorites.

Order History
Check order status and review previous orders.

My Images
Manage uploaded images, logos and pictures.

My Electronic Business Cards
Access your Electronic Documents.

My Mailing Lists
Upload mailing lists and manage your mailings.

Order Details

Printer-Friendly Order Summary

Your Order #:	80103-41159-4M8
Order Date:	6/7/2007 4:31 PM
Order Status:	Shipped
Payment Type:	Visa
Ship Date:	6/15/2007
Ship Time (Est):	21 Days

Ship To:
DealerDashboard Administration

DealerDashboard.com
77 Junedale Drive
Cincinnati, OH 45218
United States of America
Phone: 5135572901
DealerDashboard@hotmail.com

Bill To:
Michael E Dalton
DealerDashboard.com
PO Box 18137
Cincinnati, OH 45218-0137
United States of America
Phone: 5135572901
DealerDashboard@hotmail.com

Reorder

My Products	Quantity	Price	Subtotal
Dealer Floor Plan Financing Retail Financing A to E	100	$17.49	
Preview			
Black & White Back Side		INCLUDED	
Glossy Finish		INCLUDED	$17.49
Item Status: Shipped 6/15/2007 **Carrier:** USPS Priority Mail **Tracking #:** Not Available			
DealerDashboard.com	1	FREE	
Preview			
Small Housing - Black		INCLUDED	
Black Ink		INCLUDED	FREE
Item Status: Shipped 6/15/2007 **Carrier:** United States Postal Service **Tracking #:** Not Available			
Free QuickBooks		$2.12	$2.12
Item Status: Shipped 6/13/2007 **Carrier:** United States Postal Service **Tracking #:** Not Available			
		Product Total:	**$19.61**

H-001455

Home | Specials | Select a Country | En Español | Order Status | Help   Log Out | My Account   Cart

Products

- Free Products
- Business Cards
- Business Identity
- Marketing Materials
- Promotional Giveaways
- Cards, Notes & Stationery
- Invitations & Announcements
- Rubber Stamps & Labels
- Home & Family
- Product Accessories
- Product Details

Services

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- Free Logo Design
- Catalog Request
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- Request Samples
- Caricature Design
- Business Solutions

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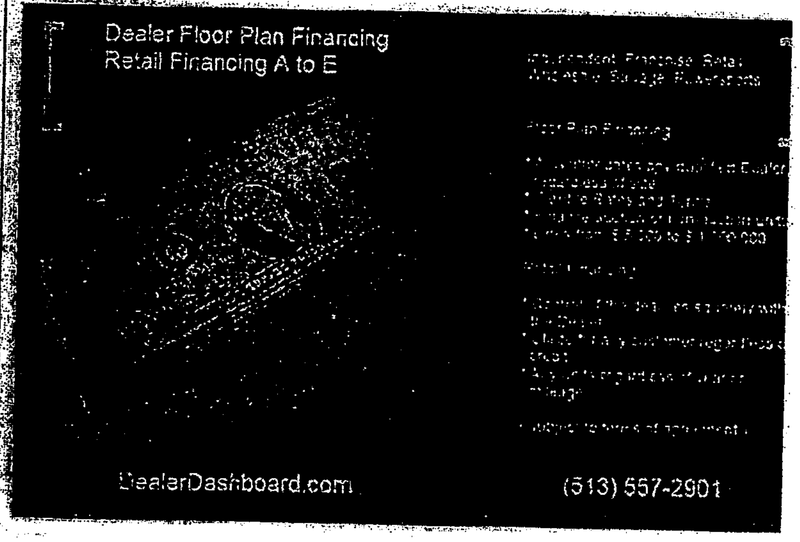
Document Preview

#	Name	Details	Actions
	Dealer Floor Plan Financing Retail Financing A to E	Product: Oversized Postcards Created: 6/7/2007 Identification #: 04562-41151-8J4	Edit Order Rename Save a Copy See Matching Documents Create a mailing

Front Side



Back Side

H-001456

DealerDashboard.com

(513) 557-2901

670 Northland Blvd.
PO Box 18137
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APPLICATION AVAILABLE ONLINE

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  - T-Shirts
  - Hats
  - Women's Apparel
  - Premium Collection
  - Woven Shirts
  - Sweatshirts & Sweaters
  - Workwear
  - Medical Attire
  - Bags
  - Accessories
  - Big and Tall
  - Outerwear
  - Kid's Corner
  - Value Products
  - Closeouts
  - Sale Items
  - Sale Items - Women's
  - Novelty Items
  - Eco-Friendly
- PRINTED
  - All Products
  - Men's Polos
  - T-Shirts and Sweatshirts
  - Women's Apparel
  - Woven Shirts
  - Kid's Corner
  - Sale Items
- Gift Certificates

Your Account

- Account Details
- Logo Locker
- Affiliate Program
- View Orders
- Sign Out
- Contact Us

View Cart

Style	Qty	Total
Your cart is empty.		

4-Piece Minimum
Mix & Match Styles

Current/Active Order List

Click on an order number to see the current status of the order.

Order #	Date Placed	Grand Total	Clone Order to Cart

Shipped or Inactive Order List

Click on an order number to see what you ordered.
Please note: Order history is available online for orders placed since February 6, 2006.

Order #	Date Placed	Grand Total	Clone Order to Cart
432748	11/14/2006 3:17 PM UPS tracking number: 1Z06415W0368863884	$50.00	Clone Order
437199	12/11/2006 7:42 AM UPS tracking number: 1Z06415W0369588422	$39.60	Clone Order
465138	6/12/2007 1:04 PM UPS tracking number: 1Z06415W0369031619	$39.80	Clone Order
473858	7/31/2007 8:26 AM UPS tracking number: 1ZRW51250346385884	$59.80	Clone Order

Cloning an Order?

To clone an order, click on the "Clone an Order" link to the right of the order you wish to clone. This will create an identical copy of your previous order including styles, sizes, and colors. It will use the same logo that were used with your previous order. If that logo has been deleted, it will use your currently active logo.

Please Note: If you currently have embroidered items in your cart and you clone an order that was for printable items, the embroidered items in your cart will be removed. The same will apply if you have printable items in your cart and are cloning an embroidery order.

Questions? Contact our Customer Service Department at 1 (800) 847-4478 from 8am to 6pm EST.

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Your Customer Number is 514736

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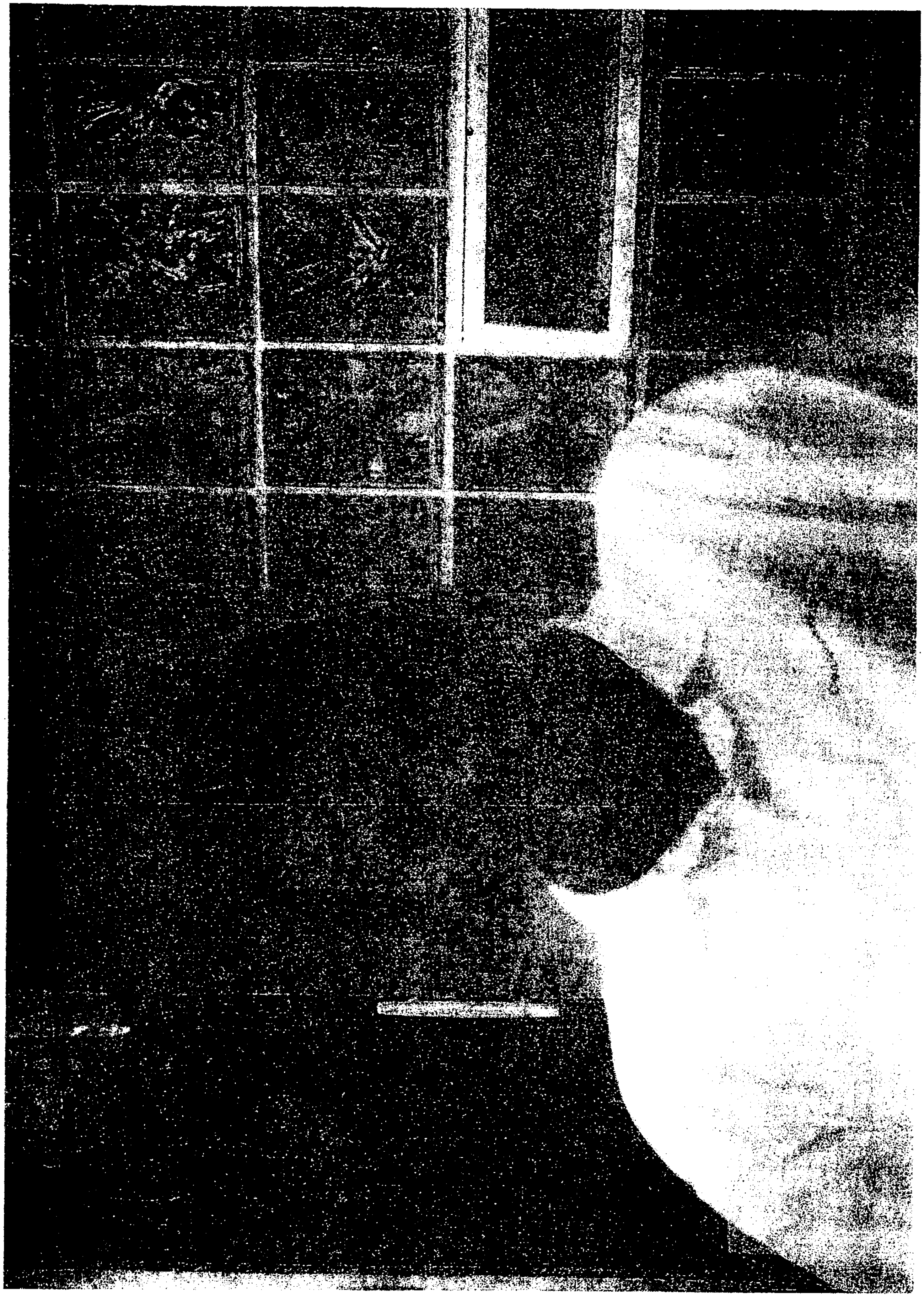

Nov. 30, 1999 - ***Michael Mason & Co. Ltd.***, a Canadian Car Dealer Supply and Internet Company, and ***STM International***, its training and Internet partner, both headquartered in Victoria, British Columbia, announced today that they have appointed *DealerDashboard.com* , of Cincinnati, OH, its sole US agent and partner.

Michael Mason & Co. Ltd. and STM International operate 3 networks:

- SellMoreCars.com, which is a dealer-only wholesale network with discount-to-dealer listings and an online dealer-to-dealer wholesale auction;
- CanadianUsedCars.com, a retail used car network; and the new
- AmericanUsedCars.com - providing US dealers with a similar retail network.

SellMoreCars.com is the fastest growing automotive network in western Canada, and is the most sophisticated of its kind.

Michael Mason & Co. Ltd. is a manufacturer and distributor of a wide variety of dealer supplies.

STM International manufactures and distributes a variety of comprehensive sales and sales management manuals.

'This news release has not yet approved by all parties'

DEALER SERVICES CORPORATION

DEALER SERVICES CORPORATION
AGENT AGREEMENT

This Agent Agreement ("Agreement") is made and effective this _____ day of _________________, 20____,

BETWEEN: **Dealer Services Corporation** (the "Company"), a corporation organized and existing under the laws of Delaware, with its head office located at 11555 N. Meridian St., Suite 220, Carmel, Indiana 46032;

AND: ____ ("Agent"),

residing at: ____

____

DEFINITIONS:

Capitalized terms used herein shall have the respective meanings as set forth as follows:

1. "Agreement" shall mean this Dealer Services Corporation Agent Agreement.

2. "Application" shall mean the completed Company dealer application form, a copy of the dealer's and all guarantors of the dealer's driver's license, a dealer voided check, a copy of dealer's certificate of insurance or an election by dealer on dealer's application form to enroll in Company's physical damage insurance program, a copy of the dealer's license and Articles of Incorporation if the dealer is incorporated or Articles of Organization if dealer is a limited liability company.

3. "Base Commission" shall mean the one time payment due Agent from Company for the delivery of an Application by Agent to Company.

4. "Contract Activation Date" shall mean the first date a specific dealer's line of credit with the Company may be used by dealer.

5. "Contracted Dealer" shall mean the specific dealer identified in the Application.

6. "Program" shall mean Company's retail floorplan, wholesale floorplan, rent to own floorplan, daily rental floorplan, salvage floorplan or power sports floorplan that is offered to dealers.

7. "Residual Commission" shall mean the payment due Agent from Company for incremental usage by dealer

8. "Unit" shall mean any manufactured item, including vehicles for which a certificate of title or a MSO exists which floor planned by a dealer.

AGENT OBLIGATIONS:

1. Use his best efforts to collect Applications for the Company in the geographic area known as ____.

2. Clearly identify himself as a duly authorized agent of the Company in the course of his efforts to collect Applications on behalf of the Company.

3. Accurately represent and state Company Application requirements and Programs.

4. Promptly deliver all received Applications to the Company.

5. Inform the Company if the Agent is representing, or plans to represent any other company engaging in inventory floor plan financing. In no event shall Agent represent a competitive inventory floorplan company or promote any other inventory floorplan finance product line besides that of Company either within or outside the aforementioned geographic area.

6. Provide Company Fourteen (14) day's notice should the Agent intend to terminate this Agreement.

7. Return promptly all materials provided by the Company to the Agent, if either party terminates this Agreement.

8. Abide by all Company policies as directed by Company.

COMPANY OBLIGATIONS:

1. Pay Agent the following Program commissions as follows:

   a. Base Commission

      $75.00 for each unique Application resulting in at least one (1) floor planned Unit.

   b. Residual Commission

      $5.00 for each vehicle floor planned by Contracted Dealer within the initial 12 months of the Contract Activation Date.

      $2.00 for each vehicle floor planned by Contracted Dealer after the initial 12 months and before the initial 24 months of the Contract Activation Date.

      $1.00 for each vehicle floored by Contracted Dealer after 24 months and before 60 months of the Contract Activation Date.

2. Except by special arrangement, the following shall not be commissioned:

   a. Contracted Dealers acquired by Company which were not as a result of an Application delivered to the Company by Agent

   b. Any Unit floor planned by Contracted Dealer after the initial 60 months following contracting date by Company.

   c. Any other Contracted Dealer activity unless mutually agreed in writing between Company and Agent.

3. Provide the Agent with reasonable quantities of brochures and any other materials required for purposes of Agent's duties under this Agreement.

4. Grant Agent thirty (30) day's notice should the Company wish to terminate this Agreement. However, Company may terminate the Agreement and immediately in the event Agent violates Company policy.

5. Pay Base and Residual Commissions due Agent by Company on the 15^{th} of the month following the month earned. If the 15^{th} of the month falls on a holiday or weekend, then commissions due shall be paid to Agent on the next business day.

MISCELLANEOUS:

1. This Agreement represents the entire agreement of the parties relating to the subject matter hereof and this Agreement may be modified only by a writing signed by both parties.

2. In this Agreement, the singular includes the plural and the masculine includes the feminine.

3. Agent authorizes Company to perform any background checks, including but not limited to credit and criminal checks, on Agent as Company deems necessary.

4. Agent acknowledges and agrees that Agent is an independent contractor and is not an employee, servant, partner, or joint venturer of the Company and that Company is not responsible for withholding , and shall not withhold, FICA or taxes of any kind from any payments Company owes Agent. Agent shall not be entitled to receive any benefits which employees of the Company are entitled to receive and shall not be entitled to worker's compensation, unemployment compensation, medical insurance, dental insurance, life insurance, paid vacations, paid holidays, 401(k), pension, profit sharing, or Social Security on account of Agent's work for the Company.

5. Agent acknowledges and agrees that Agent shall forfeit future all unpaid commissions in the event Company determines Agent has violated Company policy.

6. Agent acknowledges and agrees (a) that all intellectual property and any other plans, specifications, designs and other documents and materials created pursuant to this Agreement or related to the services to be provided hereunder and any information, work in progress, trade secrets or other secret or confidential matter related to the business or projects of the Company constitute confidential information ("Confidential Information") and (b) that the Agent shall not use, copy or disclose to any person, firm or corporation any such Confidential Information, unless such use, copying or disclosure is necessary to accomplish the Agent's duties hereunder.

7. Agent acknowledges and agrees that the terms of this Agreement are in addition to and do not detract from the fiduciary duties imposed by law and owed by the Agent to the Company.

8. This Agreement binds the parties and their respective heirs, executors, administrators, personal representatives, successors and assigns.

9. Agent shall not assign the benefit of this Agreement or subcontract his obligations under this Agreement. The Company may assign any or all of its rights and duties under this Agreement at any time and without the consent of Agent.

10. The failure of either party to this Agreement to insist upon the performance of any of the terms and conditions of this Agreement shall not be construed as waiving any such terms and conditions, and they shall continue and remain in full force and effect as if no such forbearance or waiver had occurred.

11. The invalidity of any portion of this Agreement will not and shall not be deemed to affect the validity of any other provision. In the event that any provision of this Agreement is held to be invalid, the parties agree that the remaining provisions shall be deemed to be in full force and effect.

12. The validity, enforceability and interpretation of this Agreement shall be governed by the laws of the State of Indiana without regard to conflicts of laws provisions thereof. The state and federal courts located in Indianapolis, Indiana shall have jurisdiction to determine any claim or dispute pertaining to this Agreement and said courts shall be the proper venue for any such claim or dispute. Agent expressly consents to such jurisdiction and venue and waives any claim of inconvenient forum with respect to any action brought in such court.

13. In the event that any action is filed in relation to this Agreement, the unsuccessful party in the action shall pay to the successful party, in addition to all the sums that either party may be called on to pay, a reasonable sum for the successful party's attorney's fees.

14. AGENT AND COMPANY, AFTER CONSULTING OR HAVING HAD THE OPPORTUNITY TO CONSULT WITH COUNSEL, KNOWINGLY, VOLUNTARILY AND INTENTIONALLY WAIVE ANY RIGHT IT MAY HAVE TO A TRIAL BY JURY IN ANY LITIGATION BASED UPON OR ARISING OUT OF THIS AGREEMENT.

15. Company represents and warrants that Company is qualified to transact business in all States, that the Company has full right, authority and power to enter into this Agreement and to perform its obligations hereunder, that the person signing this Agreement on behalf of Company is authorized to do so and that this Agreement is binding upon Company in accordance with its terms.

Signed this _____ day of _________________, 200_.

AGENT	**DEALER SERVICES CORPORATION**
______________________	______________________
Agent's Signature	Authorized Signature
______________________	______________________
Print Name	Print Name and Title

INNOVATIONLINE
BETTER BUSINESS THROUGH TECHNOLOGY

WHAT'S NEW ON iN

INNOVATION HOME

WHAT'S NEW ON iN

Setting Up iN Access for Your Dealer Principal and GM - Dashboard Application

The Dashboard runs much the same as any application on the Interactive Network with one difference. When the account is set up correctly for your Dealer Principal and General Manager, the Dashboard will appear *before* the customary iN home page.

When your account user drills down to see a more detailed report and leaves the Dashboard, getting back to it can immediately be done by clicking the Dashboard icon next to help (upper right) or by going to the Executive Management page and clicking the left menu item, Dashboard.

Definition of the Dashboard

The Dashboard is a management tool providing timely reports for dealership Sales, Service, and Parts departments. It allows your dealership management to view key indicators of how your dealership is performing.

As the iN Administrator, you can set up the **Dealer Principal and General Manager** exactly as you would any typical user account. However, to ensure that the Dashboard appears immediately after your account owner signs in, you will need to check a box for at least one of these **job codes** :

- PA0023
- WA0023
- PA0024
- WA0024

Doing so provides the full ability for a dealer principal or GM with this account to "drill down" to the report that is the originating source for the Dashboard information. Providing access for the Principal and GM is based on using their correct job code in their iN user account. It is not an acceptable practice to assign these job codes to individuals at a dealership who, in fact, do not serve in either role.

Can I give other iN accounts Access to the Dashboard?

Yes, other people (your dealership management team, for example) that already have active iN user accounts can be given access checking the Dashboard checkbox under Executive Management. However, it is advisable to get the approval of the dealer principal and/or GM before assigning access to the Dashboard for the account. When given access, these accounts will then have the Dashboard icon on the top right of the home page and can access the Dashboard menu item from the *Executive Management* landing page.

Security Note: Checking the access box for Dashboard for an iN account that is not the principal or GM will permit the user to see the Dashboard. However, drill downs from the Dashboard will only be to those reports that the person would normally see based on his/her current access. In other words, if a dealer Sales Manager does not currently have access to MOVE, he/she will not be able to drill down from the Dashboard to access the MOVE application, even though rollup information about MOVE is shown on the Dashboard.

Here is a list of reports and their update frequency that your executive will be able to see on the Dashboard:

Under the Sales Tab

- **Owner Link Registrations** - Updated daily
- **Retail Sales Summary** - Updated real-time
- **Dealer Inventory** - Updated daily
- **Certified Used Car Sales** - Updated real-time
- **iSky Telephone Survey** - Updated monthly
- **EXCELL Validation** - Updated monthly
- **Cross Sell** - Six reporting periods for months of February, April, June, August, October, and December.
- **MOVE Allocation** - Updated real-time

H-001470

- **eSales to eShopping Leads** - Updated monthly
- **Lead Response** - Updated daily
- **President's Award/Precision Award** - Updated monthly

Under the Service Tab

- **TSI & SRS** - Updated monthly
- **Service Appointments** -Updated monthly

Under the Parts Tab

- **eStore Accessories** - Updated Monthly

H-001471

Enter Web Address: http:// All Take Me Back Adv Search Compare Archive Pages

Searched for http://dealerdashboard.com **184** Results

Note some duplicates are not shown. See all
* denotes when site was updated.
Material typically becomes available here 6 months after collection. See FAQ

Search Results for Jan 01, 1996 - Sep 29, 2007

1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
0 pages	0 pages	0 pages	0 pages	21 pages	20 pages	6 pages	19 pages	28 pages	15 pages	34 pages	17 pages
				Feb 29, 2000 *	Feb 04, 2001 *	Jan 23, 2002	Feb 01, 2003	Jan 24, 2004 *	Jan 30, 2005 *	Jan 01, 2006	Jan 16, 2007 *
				Mar 01, 2000	Feb 08, 2001	Feb 04, 2002	Feb 08, 2003 *	Jan 25, 2004	Feb 06, 2005	Jan 25, 2006 *	Jan 21, 2007
				May 10, 2000 *	Feb 24, 2001 *	Oct 02, 2002 *	Feb 11, 2003	Feb 02, 2004 *	Feb 09, 2005 *	Jan 26, 2006	Jan 27, 2007
				May 18, 2000 *	Feb 26, 2001 *	Nov 26, 2002 *	Feb 20, 2003 *	Mar 21, 2004 *	Feb 13, 2005 *	Feb 03, 2006 *	Feb 03, 2007
				May 20, 2000 *	Mar 01, 2001	Nov 28, 2002 *	Mar 23, 2003	Apr 07, 2004	Feb 26, 2005 *	Feb 05, 2006	Mar 17, 2007
				Jun 17, 2000 *	Mar 02, 2001	Nov 30, 2002 *	Mar 25, 2003 *	Apr 18, 2004	Mar 07, 2005	Feb 23, 2006	Apr 07, 2007
				Jun 19, 2000	Mar 09, 2001 *		Apr 08, 2003	May 19, 2004	Mar 11, 2005	Mar 14, 2006 *	May 04, 2007
				Jun 20, 2000	Mar 31, 2001 *		Apr 11, 2003 *	Jun 02, 2004	Apr 03, 2005	Mar 19, 2006	May 28, 2007
				Aug 15, 2000 *	Apr 02, 2001		May 24, 2003	Jun 03, 2004	Apr 08, 2005	Mar 25, 2006	Jun 03, 2007
				Aug 22, 2000	Apr 09, 2001 *		Jun 02, 2003	Jun 06, 2004	Aug 31, 2005 *	Apr 06, 2006 *	Jul 02, 2007
				Aug 23, 2000	May 16, 2001 *		Jul 17, 2003 *	Jun 07, 2004	Sep 06, 2005	Apr 26, 2006	Jul 04, 2007
				Sep 29, 2000	May 18, 2001 *		Jul 23, 2003 *	Jun 08, 2004	Nov 04, 2005 *	Apr 27, 2006	Aug 18, 2007
				Oct 09, 2000 *	Jun 19, 2001 *		Aug 02, 2003	Jul 28, 2004 *	Dec 11, 2005	Apr 28, 2006	Aug 20, 2007
				Oct 17, 2000 *	Jul 02, 2001 *		Oct 03, 2003 *	Aug 13, 2004	Dec 23, 2005	May 12, 2006 *	Aug 21, 2007
				Oct 18, 2000	Jul 10, 2001		Oct 20, 2003 *	Aug 25, 2004	Dec 31, 2005	May 14, 2006	Aug 24, 2007
				Oct 19, 2000	Aug 04, 2001		Nov 18, 2003 *	Sep 01, 2004		Jun 18, 2006 *	Aug 26, 2007
				Nov 09, 2000 *	Sep 23, 2001 *		Nov 26, 2003 *	Sep 05, 2004		Jun 23, 2006	Aug 28, 2007
				Nov 10, 2000 *	Oct 24, 2001 *		Dec 15, 2003 *	Sep 22, 2004		Jul 10, 2006	
				Dec 02, 2000 *	Nov 30, 2001 *		Dec 16, 2003 *	Sep 25, 2004		Aug 06, 2006	
				Dec 03, 2000	Dec 11, 2001			Sep 26, 2004		Aug 13, 2006	
				Dec 04, 2000				Oct 11, 2004		Aug 15, 2006	
								Oct 25, 2004		Aug 20, 2006	
								Oct 26, 2004		Sep 01, 2006	
								Oct 28, 2004		Oct 04, 2006	
								Oct 29, 2004		Oct 06, 2006	
								Dec 03, 2004 *		Oct 12, 2006 *	
								Dec 04, 2004		Oct 20, 2006	
								Dec 10, 2004		Oct 24, 2006	
										Oct 25, 2006	
										Nov 04, 2006	
										Nov 13, 2006	
										Nov 19, 2006 *	
										Dec 05, 2006	
										Dec 07, 2006	

DealerDashboard

The COMMERCIAL / BUSINESS LENDER DIRECTORY

Covering all 50 states
Includes Regional and Nationwide Lenders

This exclusive directory lists current active lending sources with hundreds of millions of dollars in loan money waiting for you !

85 Pages of lending sources including:			
Mortgage Bankers Venture Capital Firms Savings and Loans	Pension Funds/Advisors Life Insurance Companies S.B.I.C. & M.E.S.B.I.C. Lenders	Credit Companies Leasing Companies Commercial Banks	Foreign Lenders S.B.A. Offices Private Companies And More
Lenders are listed by name, address and telephone, and are categorized by area, preference, type of project, type of financing, and size of loan.			

Commercial Mortgage Lenders

Over 400 commercial mortgage lenders, plus 70 foreign lenders, plus 50 pension fund sources to fund your specific real estate projects.

This exclusive directory includes lenders for almost any type of mortgage and real estate financing including:			
Single Family Homes Condominiums Apartments Mobile Home Parks	Hotels/Motels Health Care Centers Office Buildings Shopping Centers	Medical Buildings Retail Centers Land Farms	Mini Warehouses Restaurants And Much More

Types of financing includes:			
Long Term Permanents Immediate Funding Adjustable Mortgages	Short term Financing Forward Commitments Standby Commitments	Letters of Credit Conforming Residential Joint Ventures	Construction Loans Second Mortgages Jumbo Residential

Commercial Finance Lenders

Over 90 commercial finance lenders, plus 68 S.B.A. offices, plus 100 leasing sources to fund your specific business loans.

The "Commercial Finance" section lists sources for loans as low as $10,000, to loans in the millions of dollars for all types of business loans. These loans are secured by furniture, fixtures, equipment, inventory, receivables, and/or real estate. They are obtained for the purpose of expansion, purchase, refinance, or equipment leasing.

S.B.I.C. & M.E.S.B.I.C. Lenders

Over 140 offices listed representing 90% of the industry's resources, located in all parts of the country.

S.B.I.C.'s (Small Business Investment Companies) and M.E.S.B.I.C.'s (Minority Enterprise Small Business Investment Companies) are financial institutions created to make equity capital and long-term credit available to small independent businesses. They are licensed by the federal government's Small Business Administration, but are privately organized and privately managed firms which set their own policies and make their own investment decisions (pledging to finance only small businesses). Literally thousands of owners of profitable businesses can tell you how much they have benefited from the dollars and management counseling made available to them by S.B.I.C. and M.E.S.B.I.C. lenders.

Venture Capital Lenders

Over 240 venture capital sources to fund your specific high risk, high reward loans.

A venture capitalist invests in companies in fields where the risks are high but the potential rewards are great. A groundswell of entrepreneurs has risen to satisfy the desire of venture capitalists to invest in new companies and with better funding, added experience, and more investment opportunity to choose from. Venture capital firms are almost as varied as the companies they invest in. In general, independent private venture firms are the major source of venture capital and supply equity financing to new and expanding businesses. They raise pools of capital from a wide range of investors, corporations, insurance companies, pension funds, university endowments, and wealthy individuals. They invest in everything from seed and start-up situations to leveraged buyouts. When a company is formed it is commonly funded in three stages, which all fall under the term of "early-stage financing". These include seed financing, start-up financing, or first-round financing. Once a company is generating revenue, it seeks later-round financing, which includes, second-round financing, third-round financing, mezzanine or bridge financing, or leveraged buyouts.

Our Directory is continuously updated and you will receive our most current version. This exclusive Lender Directory will place you on the leading edge of financing abilities.

The Commercial / Business Lender Directory

PayPal Buy Now

DealerDashboard.com | Po Box 18137 | Cincinnati, Ohio 45218-0137
Email Us | Phone: (513)557-2901 | Fax: (309)215-9770

Exhibit (T)

DealerDashboard

From: "Amanda Kern" <akern@discoverdsc.com>
Date: Friday, March 28, 2008 10:01 AM
To: "DealerDashboard" <DealerDashboard@hotmail.com>
Subject: RE: Estimate please

Okay, what I CAN give you is this:

4 Active dealers.....who in combination have floored 135 units. Your commissions since inception has been $1085.00. I'm not able to give you the dealers line amounts or availability.

Thanks,
Amanda

From: DealerDashboard [mailto:DealerDashboard@hotmail.com]
Sent: Thursday, March 27, 2008 4:44 PM
To: Amanda Kern
Subject: Re: Estimate please

Sending now.

From: Amanda Kern
Sent: Thursday, March 27, 2008 3:32 PM
To: DealerDashboard
Subject: RE: Estimate please

Michael,
After speaking with our legal advisor here, he states he would like to see a copy of the Interrogatory and we will make a decision if we will disclose that information.

Please fax that to me asap!
1-866-534-5532

Thanks,
Amanda

From: DealerDashboard [mailto:DealerDashboard@hotmail.com]
Sent: Thursday, March 27, 2008 3:14 PM
To: Amanda Kern
Subject: Estimate please

Amanda:

I am in a trademark dispute with someone attempting to stop my registration. I am currently completing interrogatories. Could you quickly provide me with the number of dealers currently available for floor plan and the total credit line available combined.

For example total 4 dealers combined 1,00,000 available line.

I have to submit this by tomorrow. sorry for the quick action.

H-001480

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 78/339,571
Published: May 30, 2006 at TM 674
Mark: DEALERDASHBOARD

HONDA MOTOR CO., LTD.,	)	Opposition No. 91/173,105
	)	
Opposer,	)	
	)	NOTICE OF RELIANCE
v.	)	
	)	
MICHAEL DALTON,	)	
	)	
Applicant	)	
	)	

TAB B

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 78/339,571
Published in the Official Gazette of May 30, 2006 at TM 674
MARK: DEALERDASHBOARD

--x

Honda Motor Co., Ltd.,

Opposition No. 91173105

Opposer,

v.

Michael Dalton,

Applicant.

--x

OPPOSER'S FIRST
SET OF INTERROGATORIES TO APPLICANT

Pursuant to Rule 33 of the Federal Rules of Civil Procedure and Rule 2.120 of the Trademark Rules of Practice, Opposer Honda Motor Co., Ltd. ("Opposer") hereby requests that Applicant Michael Dalton ("Applicant") answer the following interrogatories fully and separately, in writing and under oath on the 30th day from service hereof. These requests are continuing and impose upon Applicant the obligations stated in Rule 26(e) of the Federal Rules of Civil Procedure.

DEFINITIONS AND INSTRUCTIONS

A. As used herein, "Opposer" includes Honda Motor Co., Ltd. and its related entities and their officers, directors, employees, agents and representatives.

B. As used herein, "Applicant" includes Michael Dalton, and all related and affiliated legal or business entities and other persons acting or purporting to act on his behalf.

C. As used herein, "Applicant's Mark" means Applicant's DEALERDASHBOARD mark in any type face or design, alone or in combination with other words and/or designs, including but not limited to the mark that is the subject of U.S. Trademark Application Serial No. 78/339,571.

D. "And" as well as "or" shall be construed disjunctively or conjunctively as necessary to bring within the scope of the interrogatory all information that might otherwise be construed to be outside its scope.

E. The singular shall include the plural and the present tense shall include the past tense and vice versa in order to bring within the scope of the interrogatory all information that might otherwise be construed to be outside its scope.

F. (1) Whenever an interrogatory inquires about the identity of an individual, the information requested includes:

(a) The person's full name;

(b) The person's employer, or business affiliation and address;

(c) The person's position or title; and

(d) The person's last known address and telephone number.

(2) Whenever an interrogatory inquires about the identity of a corporation, division, agency, association or other entity, the information requested includes its full name and current address.

G. If any of the requested information is withheld under a claim of privilege or other protection, produce within 10 days of the date on which responses are required pursuant to these interrogatories, a log of the information withheld sufficient to evaluate the privilege claimed that, at a minimum, separately identifies: (a) all persons who know the information or participated in any conversation about or consideration of the information, and each such person's job title, last known address and telephone number, and whether such person is an attorney; (b) the basis of any privilege claim; and (c) a description of the subject matter of the information.

H. If the information furnished in answer to all or any part of an interrogatory is not within Applicant's personal knowledge, state the name to whom all or any part of the information furnished is a matter of personal knowledge, and the name of the person(s) who communicated to you any part of the information furnished.

I. If any document, thing or source of information identified in answer to an interrogatory has been destroyed, with regard to such destruction state: (a) the date of such destruction; (b) the reason for such destruction; (c) the identity of the person or persons who destroyed the document, thing or source of information; and (d) the identity of the person or persons who authorized such destruction.

J. These interrogatories are continuing so as to require Applicant's further and supplemental responses in accordance with the Federal Rules of Civil Procedure.

K. "Communication(s)" means the exchange of information between any person or entity by or through any mode or medium including, but not limited to, the spoken word, written or electronic correspondence, face-to-face meetings and/or conveying information through third persons.

L. "Document(s)" shall be defined as synonymous in meaning and equal in scope to the use of that term in Fed. R. Civ. P. 34(a) and applicable case law, and shall include, without limitation, "things," electronic mail, drawings and information in computer-readable format, and "writings" and "recordings" as defined in Fed. R. Evid. 1001.

M. "Identify" shall mean with respect to a document, the production number of the document (if applicable) and if there is no production number, the type of document, general subject matter, date of the document, author(s), addressee(s) and recipient(s) and its current location.

N. "Person" means: (a) any natural person or individual or (b) any entity, whether business, legal, governmental, or other, regardless of purpose and regardless of whether or not for profit, including, but not limited to, any corporation, partnership, sole proprietorship, organization, club, committee, joint venture, foreign corporation or foreign entity, or any associate, general partner, limited partner, employee, subsidiary, parent, or other affiliate of any such entity.

O. "Concerning" shall mean relating to, referring to, describing, evidencing or constituting.

INTERROGATORIES

1. Describe the nature of the business conducted by Applicant.

2. State each name under which Applicant has done or is doing business, and state the address for, and dates during which, Applicant was or is doing business under such name.

3. Identify (by name and title) each of Applicant's employees responsible for the promotion, sale and distribution of the products or services Applicant has sold or intends to promote or sell in connection with Applicant's Mark.

4. Identify each and every product or service sold bearing Applicant's Mark

5. State the first date on which Applicant offered for sale any product or service bearing Applicant's Mark.

6. State the specific manner in which Applicant's Mark has been used by Applicant.

7. Identify every person who was responsible for or who participated in the selection and adoption of Applicant's Mark.

8. Describe in detail the reasons Applicant selected Applicant's Mark and identify all trademark search reports pertaining to that selection.

9. Identify all searches of any type conducted by or on behalf of Applicant in connection with the decision to adopt, use, or apply for federal registration of Applicant's Mark.

10. Describe in detail any discussions Applicant had with others concerning the adoption and selection of Applicant's Mark, and identify any other marks considered for adoption and/or selection.

11. Identify the commercial impression Applicant intends to create by use of Applicant's Mark in commerce.

12. Identify and describe in detail the channels of distribution and the geographical areas of trade within which Applicant has sold any product or service bearing Applicant's Mark.

13. Identify the class of purchasers to whom Applicant intended to promote, advertise and/or sell products or services bearing Applicant's Mark, including the demographics of the ultimate consumers of products or services bearing Applicant's Mark.

14. Identify (by title, publisher, page number, issue date, URL, air date(s), broadcast media outlet(s), and any other relevant designation), those printed and electronic publications, and media advertisements (such as internet advertisements, cable, television and/or radio adverstisements), in which Applicant has promoted products or services bearing Applicant's Mark.

15. Identify all wholesale outlets, retail outlets, distributors and websites that have promoted, advertised, sold and/or offered for sale products or services bearing Applicant's Mark.

16. Identify representative examples of each different promotional document and item used and being considered for use by Applicant in connection with the promotion and sale of products or services bearing Applicant's Mark.

17. Identify (by name, date and location) each marketing venue (such as a promotional event, trade show or fair) where Applicant has promoted any product or service bearing Applicant's Mark.

18. State in dollars and number of units each of Applicant's sales or projected sales of products or services bearing Applicant's Mark.

19. State in dollars Applicant's yearly advertising and promotional budget or projected yearly advertising and promotional budget for any product or service bearing Applicant's Mark.

20. Identify any market research (including surveys, studies, investigations and focus group inquiries) conducted by or on behalf of Applicant regarding Applicant's Mark, and state the results thereof.

21. Identify those persons having the most knowledge of any market research (including surveys, studies, investigations and focus group inquiries) conducted by or on behalf of Applicant regarding Applicant's Mark.

22. Describe any instance, whether by written correspondence, telephone call or other communications, in which any person or business entity:

(a) has by word or deed suggested a belief that any product or service bearing Applicant's Mark was licensed or sponsored by or otherwise associated or connected with Opposer or with Opposer's use of the terms "Dashboard" or "Dealer Dashboard"

(b) has by word or deed suggested a belief that any product or service bearing Applicant's Mark was advertised, distributed or offered for sale by Applicant under the control of or in any manner in association with or related to Opposer; or

(c) has been in any way confused, mistaken or deceived as to the origin or sponsorship of any product or service bearing Applicant's Mark. Examples of such confusion, mistake or deception include, but are not limited to, instances of misdirected mail or e-mail, misdirected inquiries, misdirected invoices or misdirected deliveries.

23. State the date and describe the circumstances in which Applicant first became aware of Opposer's use of the terms "Dashboard" and "Dealer Dashboard" and identify all individuals having relevant knowledge.

24. State whether Applicant considered the issue of, and/or received any opinions concerning, a likelihood of confusion between Applicant's Mark and Opposer's use of the terms "Dashboard" and "Dealer Dashboard."

25. Identify each person from whom Applicant has obtained a statement and/or whom Applicant plans to use as a witness in this proceeding.

26. Identify each person who supplied information used in the preparation of the answers to these interrogatories and, if more than one such person was involved, indicate the specific interrogatories to which each such person contributed all or part of the information comprising the answer.

27. For each expert Applicant has retained to give testimony in this proceeding, provide the information required in Rule 26(a)(2)(B) of the Federal Rules of Civil Procedure.

Dated: November 21, 2006

WILMER CUTLER PICKERING
HALE and DORR LLP

By: ____________________
Dyan Finguerra-DuCharme
399 Park Avenue
New York, NY 10022
(212) 937-7203

Mark G. Matuschak
60 State Street
Boston, Massachusetts 02109
(617) 526-6000

Cora Tung Han
1875 Pennsylvania Ave., NW
Washington, DC 20006
(202) 663-6000

Attorneys for Opposer
Honda Motor Co., Ltd.

CERTIFICATE OF SERVICE

I hereby certify that a true and complete copy of the foregoing Opposer's First Set of Interrogatories has been served on November 21, 2006 by Facsimile and First Class Mail to:

Michael Dalton
Box 18137
670 Northland Blvd.
Cincinnati, OH 45218-0137

Doris L. McPherson

Doris L. McPherson

Affidavit of Michael Dalton
In Response
To
Opposer's First Set of Interrogatories

I, Michael Dalton, being duly sworn and cautioned state as follows:

As to:

1.) Applicant is involved in consulting, sales, services, training, financing, merchandising and VAR for various firms in the retail, wholesale, sector and owns and operates a website DealerDashboard.com aimed toward the automotive consumer, automotive trade industry, independent dealer and manufacture franchise dealer.

2.) Michael Dalton, beginning unknown to current.

   Thomas-Michael Agency aprox; 1/90 to current.

   DealerDashboard.com aprox; 10/99 to current.

   PO Box 18137, Cincinnati, Ohio 45218-0137

3.) Applicant has no employees.

4.) Advisory, Consulting, training, website services which are tailored to each specific customer. A DealerDashboard Dealer to Dealer (D2D) online auction which includes services for dealers to monitor the return on investment (ROI), cost of goods sold concerning their sales, service and parts department investment in per. unit vehicle sold or inventoried (http://dealerdashboard.com/auctioninfo.html). Floor plan, retail, wholesale, financing and services for automotive dealers to identify their inventory financed and the cost of goods financed via. individualized web enabled tracking system acting as agent for lenders (currently (DSC) Dealer Services Corp). (http://dealerdashboard.com/dsc.html). Applicant provides a web site (http://DealerDashboard.com) for consumers and trade to shop for all things automotive via. reciprocal links, affiliate links, and URL opt-in posting. Additionally, applicant provides co-branded email services (http://dealerdashboard.mail.everyone.net/email/scripts/loginuser.pl), co-branded auto shopping (http://www.autoworld.com/partner.asp?p=dealerdashboard) and co-branded target marketing services (http://findmorebuyers.com/page.cfm/3?4187) as agent or affiliate marketer.

5.) 10/05/1999

6.) Domain name, web site portal, dealer services and financing, consulting, training, Dealer to Dealer online auction, management services and providing automotive dealerships managerial information concerning their sales, service, and parts department key financial indicators of how their dealership is performing and providing a web site featuring information about automotive dealerships, automobiles, automotive parts and accessories, at which users can link to the retail or wholesale sites of others.

7.) Michael Dalton

8.) The Internet was in its infancy. The applicant was involved in ground floor automotive Internet development. The applicant wanted to provide a one-stop shop for dealers and consumers to engage and become the top of mind point for dealers to gain the knowledge and tools to manage their dealerships profitably. The applicant conceptualized an automotive dashboard with the gages and tools to make informed decisions. The applicant also conceptualized that the target customer was the automotive dealer and the consumer factor was additional revenue potential as consumers could go to the same site and get access to participating dealers. Thus, the name DealerDashboard. The applicant wishes to note that opposers claim that dashboard is generic in nature: Was not the case when applicant selected the term DealerDashboard and further states that DealerDashboard may have been a contributing factor for, not as a result of, any alleged evolution in the term dashboard.

9.) Through web search, AOL, yahoo, info seek, etc. and applicant doesn't recall that goggle was born, as yet. Applicant searched the US Federal trademark site, and State of Ohio attorney generals site. Applicant also searched the international domain register and purchased every top-level domain, at that time, of the brand DealerDashboard.

10.) None, but reserves the right to amend as necessary through the course of discovery.

11.) Top-of mind, one stop shop location for the tools and gauges to effiently conduct the profitable relationship between dealers, their operations and their communication with the consumer.

12.) Worldwide, but, mostly USA via. Website content, personal visits, direct mail and telemarketing.

13.) All automotive independent and manufacture licensed automotive dealers and the retail consumers.

14.) DealerDashboard.com, net, info, biz, .uk, org, all available search engines, AOL, yahoo, goggle, msn, Lycos direct mailers, personal logo branded apparel, business cards.

15.) All major search engines goggle, AOL, yahoo, msn, Lycos.

16.) (a) http://DealerDashboard.com

(b)http://search.aol.com/aol/search?invocationType=comsearch30&query=DealerDashboard&do=Search

(c)http://search.aol.com/aol/search?query=Dealer+Dashboard&invocationType=spelling

(d)http://www.google.com/search?q=dealerdashboard&rls=com.microsoft:en-us:IE-SearchBox&ie=UTF-8&oe=UTF-8&sourceid=ie7

(e)http://www.google.com/search?hl=en&rls=com.microsoft:en-us:IE-SearchBox&sa=X&oi=spell&resnum=0&ct=result&cd=1&q=dealer+dashboard&spell=1

(f)http://search.msn.com/results.aspx?q=dealerdashboard&src=IE-SearchBox

(g)http://search.msn.com/results.aspx?q=dealer+dashboard&go=&form=QBRE

(h)http://search.lycos.com/index.php?src=ie&query=dealerdashboard

(i)http://search.lycos.com/?src=ie&query=dealer+dashboard&x=59&y=12

(j)http://search.yahoo.com/search?p=dealerdashboard&ei=utf-8&fr=b2ie7

(k)http://search.yahoo.com/search;_ylt=A0geu97E6.tHChEAwXZXNyoA?p=dealer+dashboard&y=Search&fr=b2ie7&ei=UTF-8

(l)Embroidered logo branded apparel

(m)Direct mail pieces.

(n)Business Cards

(o)Applications for floorplan finance.

http://dealerdashboard.com/DSCapplicationplusInstruc.pdf

(p)Wayback archive portal

http://web.archive.org/web/*/http://dealerdashboard.com

(17.) Spent approximately $500.00 in prize giveaways labeled DealerDashboard.com to a Corvette club in Michigan early in 1999 or 2000 for their annual car show. Records were disposed of, but will submit should they become available.

(18.) DealerDashboard has no direct customers but currently serves approximately 5 dealers, which were sold under the dealerdashboard brand as agent for Dealer Services Corporation. Applicant has no estimate of future customer potential or gross revenue estimates. Applicant states that the dealerdashboard brand is promoted 24 hrs. per day 365 days per year via. the website DealerDashboard.com and receives weekly inquiries regarding services offered which may or may not lead to a continuing customer. Many customers are rejected due to credit difficulties.

(19.) $200.00 estimate.

(20.) None, but reserves the right to amend as necessary through the course of discovery.

(21.) Michael Dalton

(22.) Web search, by applicant, in May 2006 revealed a non-secure site listing in search engines under the term dealerdashboard during normal business involving periodic defense of trademark brand operated by opposer.

(http://www.in.honda.com/RRAADCTM/Content/AAD/AD85/DashboardiNadmin.htm). The opposer was marketing a product utilizing the term dealer dashboard, which created initial interest confusion. The opposer was marketing a product titled dealer dashboard in a manner that Honda dealers would associate the brand dealer dashboard with Honda the manufacture and not the founder and applicant; thus, resulting in delusion of the applicants brand. Upon applicants cease and desist demand the opposer ceased using dealer dashboard and instead used the term Dealer Principal and GM - Dashboard Application. This conversion resulted in the continuation of initial interest confusion as Meta spiders continued to list opposers site within the top ten search listings, on the search term dealerdashboard, due to the Meta spider craw of Dealer and Dashboard. Applicant, Michael Dalton, then advised Honda to cease and desist the continued initial interest confusion. Honda currently does not appear in search engines under the term dealerdashboard or dealer dashboard. Applicant is currently unaware if Honda is currently promoting the brand dealerdashboard or dealer dashboard internally through secure methods to circumvent applicants brand.

(23.) A Web search, by applicant, in May 2006 revealed a non-secure site listing in search engines under the term dealerdashboard during normal business involving periodic defense of trademark and brand. The opposer was marketing a product utilizing the term dealer dashboard, which created initial interest confusion. The opposer was marketing a product titled dealer dashboard in a manner that Honda dealers would associate the brand dealer dashboard with Honda the manufacture and not the founder and applicant thus resulting in delusion of the applicants brand. Upon applicants cease and desist demand the opposer ceased using dealer dashboard and instead used the term Dealer Principal and

GM - Dashboard Application. This conversion resulted in the continuation of initial interest confusion as Meta spiders continued to list the site within the top ten search listings due to the Meta spider craw of Dealer and Dashboard. Applicant then advised Honda to cease and desist the continued initial interest confusion. Honda currently does not appear in search engines under the term dealerdashboard or dealer dashboard. Applicant is currently unaware if Honda is currently promoting the brand dealerdashboard or dealer dashboard internally through secure methods to circumvent applicants brand.

(24.) Yes, applicant considered the issue of initial interest confusion and made a cease and desist demand on opposer. A Web search, by applicant, in May 2006 revealed a non-secure site listing in search engines under the term dealerdashboard during normal business involving periodic defense of trademark and brand (http://www.in.honda.com/RRAADCTM/Content/AAD/AD85/DashboardiNadmin.htmhttp://trade) operated by opposer.

The opposer was marketing a product utilizing the term dealer dashboard, which created initial interest confusion. The opposer was marketing a product titled dealer dashboard in a manner that Honda dealers would associate the brand dealer dashboard with Honda the manufacture and not the founder and applicant; thus, resulting in delusion of the applicants brand. Upon applicants cease and desist demand the opposer ceased using dealer dashboard and instead used the term Dealer Principal and GM - Dashboard Application. This conversion resulted in the continuation of initial interest confusion as Meta spiders continued to list opposers site within the top ten search listings due to the Meta spider craw of Dealer and Dashboard. Applicant then advised Honda to cease and desist the continued initial interest confusion. Honda currently does not appear in search engines under the term dealerdashboard or dealer dashboard. Applicant is currently unaware if Honda is currently promoting the brand dealerdashboard or dealer dashboard internally through secure methods to circumvent applicants brand.

(25) Michael Dalton

(26) Michael Dalton

(27.) None, but reserves the right to amend as necessary through the course of discovery.

Further sayeth naught:

Michael Dalton

Sworn before me this 28th day of March, 2008

Before Eileen E Pine Notary Public

EILEEN E. PINE, Notary Public
In and for the State of Ohio
My Commission Expires Nov. 15, 2011

Certificate of Service

I, Michael Dalton certify that I have submitted his response to opposer's First Set of Interrogatories via. electronic email upon attorneys for opposer, Mark Matuschak at mark.matuschak@wilmerhale.com, and Cora Han at cora.han@wilmerhale.com this 28th day of March 2008.

/ Michael Dalton /
Electronically Signed

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 78/339,571
Published: May 30, 2006 at TM 674
Mark: DEALERDASHBOARD

HONDA MOTOR CO., LTD., Opposer, v. MICHAEL DALTON, Applicant	)	Opposition No. 91173105

OPPOSER'S FIRST SET OF REQUESTS FOR ADMISSIONS TO APPLICANT

Pursuant to Rule 36 of the Federal Rules of Civil Procedure and Rule 2.120 of the Trademark Rules of Practice, Honda Motor Co., Ltd. ("Opposer") serves its First Set of Requests for Admissions to Michael Dalton ("Applicant").

DEFINITIONS AND INSTRUCTIONS

1. Honda incorporates by reference the definitions and instructions set forth in Opposer's First Set of Interrogatories to Applicant.

REQUESTS

Request No. 1

Each document Applicant has produced in response to Opposer's First Set of Requests for the Production of Documents and Things is authentic for purposes of admission into evidence during the testimony period in this proceeding.

Dated: November 21, 2006

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Certificate of Service

I hereby certify that a true and complete copy of the foregoing Opposer's First Set of Requests for Admissions to Applicant has been served on November 21, 2006 by First Class Mail to:

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Doris L. McPherson

Doris L. McPherson

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 78/339,571
Published: May 30, 2006 at TM 674
Mark: DEALERDASHBOARD

HONDA MOTOR CO., LTD.,	)	Opposition No. 91/173,105
	)	
Opposer,	)	
	)	NOTICE OF RELIANCE
v.	)	
	)	
MICHAEL DALTON,	)	
	)	
Applicant	)	
	)	

TAB C

FOCUS - 1 of 2 DOCUMENTS

Automation in Construction

(2004) 13 EACONS 1 53-65

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LENGTH: 7105 words

TITLE: Capitalizing on early project decision-making opportunities to improve facility design, construction, and life-cycle performance--POP, PM4D, and decision dashboard approaches

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BODY:

ABSTRACT

In this paper, we assess the requirements of architecture, engineering, construction (AEC) decision making and explain the limitations of state-of-the-art practice and theory in supporting informative formulation, clear and flexible evaluation, and quick re-formulation of AEC alternatives. We introduce the concept of Virtual Design and Construction (VDC) through results from several case studies that utilized Product, Organization, and Process (POP) Modeling and the Product Model and the Fourth Dimensional (PM4D) approaches in supporting design, construction, and life-cycle performance decisions. While VDC applications contribute to more accurate, informative, and efficient formulation of AEC alternatives, we discuss the needs for research on a Decision Dashboard to formally represent, organize, and decouple various decision contents (i.e., options, alternatives, predictions, and criteria) to support better evaluation and re-formulation of AEC alternatives.

FULL TEXT

1 Introduction

In the field of architecture, engineering, and construction (AEC), professional consultants guide their clients in making decisions that have both strategic and tactical implications for the quality, cost, duration, and resource allocation of a project alternative. Once a decision need or a challenge arises, AEC consultants apply their professional skills to formulate different option plans. They predict and evaluate the performance of such option plans. Based on their client's decision criteria such as budget, risk attitude, specifications, and milestones, the consultants combine option plans to formulate and recommend project alternatives to their clients for selection. Such decision-making scenarios take place in many phases of a design and construction project. In pre-project planning, developers compare financial prospects of different property sites for investment decisions; in schematic design, building owners compare aesthetics, cost, and the life-cycle performance of different design proposals for development decisions; whereas in construction engineering and management, the developers and their contractors compare different acceleration proposals to mitigate unforeseen delays during construction.

At the Center for Integrated Facility Engineering (CIFE) in Stanford University, we follow a research approach that strives to balance practical and theoretical advancements. One of CIFE's missions is to promote and extend the use of VDC technologies to support the visualization, analysis, and evaluation of the multidisciplinary performance of facility projects in support of AEC decisions [1]. This paper captures our collaboration experience with various industry partners on the following projects:

- design, construction, and life-cycle analyses of a university auditorium project, with a capacity of 600 seats and a construction cost of about $5US million,
- design coordination and construction of a biotechnology laboratory project, with an area of over 25,500 m^2 and a design and construction budget of over $130US million,
- acceleration proposals for a retail complex project during construction, with a construction budget of over $72US million,
- pre-construction planning on a museum project, with an estimated $300US million design and construction cost, and
- pre-construction planning on a hospital project, on a 55,000 m^2 site.

Based on our observations and industry involvement in these cases, we explain why current practice does not support informative formulation--one of three requirements--of decision alternatives. We then present Product, Organization, and Process (POP) modeling as well as the Product Model and the 4th Dimension (PM4D) as examples of VDC approaches and discuss their benefits on the design, construction, and life-cycle performance of the aforementioned industry cases. In spite of the visual and analytical benefits of VDC technologies, we then illustrate the need to support the evaluation and re-formulation of AEC alternatives with formal handling of various decision contents. We motivate the need of our ongoing research, which focuses on the representation and organization of heterogeneous decision contents to support a more informative, flexible, and repeatable selection of AEC alternatives.

2 AEC decision making

Decision is an irrevocable allocation of resources [2]. Information, preference, and choice are the three parts of "Decision Basis", which synthesizes the decision problem and allows for logical evaluation, analysis, and appraisal of the recommended decision alternatives [3]. Theory in AEC decision making establishes requirements that align with the decision basis. Value engineering theories [4,5], set-based design [6], the "Level of Influence" concept [7], and industrial case studies [8] rationalize the benefits of gathering an extensive and balanced information basis, setting up public and explicit criteria, and generating multiple alternatives in early project phases. In summary, coming up with a good decision in AEC requires informative formulation, clear evaluation, and quick re-formulation.

2.1 Informative formulation

The quality of decision making depends on its information basis. Parameters such as performance level, cost, activity duration, and resource needs may separately or collectively influence the selection of AEC alternatives. Therefore, the more extensive and balanced the inputs of information (i.e., options, alternatives, predictions, and criteria, which we call collectively decision contents), the more informed the decision basis becomes.

Prior to the employment of VDC tools on some of our case studies, we observed that practitioners lack the resources to effectively generate and communicate decision factors. In the biotechnology project, the Director of Research suddenly came up with an idea of swapping the laboratory spaces with the office spaces late during the design process. The architects and owner representatives foresaw potential ripple consequences that this decision would have for other consultants and their work in place. In spite of the verbal explanations and the skepticism expressed by the team, the Director did not find any solid compelling evidence against his strongly held idea of changing the spatial configuration. As Section 3.1.1 explains, VDC technologies allow non-AEC professionals to visually comprehend the physical product of the design while integrating components and systems from different specialty designers.

In the hospital project, construction planners communicated their construction sequencing plans with a binder of 60 color-labeled plans. Each color plan denoted a specific construction activity and referenced to another sheet of schedule information. This manual, custom, and hence non-repeatable, process required significant time commitment for planners to generate each alternative and for reviewers to comprehend the binder. In Section 3.1.2, we discuss how VDC technologies expedite this process by promoting a more repeatable modeling approach while promoting a more easily understandable means to review the construction sequences.

In the museum project, the pre-construction consultants were contemplating two structural systems--structural steel and reinforced concrete--to support the roof garden. The project director for the contractor intuitively understood the organizational advantages of self-performing the concrete roof system over subcontracting the structural steel work. However, the project director lacked evidence to support his argument. In Section 3.1.3, we explain how VDC technologies provide simulation results that assess the impact of different ways to organize the design and construction of projects on project performance.

In the university auditorium project, the clients were to decide upon two air-conditioning systems--mixed cooling versus displacement (or underground) cooling. Had the project team not conducted VDC analyses to study the life-cycle performance of mixed versus displacement cooling systems, the cost-sensitive decision makers would have probably selected the mixed system rather than the displacement cooling system. In Section 3.3, we detail the background, process, examples, and results of the VDC approach to illustrate how the approach contributed to the formulation of alternative proposals for the clients to make an informed decision early in the project.

In a nutshell, VDC technologies are valuable in automating and supporting informative formulation of AEC alternatives.

2.2 Clear and flexible evaluation

Given various options and alternatives, the evaluation is dependent on the means of providing decision makers with pertinent decision contents. An evaluation has to be clear such that all involved stakeholders can understand how the predicted performance of the alternatives fares against the decision criteria. An evaluation also has to be flexible such that the stakeholders can shift their decision foci (among macro- and micro-decision issues) and make necessary queries according to the issues at stake.

In the retail complex project, unforeseen soil contaminants had delayed the construction project critically for 2 months. The developers had to evaluate different acceleration alternatives and balance the conflicting interests of on-time turnover, low change order cost, and project risks. As with other aforementioned cases, we applied VDC technologies to simulate the integrated challenges of the physical product design, organization team dynamics, and process sequence of the project. In addition, we utilized the interactive workspace feature of VDC to support the description and evaluation of various project alternatives (see Section 3.2). However, in spite of these VDC approaches, Section 4 explains the limitation of existing theories and methods to provide clear and flexible evaluation decision supports. We explain the research needs and anticipated implications of developing a Decision Dashboard--a visual interactive tool for the synthesis of decision options, alternatives, predictions, and criteria.

2.3 Quick re-formulation

The time and the process it takes to re-formulate new alternatives determine the number of alternatives tested by the project stakeholders. We hypothesize that the quicker and the simpler the re-formulation process, the more alternatives the decision makers can create, and the better value the decision-making process generates.

Although the end-users of the aforementioned university auditorium project provided valuable functional inputs to the designers during a schematic review meeting that took place in an immersive virtual reality environment, the amount of model and data customization in preparation of similar interactive meetings limited the number of additional alternatives the project team could re-formulate in a timely manner [8]. Similarly in Section 4, we explain the difficulty to decouple alternatives to re-formulate them on examples from the aforementioned retail complex project. We also explain how our ongoing research in developing a Decision Dashboard may address this limitation.

3 Virtual design and construction

--to support the roof garden. The project director for the contractor intuitively understood the organizational advantages of self-performing the concrete roof system over subcontracting the structural steel work. However, the project director lacked evidence to support his argument. In Section 3.1.3, we explain how VDC technologies provide simulation results that assess the impact of different ways to organize the design and construction of projects on project performance.In the university auditorium project, the clients were to decide upon two air-conditioning systems--mixed cooling versus displacement (or underground) cooling. Had the project team not conducted VDC analyses to study the life-cycle performance of mixed versus displacement cooling systems, the cost-sensitive decision makers would have probably selected the mixed system rather than the displacement cooling system. In Section 3.3, we detail the background, process, examples, and results of the VDC approach to illustrate how the approach contributed to the formulation of alternative proposals for the clients to make an informed decision early in the project.In a nutshell, VDC technologies are valuable in automating and supporting informative formulation of AEC alternatives.2.2 Clear and flexible evaluationGiven various options and alternatives, the evaluation is dependent on the means of providing decision makers with pertinent decision contents. An evaluation has to be clear such that all involved stakeholders can understand how the predicted performance of the alternatives fares against the decision criteria. An evaluation also has to be flexible such that the stakeholders can shift their decision foci (among macro- and micro-decision issues) and make necessary queries according to the issues at stake.In the retail complex project, unforeseen soil contaminants had delayed the construction project critically for 2 months. The developers had to evaluate different acceleration alternatives and balance the conflicting interests of on-time turnover, low change order cost, and project risks. As with other aforementioned cases, we applied VDC technologies to simulate the integrated challenges of the physical product design, organization team dynamics, and process sequence of the project. In addition, we utilized the interactive workspace feature of VDC to support the description and evaluation of various project alternatives (see Section 3.2). However, in spite of these VDC approaches, Section 4 explains the limitation of existing theories and methods to provide clear and flexible evaluation decision supports. We explain the research needs and anticipated implications of developing a Decision Dashboard--a visual interactive tool for the synthesis of decision options, alternatives, predictions, and criteria.2.3 Quick re-formulationThe time and the process it takes to re-formulate new alternatives determine the number of alternatives tested by the project stakeholders. We hypothesize that the quicker and the simpler the re-formulation process, the more alternatives the decision makers can create, and the better value the decision-making process generates.Although the end-users of the aforementioned university auditorium project provided valuable functional inputs to the designers during a schematic review meeting that took place in an immersive virtual reality environment, the amount of model and data customization in preparation of similar interactive meetings limited the number of additional alternatives the project team could re-formulate in a timely manner [8]. Similarly in Section 4, we explain the difficulty to decouple alternatives to re-formulate them on examples from the aforementioned retail complex project. We also explain how our ongoing research in developing a Decision Dashboard may address this limitation.3 Virtual design and constructionOne of the major benefits of Virtual Design and Construction (VDC) simulation and modeling is the ability to quickly identify different options, quantitatively predict options' behaviors, evaluate the alternatives, and assess the project alternatives before committing to a major decision. The following sections explain the Product, Organization, and Process (POP) modeling approach; interactive workspace (iRoom), which is capable of cross-referencing POP models and information across different computers and displays; and the Product Model and the 4th Dimensional (PM4D) approach, which we developed and tested in an international pilot project.

3.1 POP modeling approach and implications on design and construction decisions

POP models complement 3D product models with process and organization models for a more comprehensive method for virtual design and construction. Based on our collaboration experience with industry partners, we conclude that the POP modeling approach supports better coordination, visualization, and planning than conventional practice. We explain these conclusions with examples in the following sections.

3.1.1 Product modeling

Product modeling tools such as Autodesk Architectural Desktop or Graphisoft ArchiCAD virtually model the physical components or features of a design (Fig. 1) and allow engineers to leverage the 3D object intelligence for tasks such as quantity takeoff and thermal analyses. At the same time, the explicit three-dimensional information of product models facilitates spatial coordination and construction planning among different AEC specialty professionals.

Fig. 1. Graphical view of a product model showing components of architectural walls, structural beams, mechanical ducts, electrical cable trays and conduits, and fire sprinklers (3D model built with Architectural Desktop Version 3.3).

Subsequent to the change requested by the Director of Research in the biotechnology case study, we collaborated with the project teams to construct a three-dimensional product model of the laboratory facility. During the modeling process, the team was able to identify several spatial conflicts between architectural, structural, and building systems components that had not been identified in the two-dimensional drawings. Furthermore, the product models provided the clients with a vivid representation of the complexity and value of prior architectural, structural, mechanical, electrical, and plumbing coordination in place. The models helped the project team members to explain the ripple effects of a seemingly minor spatial reconfiguration to the clients.

3.1.2 Product-process modeling

4D modeling is an example of product-process modeling, which integrates a 3D product model with a schedule. By animating a 3D product model based on the linkages to a construction schedule, a 4D model communicates the sequence of planned work visually and helps planners identify schedule conflicts, safety hazards, and acceleration opportunities.

In the hospital case, a student team spent approximately 10 person-hours to construct a high-level product model of the hospital components in 3D; 2 person-hours to develop a process model based on the sequencing information we gathered from the professionals; and 1 person-hour establishing the product-process linkages (Fig. 2). Instead of reading through a 60-page binder, reviewers could comprehend the construction schedule more quickly with the 4D model. Furthermore, the student team was able to leverage the product model and the process model for developing alternative sequence plans. Rather than manually generating a whole new binder for an alternative schedule, it took 2 additional person-hours to develop a schedule alternative with the VDC approach.

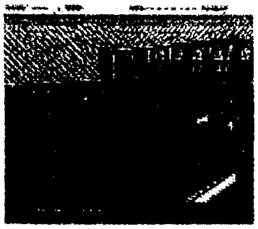

Fig. 2. Snapshot of a 4D model highlighting specific construction activities scheduled for a particular day in the construction sequence of the hospital project (4D model created with Common Point 4D).

3.1.3 Organization-process modeling

We use ePM SimVision to model and simulate the interaction among teams, organizations, and their associated responsibilities throughout different phases of a project. Such organization-process modeling allows users to predict coordination bottlenecks, team backlogs, and hidden work under different staffing and teaming plans.

For the museum project, a student team interviewed various project team members, gathered relevant information, and modeled the work processes along with the hierarchy and staffing of the project teams in ePM SimVision (Fig. 3). The simulation provided qualitative and quantitative evidence, such as schedule risk, position backlogs, and communication risk, with which the project director could assess the two design and construction alternatives.

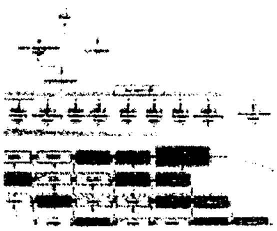

Fig. 3. A partial view of the SimVision organization-process model from the museum project.

3.2 The interactive workspace

Johanson et al. [9] define the Interactive Workspace (iRoom) as interfaces and an infrastructure that are characterized by heterogeneity, multiplicities, and dynamism among users, devices, and software applications. In collaboration with the Computer Science Department in Stanford University, CIFE has assembled an iRoom in its facility. The ongoing CIFE iRoom research aims at defining and evaluating new ways for project teams to interact with and visualize project information to facilitate fast and effective decision making in a group context [10]. On the aforementioned retail complex, museum, and hospital projects, we have tested with industry practitioners the real-time referencing capabilities that utilize common parameters such as dates and names to unify the focus of POP and related cost models (Fig. 4).

Fig. 4. A snapshot from the retail complex project in which the iRoom supported the cross-referencing of POP models and multidisciplinary views.

On the retail complex project, the iRoom infrastructure allowed us to evaluate different acceleration alternatives by touching on a particular milestone on the process-model displays which prompts, e.g., automatic responses by the adjacent product/process-model displays to show corresponding 4D views of schedule alternatives.

3.3 PM4D approach and implications on life-cycle performance

Collaborating with its Finnish partners, CIFE developed and tested the PM4D approach in the Helsinki University of Technology Auditorium-600 pilot project [8]. HUT-600 was the first live and large-scale industrial application of the Industry Foundation Classes (IFC) interoperability standard. We documented the life-cycle studies made during the early schematic design phase of HUT-600, explained how the PM4D approach supports the life-cycle studies, and analyze the anticipated implications of the PM4D approach and the life-cycle studies on the long-term performance of the capital facility [8]. Below, we summarize the insights from this project as they relate to the topic of this paper.

HUT-600 consultants noted, and conferred with the project construction managers, that in the total spending on a capital facility, 80% of the total cost is spent on the operation and maintenance, whereas the remaining 20% goes to planning, design, and construction. Hence, it is crucial to capitalize on early project opportunities to optimize the facility design for long-term performance.

The PM4D approach relies on product modeling and interoperability standard(s) to eliminate the inefficiency and risks of data re-entry in conventional practice. The approach aims at leveraging state-of-the-art analytical and visualization tools to optimize the design, construction, and operation of a proposed facility during early project phases. The approach recognizes the importance of having cross-disciplinary expertise to improve design and construction integration and performance. With the goal of improving the quality of design and construction services, the approach called for utilizing intelligent object-oriented product models and the IFC interoperability standard to support data sharing. Furthermore, the approach adopted various visualization tools and analysis tools for life-cycle performance studies for early-project decision making.

During the early schematic phase, the architects and mechanical engineers designed with object-oriented modeling software such as Graphisoft's ArchiCAD and Progman Oy's MagiCAD. The IFC release 1.5.1 interoperability standard reduced the needs to re-enter geometric data, thermal values, and material properties [8]. Efficient model and data sharing during the schematic design phase allowed the building-systems consultants to simulate various cooling and heating requirements based on the architectural product model. These thermal values were directly imported to the Heating, Ventilating, and Air-Conditioning (HVAC) design application, where the mechanical consultants laid out the distribution paths. The software then automatically sized and balanced the mechanical components. The object-oriented HVAC application then exported the geometry of ducts and air handling units for the architects to incorporate into the architectural model and generated a bill of materials for the general contractor.

Synthesizing the readily available bill of materials from the mechanical consultants and the three-dimensional geometry from the architects, the general contractor for HUT-600 utilized an automated cost estimating and value engineering system, again object-oriented and IFC-compliant, to match design components with the contractor's database for cost estimation, scheduling, and resource leveling.

Compared to a conventional approach, this relatively seamless data exchange and the related automated tools tremendously expedited design time and improved the quality of interdisciplinary collaboration [8]. As a result, the project team quickly generated three design and two building system alternatives and other work that directly added value to the clients' and users' ability to understand the project design and make necessary decisions in a timely and efficient manner.

Kam et al. also reported that in HUT-600 the use of object-oriented product models and the IFC interoperability standard resulted in about 50% time savings in design documentation for some disciplines, as a result of the object-oriented library, parametric properties, knowledge reuse, and data sharing. The PM4D approach expedited the

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traditional schematic design services while helping the engineering and construction professionals to develop more project alternatives to greater detail than is typically economically possible today. As a result, the project team shifted their attention from performing routine jobs to conducting life-cycle analyses. Such analyses added value to the project by reducing the risks of cost overrun or dissatisfaction of long-term performance.

By March 2001, only 3 months into the design phase, a rich set of analytical results were available to the owner and the project team members. Subsequently, the owner evaluated various project alternatives (e.g., architectural features, mixed versus displacement cooling systems, etc.) based on their functional performance, projected operating costs, maintenance costs, and environmental impacts and chose the designs and systems that best met their long-term strategic goals. In the selection of the air-conditioning system, the owners were confident to invest in the more energy efficient, environment-friendly, slightly more expensive, and better performance system--the displacement cooling system.

The HUT-600 project team also explored various visualization tools, such as virtual reality-EVE, 4D CAD, virtual animations, etc., to foster early and effective communication among the end-users, owner, and project team. In particular, the HUT-600's project team conducted a series of life-cycle analyses to evaluate the thermal performance, cost implications, and environmental impacts of project alternatives. In the following subsections, we explain how the project team evaluated two air-conditioning system alternatives--mixed cooling versus displacement cooling systems. In mixed cooling, the system supplies high velocity cold air from the ceiling. It is simpler in design and cheaper in cost when compared to a displacement cooling system, which slowly cools the space from the floor and displaces the warm air up to the exhaust in the ceiling.

3.3.1 Thermal performance

The mechanical engineers utilized Olof Granlund Oy's RIUSKA for thermal simulations and AEA Technology's CFX to conduct computational fluid dynamics (CFD) analyses. Since the auditorium space was a critical room with heat emission from 600 users and more than 200 light fixtures, RIUSKA's predictions and CFX's analyses enabled the engineers to quantitatively compare the profiles of temperature and air velocity stratification between the mixed and the displacement cooling schemes.

Based on 3D model input, RIUSKA accounts for the dynamic behavior of thermal masses in response to the changing exterior temperatures through an hourly increment over a 12-month period. Thus, engineers could combine different spaces and building systems to test various insulation and construction assembly options. Once the indoor air temperature target was specified, the program took a few minutes to analyze the thermal loads from the occupancy, the occupants' schedule, the equipment, and the exterior temperature conditions against the different insulation schemes, window transmittance, and louver systems.

Taking RIUSKA's analysis results as its target range and boundary conditions, CFX took about 10 h to iteratively solve for the finite numeric values of air temperature and supply air velocity across the sectional profiles of the auditorium space. The CFX results illustrated that in spite of a supply of lower air temperature of 17 °C, the mixed cooling system was not as efficient as the displacement cooling system (with required supply air temperature of 19 °C) in the occupants' zone--the area that matters most. Hence, the engineers learned from numerical values and vivid graphical profiles (Fig. 5) that the mixed system had to supply cooler air at higher velocity in order to balance the warmer air around the lighting fixtures in the ceiling level.

Fig. 5. CFX provided CFD cross-sectional profiles of air velocity, which scales from 0.02 m/s (blue) to 0.20 m/s (red), in the displacement cooling scenario (left) as well as the mixed cooling scenario (right), graphs courtesy of Olof Granlund.

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3.3.2 Life-cycle cost analysis

The HUT-600 project consultants employed Olof Granlund Oy's BSLCC software to project the operation and maintenance costs of project alternatives throughout the facility's expected life span. The consultants and the construction managers shared their respective knowledge from past projects, facility management data, and manufacturers' catalogues to estimate energy consumption costs, maintenance costs, and immediate investment costs (Fig. 6), which all together provided reliable quantitative decision supports for selecting the mechanical system, choosing electrical lighting and maintenance methods, and qualifying bid packages from air handling unit manufacturers.

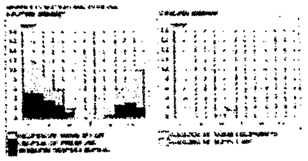

Fig. 6. RIUSKA projected the annual heating and cooling energy consumption for HUT-600 (graphs courtesy of Olof Granlund).

In the mixed versus displacement cooling analysis, HUT-600 consultants assumed the systems had a 50-year service life span. For both alternatives, BSLCC read the automatically generated bill of materials from the object-oriented applications, estimated the cost of initial investment, and projected operations costs based on energy consumption and system efficiency. With the analysis tool, the consultants also accounted for the maintenance cost, replacement cost, financing cost, as well as inflation cost. The in-depth comparison results informed the decision makers that the equivalent annual cost of the displacement air-conditioning system was 6% higher than that of the mixed air-conditioning system.

3.3.3 Environmental impact analysis

With Olof Granlund Oy's BSLCA software, the building system consultants conducted environmental impact assessments to evaluate the environmental influence of the building materials and the estimated energy consumed by the facility. In particular, the consultants extracted the material properties and quantity information from the product models of the alternative designs. They deduced the level of environmental impacts to air and water and subsequently, they quantified the amount of pollution emission, global warming, acidification, etc., in support of material and system comparison (Fig. 7).

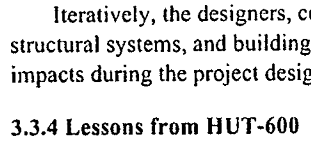

Fig. 7. Chart from an environmental impact analysis showing the weight of emission (units in y-axis brackets) from energy consumption (blue) and the building materials (green) over a 50-year period in HUT-600 (chart courtesy of Olof Granlund).

Iteratively, the designers, consultants, and construction managers evaluated and counter-proposed materials, structural systems, and building systems among themselves to balance aesthetics, performance, cost, and environmental impacts during the project design phase.

3.3.4 Lessons from HUT-600

Shared among the owners and the project team of HUT-600 was a committed belief in capitalizing on early project

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opportunities to make a lasting and positive effect on the facility over its total life span. Leveraging the reduced design time and improved data exchange that were enabled by the PM4D approach, HUT-600's project team was able to complete a series of life-cycle studies within the original design schedule. Pertinent decision factors and project alternatives were available during the early schematic design phase when making a decision had a relatively high impact and low cost.

In a nutshell, modern technologies are capable of expediting conventional design practices and promoting life-cycle approaches. Project experiences from the HUT-600 construction pilot demonstrated that owners are empowered to choose among comprehensive life-cycle alternatives and to align the long-term facility values with their strategic plans, whereas project team members can differentiate themselves from their competitors with higher efficiency, better quality, and more effective application of their expertise.

4 Barriers to better AEC decision making

Based on our application experience with the industry test cases, we assess that VDC technologies are promoting and automating the informative formulation of AEC decision alternatives. However, as we illustrate in the following case studies taken from the retail complex project, the high-level, predetermined, and static evaluation means and theories are hindering the clear and flexible evaluation of AEC alternatives; whereas the coupling of options and the discarding of seemingly invalid options adversely impact the quick re-formulation of AEC decision alternatives.

4.1 Evaluation barriers

For evaluating the conformity of each alternative with respect to the criteria (i.e., the owner's budget and milestones), the project executive in the retail complex project utilized spreadsheets and slide presentations to represent a predetermined set of performance predictions (Fig. 8). As the project developers evaluated the performance predictions against the decision criteria, they realized that they needed to compromise their turnover requirement to alleviate the budget problems with the acceleration alternative. Please note that this example is realistic, yet fictitious, i.e., it is based on our observations of the decision-making process and use of VDC technologies, but did not happen in exactly this way.

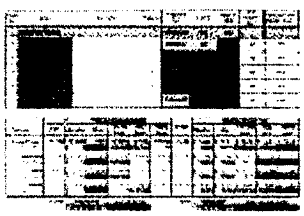

Fig. 8. Current SimVision "executive dashboard" (top) and spreadsheet-based evaluation (bottom) treat each alternative as a new field/case. They neither show the interdependencies among the alternatives nor allow the decision makers to query or evaluate alternatives at the options level.

In Section 2.2, we explained that the quality of evaluation is dependent on the means and methods to provide decision makers with pertinent decision contents and that the means and methods have to be clear and flexible. In the retail complex project, the evaluation was predetermined, static, and limited to a high-level comparison of alternatives. The predetermined table of evaluation treats all alternatives equally as independent choices; it does not differentiate whether the choices can be taken together or are truly independent. It does not show the immediate and ripple effects of a particular option on other options. The comparison is inflexible to shift among different decision foci (e.g., from the overall steel acceleration performance predictions to the predictions of the retail steelwork). It restricts the evaluators from querying the performance predictions of individual options (e.g., the time and cost impact of using one versus two or three welding teams). Furthermore, it is passive and requires manual efforts to generate and update.

4.2 Re-formulation barriers

Similarly, as the decision makers came to a trade-off conclusion, they relaxed their turnover requirement for some of the buildings. With this new refinement of the decision criteria, numerous pre-coupled options had to be reconsidered. In particular, the decision makers wondered what would be the resulting schedule, cost, and risk impacts of changing one process option by adjusting the construction sequence between the lower parking structure and the retail steel from finish-to-start to a parallel execution. While one could describe the pre-coupled acceleration schedule rather easily with state-of-the-art POP models in the CIFE iRoom, the meeting participants could not test individual project options (e.g., whether to go overtime or not for steel erection, use a finish-start or parallel sequence, etc.) and thereby obtain the ripple responses of these isolated changes on their cross-disciplinary performance predictions such as cost or schedule impacts. Even a minor change or testing of an isolated option's effectiveness requires a new set of product, process, organization, and cost linkages--a lengthy and intensive procedure that hinders "what-if" analyses.

The meeting participants wanted to test "what-if" scenarios with individual options in new combinations and evaluate the predicted performance as well as the interdisciplinary consequences. Since it would take a considerable amount of time to change the pre-coupled models with various VDC tools, the decision facilitators could only intuitively discuss the merits of each option verbally, dismiss the meeting, regenerate the VDC product/process/organization/cost models, and then cross-link them all over again before quantitatively assessing the performance predictions with the decision makers.

As Section 2.3 discusses, quick and direct re-formulation of project alternatives is pivotal to the generation of multiple and creative alternatives. The coupling mechanism and the abandonment of invalid options may seem appropriate when decision facilitators formulate alternatives. The retail complex case study shows that criteria change with new states of information, the presence of a decoupled set of options--both valid and seemingly invalid ones--might be useful to support "what-if" analysis. Current POP modeling and simulation tools require some time (a few hours or a few days depending on the size and complexity of the POP models needed for a particular decision) and resources (a few applications) to isolate particular project options and re-formulate a new alternative using various VDC tools in the iRoom during "what-if" analyses.

4.3 Decision contents and challenges

Coming up with a good action plan in AEC requires informative formulation, clear evaluation, and quick re-formulation. In current practice, there are no formal means of representing the different types of decision contents (which include options, alternatives, predictions, and criteria), which are relevant but are dispersed among the multidisciplinary stakeholders. Decision contents are the information basis for AEC decision making. The complexity and variety of dispersed decision contents, along with the dynamic decision-making process as well as the many stakeholders, present challenges for achieving the decision-making objectives that are described in the previous section. We distinguish four types of content that go into the multidisciplinary and iterative decision making process. These content types are project options, project alternatives, performance predictions, and decision criteria.

4.3.1 Options (product, process, organization, and resource options)

Project options are intradisciplinary interventions. They are heterogeneous because they may include product options (e.g., a three-level or a five-level parking structure), process options (e.g., finish-to-start relationship or a start-to-start concurrent relationship; an 8-h work day or an 11-h overtime work day), organization options (e.g., employing one, two, or three welding teams), and resource options (e.g., using one set of formwork or two sets of formwork).

4.3.2 Alternatives

An assembly of intradisciplinary options yields a project alternative, which is a coherent project plan that addresses interdisciplinary factors. Examples of project alternatives include a concrete acceleration alternative, a structural steel acceleration alternative, and a hybrid acceleration alternative. Each of these alternatives specifies a unique combination of options.

4.3.3 Predictions

Modeling, simulating, and estimating the behaviors of a coherent project plan allow decision makers to assess the performance of a project alternative with both quantitative (e.g., cost estimate and schedule) and qualitative predictions (e.g., risk concerns).

4.3.4 Criteria

The quantitative and qualitative predictions in turn allow the decision makers to evaluate the anticipated performance of an alternative against the explicitly predefined purpose, priorities, preferences, and goals that are part of the decision criteria (e.g., specifications, milestone, and budget).

The handling of decision contents relies on the ad hoc and implicit knowledge of the professionals and thus undermines the information basis, evaluation clarity and flexibility, as well as the quickness of re-formulating new alternatives. State-of-the-art VDC technologies describe each alternative as a set of pre-coupled options by interlinking information views from different disciplines. While this linkage has the potential to contribute to a balanced representation, and thus comprehension, of a particular project alternative during the decision-making process, the inability to decouple pre-coupled options hinders the effectiveness of formulating, evaluating, and re-formulating project options and alternatives to address the changing scope, cost, schedule, and organizational needs or opportunities.

Current theory offers a qualitative framework and concepts that foster value-adding decision making. The realization of its benefits depends on the stakeholders involved, the processes undertaken, and the means to handle complex and heterogeneous decision contents. AEC information-processing theories do not support the integrated representation of product-organization-process-resource options and their inter-relationships, nor do they explicitly differentiate the characteristics of options, alternatives, predictions, and criteria for decision support. For instance, theories about value engineering [4,5,11] as well as time/cost tradeoff methodologies [12-14] deal with specific option types and neglect the multidisciplinary relationships or ripple effects among AEC options. On the other hand, the Critical Path Method [14] considers options on an isolated basis as it centers on the management of risks and uncertainty of a specific project alternative. Hence, current theory is lacking a formal means to support the synthesis (i.e., the representation, differentiation, organization, preservation, and manipulation) and evaluation of decision contents (i.e., valid and seemingly invalid options, alternatives, qualitative and quantitative predictions, and criteria) in an integrated reference model throughout the many phases of AEC decision making.

Hence, the challenge is to keep the stakeholders (particularly the decision makers) informed of all the contents (particularly the options and the decision criteria) during all phases of the decision-making process (particularly the briefing and analysis phases). There are strong needs for an integration of contents that is resourceful and transparent, such that the stakeholders can comprehend the issues at stake with good information breadth; evaluating the alternatives with clarity, focus, and flexibility; while re-formulating new alternatives with quickness and repeatability.

4.4 The decision dashboard approach

Building on POP models, we are developing a Decision Dashboard that is both a synthesizer and a visual interface with the decision contents. The Decision Dashboard is not a tool for automatic generation or coupling of project options, but a visual and interactive tool for the synthesis of ideas, predictions, and requirements among AEC stakeholders. To carry out the synthesis function, we are developing a schema and a new relationship set for the Decision Dashboard to handle heterogeneous decision contents, which are represented by Decision Objects and Functional Requirements Objects. Based on the attributes within and the relationships across these representation agents, the Decision Dashboard constructs a Decision Network, an interactive graphical network.

We anticipate that the Decision Dashboard will reduce the need to couple options or discard seemingly invalid decision contents; foster better decision foci through clear and flexible evaluation; and enable efficient manipulation of various decision contents on capital projects.

5 Conclusions

In conclusion, the decision basis in AEC requires informative formulation, clear evaluation, and quick re-formulation of alternatives. We illustrate the benefits of VDC technologies in support of informative formulation through explanation of POP modeling, the iRoom infrastructure, and the PM4D approach. Assessing the limitations of current theories and tools to support clear evaluation and quick re-formulation of alternatives, we motivate the research needs of a Decision Dashboard, which synthesizes heterogeneous decision contents (i.e., options, alternatives, predictions, and criteria) to support the formulation, evaluation, and re-formulation of AEC alternatives.

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These content types are project options, project alternatives, performance predictions, and decision criteria.4.3.1 Options (product, process, organization, and resource options)Project options are intradisciplinary interventions. They are heterogeneous because they may include product options (e.g., a three-level or a five-level parking structure), process options (e.g., finish-to-start relationship or a start-to-start concurrent relationship; an 8-h work day or an 11-h overtime work day), organization options (e.g., employing one, two, or three welding teams), and resource options (e.g., using one set of formwork or two sets of formwork).4.3.2 AlternativesAn assembly of intradisciplinary options yields a project alternative, which is a coherent project plan that addresses interdisciplinary factors. Examples of project alternatives include a concrete acceleration alternative, a structural steel acceleration alternative, and a hybrid acceleration alternative. Each of these alternatives specifies a unique combination of options.4.3.3 PredictionsModeling, simulating, and estimating the behaviors of a coherent project plan allow decision makers to assess the performance of a project alternative with both quantitative (e.g., cost estimate and schedule) and qualitative predictions (e.g., risk concerns).4.3.4 CriteriaThe quantitative and qualitative predictions in turn allow the decision makers to evaluate the anticipated performance of an alternative against the explicitly predefined purpose, priorities, preferences, and goals that are part of the decision criteria (e.g., specifications, milestone, and budget).The handling of decision contents relies on the ad hoc and implicit knowledge of the professionals and thus undermines the information basis, evaluation clarity and flexibility, as well as the quickness of re-formulating new alternatives. State-of-the-art VDC technologies describe each alternative as a set of pre-coupled options by interlinking information views from different disciplines. While this linkage has the potential to contribute to a balanced representation, and thus comprehension, of a particular project alternative during the decision-making process, the inability to decouple pre-coupled options hinders the effectiveness of formulating, evaluating, and re-formulating project options and alternatives to address the changing scope, cost, schedule, and organizational needs or opportunities.Current theory offers a qualitative framework and concepts that foster value-adding decision making. The realization of its benefits depends on the stakeholders involved, the processes undertaken, and the means to handle complex and heterogeneous decision contents. AEC information-processing theories do not support the integrated representation of product-organization-process-resource options and their inter-relationships, nor do they explicitly differentiate the characteristics of options, alternatives, predictions, and criteria for decision support. For instance, theories about value engineering [4,5,11] as well as time/cost tradeoff methodologies [12-14] deal with specific option types and neglect the multidisciplinary relationships or ripple effects among AEC options. On the other hand, the Critical Path Method [14] considers options on an isolated basis as it centers on the management of risks and uncertainty of a specific project alternative. Hence, current theory is lacking a formal means to support the synthesis (i.e., the representation, differentiation, organization, preservation, and manipulation) and evaluation of decision contents (i.e., valid and seemingly invalid options, alternatives, qualitative and quantitative predictions, and criteria) in an integrated reference model throughout the many phases of AEC decision making.Hence, the challenge is to keep the stakeholders (particularly the decision makers) informed of all the contents (particularly the options and the decision criteria) during all phases of the decision-making process (particularly the briefing and analysis phases). 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Based on the attributes within and the relationships across these representation agents, the Decision Dashboard constructs a Decision Network, an interactive graphical network.We anticipate that the Decision Dashboard will reduce the need to couple options or discard seemingly invalid decision contents; foster better decision foci through clear and flexible evaluation; and enable efficient manipulation of various decision contents on capital projects.5 ConclusionsIn conclusion, the decision basis in AEC requires informative formulation, clear evaluation, and quick re-formulation of alternatives. We illustrate the benefits of VDC technologies in support of informative formulation through explanation of POP modeling, the iRoom infrastructure, and the PM4D approach. Assessing the limitations of current theories and tools to support clear evaluation and quick re-formulation of alternatives, we motivate the research needs of a Decision Dashboard, which synthesizes heterogeneous decision contents (i.e., options, alternatives, predictions, and criteria) to support the formulation, evaluation, and re-formulation of AEC alternatives.AcknowledgementsWe thank the following people and their associates for their invaluable help in sponsoring the work reported in this paper, providing access to projects and VDC technologies and methods, and supporting VDC modeling and analysis of the projects: Ari Ahonen, Peter Allen, Jim Bedrick, Phil Bernstein, John Chachare, Reijo Hänninen, Curtis Johnson, Auli Karjalainen, Arto Kiviniemi, John Kunz, Jarmo Laitinen, Seppo Lehto, Wendy Li, Mark Liew, Kathleen Liston, Tom McKinley, Charlie Kuffner, Al Moulton, Xiaoshan Pan, Jes Pederson, Dean Reed, Melody Spradlin, John Taylor and Emre Terazi. 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HEADLINE: Seeing is believing: Designing visualizations for managing risk and compliance

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BODY:

ABSTRACT

This paper explores the design of visualizations that support mandated organizational compliance processes. We draw on the research literature to show how visualizations can operate as effective user interfaces for complex, distributed processes. We argue that visualizations can reduce the complexity of such processes, making them easier to manage, and can facilitate the communication and collaboration that are critical to supporting compliance. We describe the design and pilot deployment of a visualization that supports the IBM Sarbanes-Oxley Act compliance process, discussing design alternatives, the final design, its deployment, and lessons learned. [PUBLICATION ABSTRACT]

FULL TEXT

This paper explores the design of visualizations that support mandated organizational compliance processes. We draw on the research literature to show how visualizations can operate as effective user interfaces for complex, distributed processes. We argue that visualizations can reduce the complexity of such processes, making them easier to manage, and can facilitate the communication and collaboration that are critical to supporting compliance. We describe the design and pilot deployment of a visualization that supports the IBM Sarbanes-Oxley Act compliance process, discussing design alternatives, the final design, its deployment, and lessons learned.

INTRODUCTION

Since the advent of the Sarbanes-Oxley Act (SOX), which established new or enhanced standards for corporate accountability, systems for tracking and managing compliance testing have become critically important to organizations. One of the challenges to designing such systems is managing the interface between people and the system's computational processes. By their very nature, compliance systems require that humans monitor processes and investigate and fix problems: There is no such thing as an "automatic" compliance system. The point of a compliance system is to ensure that humans are involved, because ultimately one or more persons must take personal and legal responsibility for compliance. Another challenge is the fact that, in an organization of any appreciable size, monitoring and other activities are likely to occur among a number of people in disparate locations. These challenges are compounded by the fact that human performance differs from that of computers: People are prone to make a variety of errors of perception and calculation, including forgetting to enter information, neglecting to enter it in a timely fashion, and sometimes overlooking items. In short, compliance management systems are complex sociotechnical entities whose smooth functioning involves a blend of technical, human, and social factors.

Our concern is with the design of socio-technical systems that span large organizations. In this paper, we report on the design and use of a shared, dynamic visualization of organization-wide processes to aid tracking and managing compliance. We argue that the use of a visualization can amplify human cognition at an individual level, and that when it is visible to all participants, it will evoke social processes that can aid in managing compliance. At the same time, the shared nature of the visualization means that privacy becomes a key issue for ethical, cultural, and legal reasons, and so the design of the visualization involves making careful choices about the circumstances under which information is made visible to others.

MANAGING RISK AND COMPLIANCE

While there are a number of eminently practical reasons that companies should be concerned with managing their risks, the current interest in this domain is driven by recent legislation by the United States Congress. It is useful to understand this legal context, as it is the direct driver of the current push to devise better tools to support risk and compliance.

The Sarbanes-Oxley Act

SOX was signed into United States law on July 30, 2002, largely in response to a number of major corporate and accounting scandals. It establishes new or enhanced standards for corporate accountability. All publicly traded companies in the United States need to comply with this legislation. The scope of the law and the nature of the controls it specifies mean that compliance requires considerable work on the part of companies. In view of this, SOX is being put into effect on a staggered schedule, each section going into effect on a different date. The following are the main sections of the law:

* Section 302/906-Corporate Responsibility for Financial Reports

* Section 404-Management Assessment of Internal Controls

* Section 409-Real-Time Issuer Disclosures

* Section 802-Records Management

Section 302 of SOX is already in effect. To comply with section 302, the chief financial officer (CFO) and chief executive officer (CEO) must personally certify the accuracy of financial statements and the efficacy of internal disclosure controls. Disclosure controls must be established and enforced at all levels within the company, with quarterly evaluation of the efficacy of controls by the company. All significant deficiencies, material weaknesses, and acts of fraud must be disclosed to the audit committee. The company must establish and emphasize a culture of integrity, and the CEO and CFO must have confidence and trust in the people and process.

Section 404 for accelerated filers (companies with a public float greater than $75 million) went into effect in November 2004. For nonaccelerated filers, the date has been extended to July 2007. It requires that management file annual reports on internal controls, and that these reports be attested to by external audit firms. All controls relating to financial reporting must be documented and tested for efficacy. All gaps and deficiencies of such controls must be reported. Companies must demonstrate an ability to monitor control compliance.

Sections 409 and 802 are not yet in effect. The ongoing implementation of section 404 and the pending implementation of sections 409 and 802 suggest that the way organizations manage their risk and compliance processes will be in flux for the near future, and that, in turn, there will be a significant need for approaches that facilitate an organization's ability to deal with these issues.

Before the advent of SOX, IBM already had a welldefined control process. This process was further developed to support SOX, and particularly SOX 404 reporting, the latter focusing on management oversight of internal controls, including quarterly evaluation of each control.

By the time we started working with the IBM controllers, all the controls had been identified and categorized by business process and by country. For example, one control-in the Accounts Receivable process category-requires that adjustments be checked to ensure that management has approved all adjustments that are not financial in nature; this control is tested in several countries, including Argentina, Australia, Austria, Belgium, and Brazil.

As one would expect, the process of testing controls is not automatic. Even if this were possible, it is not desirable, because SOX requires that individuals take personal responsibility for certifying the accuracy and efficiency of the control processes. Thus, people are an integral part of the system. Each process has an owner who monitors the set of controls in effect for that process (a process owner may own several processes); each country has an owner who monitors the controls for that country; and each control has an owner who is responsible for seeing that the appropriate number of tests are run each quarter (or each testing period) and that defects are investigated, reported, and remediated. Process owners are responsible for coordinating the people who own their process controls and for determining that the defects are real, rather than a problem with the control itself.

Monthly reporting from the globally distributed owners for each control is supported by a formbased front end to a database, and all control information is stored in the database. A quarterly scorecard is generated that provides summary information about the control status, such as the number of unremediated defects since inception to date, the number of defects for the current quarter, and the number of samples for the current quarter. The scorecard is rolled up by business unit and business process.

Overall, IBM monitors on the order of hundreds of controls spanning dozens of countries (though not every control is relevant to every country). This generates a significant amount of data, and the problem of managing it is nontrivial, particularly because of the dynamic and distributed nature of the controls and control-related information.

IMPORTANCE OF VISUALIZATION

This section addresses why visualization is a promising approach to compliance management. This discussion draws on work in the field of social computing (e.g., Erickson and Kellogg and Olson and Olson2).

The term visualization might refer to a wide range of representations, from static depictions of data to full interactive applications. We primarily discuss interactive visualizations, though some or even many of the cognitive, motivational, and social benefits of visualizations that we discuss could be realized as static displays. However, in most cases the benefits are enhanced when the user has the ability to filter, interact with, and manipulate the data. In the section "Lessons Learned," we contrast dashboards (a static representation and not always of visualized data) with interactive visualizations. For an interesting example of an interactive visualization, see Reference 3.

Visualization at the individual level

There is a large body of research literature on information visualization and the cognitive effects of perceiving and conceptualizing information; summarizing it is beyond the scope of this paper.

Instead, we draw on the categorization and explanation of the benefits of visualization by Card et al., particularly how visualizations can increase people's visual capabilities and amplify cognition.4 They outline six ways in which visualizations can provide benefits: (1) by increasing memory and processing resources available to the user, (2) by reducing the search for information, (3) by enhancing the detection of patterns, (4) by enabling perceptual inference, (5) by using perceptual attention mechanisms for monitoring, and (6) by encoding information in a malleable medium.

Cognitive psychologists have built up an empirical picture of these benefits over the last 30 years. For example, visualizations can increase working memory and the cognitive processing resources available to a user because some visual elements can be processed in parallel by the (relatively fast) human perceptual system; some work that would otherwise be performed by the slower and limitedcapacity cognitive system can be offloaded to the perceptual system; and keeping pertinent details "in the world" rather than in the user's head can increase the amount of working memory that can be devoted to problem solving.7

Visualizations can reduce the effort needed to search for information because they are dense, portraying a large amount of data in a small space. They can enhance pattern detection through aggregation and abstraction of data (when this is combined with the ability to focus down to details, it can be particularly effective). Visualizations support perceptual inference, making some problems obvious and allowing a large number of elements to be monitored. Finally, when visualizations are interactive and malleable, they can be directed by users to examine particular areas of interest.

Visualization for groups

Visualization is also a powerful tool when used by groups of people to collaborate, particularly across distances. Erickson and Kellogg use the concept of social translucence to explain why this is so: Visualizing people and their activities leads to awareness and mutual accountability. Socially translucent systems create common resources by which people can more effectively coordinate their behavior. Such systems also support the emergence of social dynamics-such as peer pressure, imitation, the creation of norms, accountability, and other phenomena-that help to motivate collective effort toward common goals. In a series of studies of a socially translucent group-chat tool called Babble, Erickson and colleagues documented several effects on group process, including encouraging informal expression, minimizing the social overhead required for information exchange, and allowing remote members to keep in touch and quickly reestablish context.10,11

Similar social dynamics can emerge from information visualizations. Erickson et al. describe the task proxy, a visualization of the state of a task by individuals throughout an organization. In this representation, information about the task is in the foreground, so that its overall state can be discerned at a glance, but the elements of the task state reflect whether individuals have completed their bit of the task or not. Exposing such a visualization to the people in the organization generates social dynamics, such as peer pressure ("I'd better get this done; I'm almost the last one"), requests for assistance ("I see Tessa is already done; I'll ask her if the update messed up her system"), or offers of assistance ("No one in John's group has started on this; I'd better let them know"). The visualization provides a mirror to the organization of its own behavior and common ground for task participants to discuss what is happening and to coordinate task completion.

Halverson and colleagues have taken a similar tack in creating a customizable interactive visualization for bug-tracking data in software development (see Reference 13 for a screen capture of the actual visualization). This visualization supports software developers and project managers in managing both technical and social issues. It does this because the visualization is compact, yet allows users to monitor for problems throughout an extremely large data set (over 10,000 bugs), and when shared among all the development team members, this visualization provides a basis for negotiating the priority of various bug fixes.

DESIGN PROCESS

The process of designing and deploying the risk and compliance visualization spanned almost two years. In this section, we describe the basic methods brought to bear on the process and the participatory approach we used to develop and deploy the design.

Figure 1 provides a high-level overview of the types and distribution of methods involved, and their relationship to the deployment. The key points illustrated by the figure are that we employed a number of different methods to advance the design process and that the different methods were often pursued in parallel (although there is a tendency for those in the upper portion of the figure to be used earlier than those in the lower portion of the figure). While it is not uncommon for design to be portrayed as a linear process, in our experience, such interleaved parallel activity is the usual case, especially when the design process involves working with multiple stakeholders in various organizations, as this one did (see Reference 14). Some activities, such as design experiments, can be started immediately by members of the core team, whereas others, such as structured interviews, may require lead time to set up (arranging to interview the CEO of a major financial institution can require considerable political work as well as waiting for an opening in his or her schedule), and still others, such as deployment, may be constrained by organizational processes.

Methods used

We began by familiarizing ourselves with the design territory. In addition to reading background material and literature, we interviewed people involved in compliance management. In parallel, we began a series of design experiments, which helped us develop a sense of the possibilities afforded by visualization techniques. We then implemented an early technical prototype and moved fluidly between design experiments, technical prototype development, and design conversations with our users and stakeholders. This work eventually culminated in a deployment, although we continued our other activities.

Structured interviews

We used structured interviews early in the design process to learn how IBM executives were thinking about risk and compliance. These interviews helped us understand the risk and compliance domain in general and the concerns of executives (who, under SOX 302, must certify the compliance process) in particular. The executives were primarily concerned with achieving a standard and unified approach to controls testing and reporting processes used in different parts of the organization. They viewed unification as essential if they were going to be able to monitor, manage, and track the controls testing data for the current quarter.

Design experiments

Learning by creating visualizations was an important part of the design process. Some visualizations took the form of quick sketches to explore an idea, such as exploring how to present a high-level view of an organization's compliance. Others were detailed explorations of a particular design feature; for example, we created four alternative designs to explore how to represent the state of compliance of a business process, and we did a series of sketches to investigate how to structure the compliance representation to best reveal interesting patterns in the data. We used storyboarding techniques to explore the details of interactions through a particular use of the visualization. For example, we created a storyboard to demonstrate to IBM controllers how they would use a compliance visualization to identify and focus on a particular defective control that needed attention.

Design conversations

We held detailed conversations with end users and stakeholders about specific design problems. The conversations ranged from e-mail exchanges to semiformal meetings, and topics ranged from general issues to discussions focused on a specific design issue, storyboard, or iteration of a design solution. For example, after meeting with controllers to learn about their process and discuss the design problem, we exchanged e-mails in which we asked specific questions about their process, such as how it was represented and encoded in the controls database, how they used the controls database to support their process, and their scheme for numbering controls.

Technical prototypes

To ensure that our designs were technically feasible, we built working prototypes of some that we were considering deploying. Many were user-interface prototypes to explore the interactions we were proposing. We also conducted studies of how to structure the Extensible Markup Language (XML) from which the visualizations are generated. Finally, we used our technical prototypes to investigate performance and communication between the underlying analytic components and databases that we were intending to use.

Participatory approach

Our purpose was to create visualizations that would support real-world risk and compliance processes. As a consequence, it was critical to deploy our prototypes to the actual people who would be using the real system and to provide access to the actual data.

Doing this introduced a number of difficulties. The real nature of the work and the demands of the organizational contexts in which it took place often shaped what we did and how we had to do it. For example, because of the quarterly financial cycle, our prototype had to be ready to deploy for the fourth quarter, even though it was not as fully featured as we would have liked. Running a prototype against the actual SOX database was another challenge. The technology staff who hosted the SOX database was unwilling to let us deploy technology on their working server, and so we had to run against a replicated copy of the database. This limited our ability to create a visualization that reflected up-to-the-minute information in the database, as we could replicate only twice a day without affecting database performance. Although we were reassured by the executive controllers that the update frequency was sufficient, it proved to be insufficient for other stakeholders in the controls process.

Furthermore, we wanted the controllers to feel that they owned this system. That was one reason that we involved them early, engaging them in interviews and in conversations about various design experiments and technical prototypes. In addition, we decided that we should make use of their process for deploying new technology. Thus, although we hosted the prototype on our server, they created the training materials for it, announced it, and distributed it by means of a link from the corporate controls Web site.

WORKING VISUALIZATION

Our goal was to create an interactive picture to capture and summarize compliance data. We wanted users to see at a glance the processes and controls that needed further investigation. A good visualization should reveal patterns in the data that are important for understanding the current state of the compliance process and the actions that need to be taken. For example, the visualization should make it easy to see common controls tested in different countries that have unremediated defects or to see controls that repeatedly have remediated defects each testing period. It should then be possible through interaction with the visualization to obtain the information needed for necessary action on the part of the user, such as contacting the person responsible for a control.

Rationale

We anticipated that a visualization would support the monitoring of control status and the analysis of patterns of defects. In particular, a visualization should enable stakeholders in the control process to answer the question, "How is our organization doing?" Rather than the typical dashboard approach of providing a high-level summary to answer this question, we thought that it was important to provide a picture so that people could actually "see" how the organization was doing. This was accomplished by two tactics: using small colored shapes to represent the data of interest and grouping the data closely together so that visual comparisons were facilitated. Thus, for example, grouping controls by business process would allow people to monitor a particular process and to compare that process with others.

These tactics were critical to support monitoring and pattern recognition throughout this large data set. Pattern recognition is a central benefit of visual processing, and an appropriate visualization can support this process, changing the task from a cognitive one to a perceptual one.6 A visualization that contains a visual representation of each control and groups these controls along dimensions that are important for the control process should make it easier to spot patterns in the control data. Patterns that could be shown in a compliance visualization include processes with defective controls, controls with defects that have the same control process but are run in different countries, and repeated control defect-remediation cycles.

Although it is important to get an overview of the entire data set, it is also essential to be able to restrict the view in order to see more detail. Thus, filters are important so that more specific questions can be asked. Time and place are always important and allow for such questions as: "How is the United Kingdom doing?" and "How did we do last month?" Similarly, specific information about a process or control is also necessary to follow up on observed problematic patterns. Thus, clicking on different parts of the visualization should reveal more information.

Deployed prototype

Figure 2 is a visualization for the IBM SOX compliance process. (It is for illustration purposes only; the data is fictitious.) At the top is a gray header that contains the legend, a "View By" dropdown menu, and check boxes that allow the user to configure the control types shown in the visualization. Below the header, the screen is divided into three columns. The first column (left) contains a scrollable list of business processes ordered alphabetically. (In actuality, there are approximately 150 business processes.) Each colored shape represents a control for that process. Shading indicates whether the control had a defect the previous quarter, and its color indicates its status. The second column (middle) provides a more detailed view of a single process: It shows the controls for a selected process broken down by country. The third column (right) provides a view of the details of a single control. Thus, the visualization shows, from left to right, a view of all processes, a view of all controls of a single process broken down by country, and the details of a single control within a process.

An executive viewing the processes in the first column might wish to explore the topmost process, Accounting, noting that it has four magenta controls (i.e., controls with defects), and a number of other controls that are under-tested (yellow) or have no data at all (gray). Selecting this process would provide an expanded view of it in the middle column (as shown), with its controls grouped by country. Thus, the executive could quickly see that-while the controls in Italy, the United Kingdom and the United States are in fairly good shape-Canada, China, Denmark, and Spain give more reason for concern.

When the executive clicks on a particular control in the middle column, the details for that control appear in the right column. These details include a description of the control and the root causes and action plans for any defects. The control that is selected in the figure is in Denmark and is indicated by a heavy blue border around the shape. Its details are shown in the right column. Some other controls in the middle column (in Canada and China) are also highlighted by a thin black border. These represent the same control, but run in different countries. These controls are also listed at the bottom of the right column.

From the drop-down menu on the left, the user can group the controls in the first column either by the business process, as shown in the figure, or by country. When the left-column view is by country, the middle column becomes a breakdown of the controls for the country by process. Using the check boxes, the user can turn the display of controls of a certain status or type on and off. Thus, for example, the user might choose not to show controls that are fully tested, and when he or she unchecks that option, the green squares are not shown in the visualization.

The end result is an interactive visualization that shows aggregate status at one instant with the ability to selectively explore particular elements in greater detail. A consequence of this approach is that users will have to negotiate a learning curve to interact with the visualization effectively. Without some training and experience, they may find it difficult to understand the significance of what is shown, to navigate the data, or to best configure the visualization to serve particular needs.

DEPLOYMENT

The deployment took place between December 2005 and February 2006. The deployed version was written in Squeak (an open-source version of Smalltalk) and required downloading a plug-in. The availability of the compliance visualization was announced on the front page of the IBM corporate controls Web site, and there was a link (with a "NEW" bubble icon) to a page describing the visualization and the pilot deployment. The visualization was updated twice daily with a current snapshot of control data.

Because we ran the pilot near the close of a financial quarter-a very busy period for our users-the pilot involved only 20 participants. The global controls coordinators, both those responsible for particular processes worldwide and those who were responsible for particular countries, were the main participants. They are responsible for monitoring the controls for a specific process or set of processes, or a specific country or set of countries.

We used a number of methods to collect feedback. First, a "Provide Pilot Feedback" button on the visualization (see Figure 2) was used to point the participants to a wiki where they were able to provide written feedback. second, we interviewed seven of the controls-process and country owners who participated in the pilot deployment. Third, we conducted an online survey that gathered input from seven different controls-process and country owners, asking them about their role in the controls process, their experiences using the controls database and scorecard, and their feedback on the visualization. Finally, we talked to the controls process executive team-the group that provided input during our participatory design processabout the deployed design.

LESSONS LEARNED

In this section we report on the lessons learned to date, based on the nearly two years of work described herein. This is a work in progress and is directed toward a very particular situation. Nevertheless, we believe that these observations can provide value to others pursuing similar efforts.

Visualizations as user interfaces to control tasks

A visualization should be thought of as a user interface to a control task, not as a report or a report component. The visualization was designed to support the controllers, and in particular, the team of controllers who were overseeing the SOX controls process. It was this team that participated in our design process, and consequently, their needs and influences shaped what we produced. When we were doing our design work, they were looking for a reporting solution, that is, a view that would substitute for the quarterly scorecard which they used to summarize their data. Because their main interest was in seeing compliance status across all their processes, we chose not to support the input of control data in the prototype, but, we learned this did not serve the needs of other controllers. Several controllers who did not participate in the design process reported that while they liked the visualization that provided an overview and allowed them to see the controls status and compare global controls across countries, they still needed access to the database. As one informant said, "Any time I see something that doesn't look right, I need to do something."

From our post-pilot interviews and surveys of the participants, we learned that the controls testing, monitoring, and reporting tasks are complex. There are many subtasks and items that need to be tracked. Examples mentioned by our interviewees include: keeping track of how many tests need to be run and at what intervals; ensuring that defects are due to particular errors, as opposed to systemic issues with that control; and tracking the e-mail exchanges about control remediations and action plans. They also mentioned other activities that occur in support of compliance management: e-mail exchanges, phone meetings, surveillance of the CFO dashboard, forays into the controls database to find out detailed information about a particular control, and filling out forms to add information to the controls database. This suggests that controllers are already using many tools and doing many small subtasks as part of their overall responsibilities. This, in turn, necessitates continual switching between tasks and tools and leads to overload and frustration. Thus, although our visualization was quite attractive to those whose primary job was overseeing the state of compliance, it was "just one more tool" to those who were involved in managing details of the process. Nevertheless, we believe that an interactive visualization of the sort we designed has promise as a single online place that controllers can go to perform compliance-related tasks. In addtion to providing input to the database, it should provide an integrated view and allow access to all the functions that controllers require. It would be even better if the visualization also provided integrated support to track the state of all the components of subtasks, even those initiated in a separate tool, such as e-mail; it would be useful if the visualization could allow controllers to see the e-mail trail for a particular control.

To create a visualization that provides this additional functionality is a considerably larger and more complex design task. The complexity is not so much due to the work of integrating the additional functionality as it is to the logistic and political issues raised by deploying an application that changes and updates the data in the actual corporate SOX database. Such changes would require that our work become an integral part of the complex and lengthy software development process for technology that is created and deployed for IBM internal business support. The decision to begin our design work with a visualization that could be pointed at a cordoned-off replica of the real data was not just due to the interests of those controllers involved in our design process; it was also a politically feasible way to integrate a research system into the core practices of a working organization.

Visualizations as landscapes

Visualizations should show a landscape, not an isolated summary view. A common type of solution to manage risk and compliance is the executive dashboard.16,17 We started our design work by exploring such dashboards. They typically provide a series of portlets that show the summary status of different aspects of a business. The Hyperion dashboard is one of the best dashboards in the industry. The executive user can view the summaries reported in these portlets to get an overview of the current status of the organization and can hone in on any problem areas. Typically, a user can click on an item and be provided with more detailed information. From our interviews with executives early in the design process and from our own experiences designing such dashboards, we learned that such summary visualizations do not provide the executive with an adequate integrated picture of the status of the organization. While the dashboard provides iconic abstractions representing the data of the individual controls, the picture of the organization that it provides is at too high a level. The patterns that are important for users to manage are at the level of the controls. For example, executives told us that they needed to be able to see which controls are failing in multiple countries, or which countries have multiple controls with open action plans. Most important, the executives told us that they needed to see the specific defective controls, as these were the ones of concern. One commented: "Here's the real issue. Let me get underneath. I look at this report and I don't know whether I'm in trouble. The fact that I have an unremediated defect is not a show stopper." Reporting the data abstracted away from the control details means that the executive must inspect each of these separate reports, determine the details, and integrate these details into a coherent mental picture. This is a lot of work.

Also, depending on the metrics used to create the visualization, the summary status can be misleading. Understanding the true status of an organization's compliance requires "seeing" the details underlying the summary. That summaries are misleading was evident in a number of our design explorations in which we attempted to use a single object to represent a whole body of processes. The downfall of this idea was that one was unable to see how many processes comprised that object. Often even the smallest of trouble spots needed immediate attention, but these small trouble spots were overpowered and lost in the status of the majority. In short, to monitor compliance, averages or other summary statistics are often not what is needed. One needs a display that brings the problem areas to the foreground and permits their immediate identification, even if they are proportionately small.

For example, in one of our initial designs, individual controls were not shown; rather a block representing the business process was shown, and the color of that block was to be determined either by averaging the status across controls or by showing the color of the control with the "worst" status. To see the status of individual controls required a mouse-over on a particular process. Even using the "worst" control status to determine the color of the process block did not give the controllers sufficient information to determine which process needed their immediate attention. Because it was important to know how many controls for a process had defects, using the average control status to determine color was not helpful either, as there might be the same number of controls with defects in a large block of magenta as in a smaller block of magenta. A heat-map visualization, by its very nature, draws attention to large blocks of magenta, whereas, for controllers, blocks of both sizes need their attention.

In response to this, we created a representation that depicted the actual controls along with the use of color to show status. With this, the controllers can visually inspect the representation and compare the relative size of the blocks of color to determine the extent to which a particular business process is in compliance. The feedback we collected suggests that this representation appealed to the controllers and was readily understood. One drawback, however, is that several controllers did complain that the control shape was too small in size, and the difference between the shapes was hard to discern. This is the downside of a landscape approach, which puts all the information on one screen.

Although our initial analysis of dashboards had led us to discount summary statistics, feedback from the deployment caused us to reconsider this position and arrive at a more nuanced understanding. Controllers told us that summary statistics do provide a useful high-level orientation. One remarked, "A graphical view would be useful in reporting if I could capture a view and put it in a status report. Sometimes you get lost in the spreadsheet numbers, where a graph can make a point a whole lot better."

Because all controls could not be seen on one screen, users wanted to know the number of controls of different status, for example, how many controls had unremediated defects. Although summaries are a good way of reporting what happened during the quarter, they are not a good approach for day-to-day management of compliance. It does not help a controller to know that four controls have defects; the controller needs to know the specific controls, who owns them, and what is being done to remediate those defects. Further, knowing that there are four controls with defects this quarter and there were four controls with defects the previous quarter does not let the controller know whether these are the same four defects, and so on. Thus, while summary statistics are insufficient on their own, they are not without value. The best solution is a combination: summary statistics that provide orienting information and a landscape visualization that provides an overview of processes and controls and a way to obtain detailed information from an integrated context.

Visualizations as part of an evolutionary process

Visualizations must be able to evolve as the process for an individual or a group evolves or as the overall compliance process evolves. While the controls database is defined to support the generic controls process, individual processes may have exceptions. For example we were told by one of the process controllers that his process is not broken down in terms of countries (as is defined by the generic process), but in terms of brands. To use the controls database, the unique structure of this process was mapped to the database structure. However, because this was done by creating an individual process for each brand, comparisons of controls across brands could not be made. Such a comparison would be useful, because the same control runs in different brands, just as for other processes the same control runs in different countries. A second example described by an interviewee is a process in which some of the controls are tested on a schedule that is different from the quarterly schedule set up in the database. This means that for some of the controls, there will be missing data one quarter, because that control is only tested twice a year. Having the visualization show "Missing Data" for that control is misleading, as the data is not missing; it is just not expected to be there. The information about how often each control should be tested is not kept in the database, but in a separate spreadsheet.

Not surprisingly, exactly what information controllers need to see depends on what they need to do. For example, executives who have responsibility for overseeing the whole control process need to have a view of all the processes and be able to see the proportion of controls with defects. They would also like to see how important a defect is in relation to financial risk. In contrast, controllers who are overseeing a specific country or process need to see just those controls for which they are responsible and the underlying details. It is these detailed views that are important to them, as they need to make sure that appropriate actions are being taken by control owners to remediate the control. Although we did not talk to any control testers, presumably they would want to see how their controls were doing, ensure that their status was accurately reflected in the database, and that no mistakes had been made in data entry.

In addition, for a particular controller or group of controllers, what they need to see and do depends on where they are in a reporting period. The work is cyclic, and the tasks change across the testing and reporting cycles. For example, controllers told us that during the quarter when they are monitoring the status of controls and checking on any remediations in progress, they need to be able to focus on the data for a particular control. At the end of the quarter, when they are reporting the results of the testing, they need to see overviews and summary information. Being able to associate the kinds of views they are looking at with a personal or organizational time line would add significant value to such a visualization.

We had assumed that the overall compliance process was defined, thus defining the visualization needed to show the patterns in the compliance data. However, we learned through our experience working with the controllers that the compliance process is continually being refined. As controllers go through the process and make use of the data, their understanding of how a compliance process might work evolves, their notion of what data can be collected changes, and they use the data to answer new kinds of questions. For example, when we interviewed process owners, they requested that trends be added to the visualization so that they could see the behavior of controls over time. They had recently started to experiment with viewing data this way and integrating trend analyses into their quarterly reports. When probed further, we learned that as the controls process had now been running for some time, there was sufficient historical data to make trend analysis worthwhile. We found this point interesting, as we had probed the importance of a historical view of the data in some of our original design sketches. However, because these design sketches had not received particularly positive reactions at the time they were presented, we had placed such views lower in our design features list.

The evolution of the controls process leads to new requirements for the visualization. This suggests that-just as the visualization needs to allow individuals and groups to create custom views to support their unique variants of the process-the overall visualization needs to be malleable as the generic controls process evolves. For example, a customizable visualization would maintain the same visual elements, but allow these elements to be associated with different organizational structures. It would also allow visual features, such as color, to be associated with different control attributes.

Visualizations as support for communication and coordination

A single picture created from a "visual language" that maps to the domain elements can support communication and coordination among people who are focused on different parts of the task and concerned with different granularities of analysis. Controllers work in teams and need to coordinate with respect to the current status of the controls. They reported that the scorecard is insufficient for coordination as it does not provide detail down to the control level. It is at the level of the individual control that problems typically need to be addressed, and communication among a control owner, country owner, and process owners about individual controls are typical. Controllers do coordinate by referencing the database to see a description of the defect. One controller pointed out that this description was missing from our visualization (a feature we needed to add immediately). Controllers also use the database for initial information on what actions have been taken regarding a particular control. Although controllers use the database in these ways, they spend a large amount of time communicating by e-mail and telephone. In particular, controllers whose responsibility it is to monitor processes or countries typically act as alerters, that is, they send an e-mail to the appropriate people when they need to attend to an issue at a particular time. Also, groups working on one process tend to have regularly scheduled status meetings to ensure that everyone is aware of any change to controls and of the progress made on problematic issues.

Our design participants felt that the visualization could support their coordination tasks and make their alerting role easier. Unfortunately, due to limitations of the deployment (too few users and too short a deployment time), we were unable to verify this. However, we believe that the visualization could be extended to better support alerting activity with the addition of alert tracking and timing features. For example, allowing the controller to specify alerts of the form: "Send an alert to Marge Johnson if control 10 is not remediated by June 24, 2006." Further evidence that such an alerting feature is important came from some process owners who stated that the visualization might reduce the number of e-mails being exchanged among those managing the overall SOX compliance process and the process owners. At the same time, they also raised the concern that such a visualization might lead to micromanagement, because it increased the desire to ensure that there would be no magenta on the display each quarter; that is, there would not be any controls with unremediated defects. They felt this would not be a good thing, as often there was a reason for a control to have an unremediated defect, and as long as that control was being managed appropriately, there was no need to bring additional pressure to bear on process owners (which would, in turn, require additional e-mails to explain what was happening). As one participant commented, "I don't need anyone looking over my shoulder. 'Missing' could be misinterpreted by someone unfamiliar with the process. [...] I don't want someone jumping to a conclusion. I don't have that concern with the scorecard because no one is looking. [But] I like this visualization a lot better than the scorecard. I like this." One way to manage this issue, explored by Erickson et al., might be to restrict the ability of users to see and communicate with owners of controls for which they are not directly responsible. Another possibility would be to refine the set of states for controls to include a classification for "unremediated but being effectively managed" controls.

The need for personalization and customized views is problematic from a social computing standpoint. For a visualization to enable coordination of work, it needs to provide a shared view of the information. This allows people to point to something on the screen and have a shared context for conversation. Once people start customizing views, the shared context is lost. As one informant put it, "I wouldn't go completely away from the canned views. They are valuable, especially where reporting, [it] is useful that everyone is looking at it the same way." For this reason, we would argue that customized views need to be shareable. Furthermore, there needs to be a single visual language used so that the concepts and objects important for SOX controllers have a single and consistent visual referent. For example, in our visualization, the visual language represents an operational control as a small circle and a defect as a magenta color. These shapes and colors can be reused in different custom views, so long as the mapping between the visual language and the domain is maintained. Thus, a process name written in magenta text, for instance, would probably indicate to all people familiar with the visual language that the process had a defect.

CONCLUSION

Visualizations can play an important role in facilitating compliance processes throughout an organization. Reducing the complexity of the process by turning cognitive operations into perceptual ones is key to this simplification. Providing a picture that can be used as a common point of reference for conversation and communication is another crucial attribute of visualizations. This is particularly important when compliance is a global process involving multiple languages and cultures. While a single picture is important, individuals who have different roles and responsibilities within the process have different tasks they need to perform, and thus must be able to create custom views of the whole. These customizations can be achieved through filtering and support for multiple organizations. Custom views and filters must maintain the same visual language and be shareable so that they support effective communication among stakeholders about the status of the compliance process.

Organizational processes are dynamic; they evolve in response to organizational pressures and learning. Visualizations that support such processes must be malleable if they are to continue to be used as the process evolves. This requires support for customizing so that those most familiar with the changing process, typically the end users (the controllers in the case of the SOX visualization described here), can transform their visualization as the process changes.

In this paper, we have focused mainly on a specific example of a design process and the resulting system for an internal risk and compliance application. However, we believe that many aspects of both the design process that we describe and elements of the solution hold as well for a wide variety of similar application areas. In particular, there are numerous other regulations that require organizations to assess and address risks and to ensure that they are in compliance. In the United States, such areas include tax laws, equal opportunity laws, Occupational Safety and Health Administration standards, accessibility standards, environmental standards, privacy, and ensuring the physical security of people, plants, assets, and data. Although these laws, standards, and regulations differ from country to country, the basic issues of awareness, comprehension, and compliance are universal. In each case, there is a need for cooperation and collaboration, the issues are complex, and a well-designed visualization can help. In all of these areas, a great deal of change has occurred as business and the regulatory environment have co-evolved, and there is every reason to believe that change will continue. Thus, fostering an organizational culture that is conducive to competence in these areas and providing a compelling interactive and visual way to approach issues of compliance can be expected to be more effective and less confusing than simply issuing employees an ever-changing set of rules and regulations.

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SIDEBAR

We learned through our experience working with the controllers that the compliance process is continually being refined

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HEADLINE: Data-driven decisions: The VIEW from THE dashboard

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ABSTRACT

Today's dashboards draw directly from data warehouses or even from multiple databases, and are far more interactive. "Organizations have become much better at creating a smooth data surface for dashboard reporting," [Mychelle Mollot] says. "The ERPs and data warehouses are much better as source transaction systems." The technology to allow users to drill down and ask a series of related questions is robust, and customers are gaining competitive advantage from it.

ABSTRACT

Decision-making in organizations is based on a complex mix of rational and intuitive thinking. One way to help make sense of enterprise data is to use a dashboard to support business performance management. Dashboards provide summary data from business intelligence (BI) systems so that CEOs, managers and employees can get an instant reading of key performance indicators for their organization's activities. A recent survey of corporate decision-makers, conducted by the Business Performance Management (BPM) Forum, indicated that only 26% of the organizations had a well-established, formal process for making decisions. Dashboards are developed from the top down to reflect the strategy of the company, says Cognos VP of market strategy and strategic communications Mychelle Mollot. Usability is a key factor in the success of dashboards, according to MicroStrategy VP of products Mark LaRow.

FULL TEXT

Decision-making in organizations is based on a complex mix of rational and intuitive thinking. Amidst abundant data, organizations find it difficult to make decisions in which they are confident. One way to help make sense of enterprise data is to use a dashboard to support business performance management.

Dashboards provide summary data from business intelligence (BI) systems so that CEOs, managers and employees can get an instant reading of key performance indicators for their organization's activities. Increasingly, the dashboards are presenting information that is updated on a daily or even real-time basis. The indicators can be in the form of speedometers, gauges, traffic lights or other graphical representations, and are often colorcoded to provide red, yellow and green alerts. Dashboards are available from essentially all of the leading BI companies, and third-party companies have developed many specialized dashboards.

A dashboard developed for Novartis (novartis.com), using business intelligence software from Cognos (cog nos.com), is a typical example of how dashboards can be used effectively. The drug manufacturer has a complex distribution network and was unable to see patterns in orders that would support decision-making. Using the Order Management Dashboard in conjunction with its AS400 order management system, Novartis staff can spot unusual order patterns early, allowing the company to adjust inventories. In addition, the summary data allows Novartis to assess how much product is still in transit and better predict potential return quantities.

Confidence level

In today's environment of abundant data, it might be assumed that data-driven decisions are the norm. However, a recent survey of corporate decision-makers, conducted by the Business Performance Management (BPM) Forum (bpmforum.org), indicated that only 26 percent of the organizations had a well-established, formal process for making decisions. In addition, only 40 percent of the respondents had a high level of confidence in their organization's current process for making decisions.

Moreover, a gap existed between the C-level executives and low- to mid-level managers. While 64 percent of the upper-level group had a high level of confidence in their organization's decision-making process, only 36 percent of the lower-level group held that opinion. One possible interpretation for the confidence gap between management levels is that the upper-level executives have access to better data; another is that they are intrinsically more confident.

Gaining insight into information

Whatever the case, there are many indications that the decision-making process in organizations could stand some improvement. Articles abound in the business media with titles such as "Why Good CIOs Make Bad Decisions," and examples of decisions that had major adverse effects on corporations are also prevalent. Despite the overall lack of confidence, only about 14 percent of the survey respondents reported turning to a technology solution, such as planning, forecasting, reporting analysis, scorecarding or dashboarding. Some poor decisions can be alleviated by the use of technology, while others cannot.

"Having an unclear corporate vision, mission or goals was identified as a leading root cause of poor decision making," says Scott Van Camp, editorial director of the BPM Forum. "It would be difficult for a technology application to overcome this type of deficiency." Nor can it directly counteract fraud and deception, although it can make such activities more transparent.

Where technology can help the most is in the analysis and presentation of data. "Many organizations are information-rich and insight-poor," says Mychelle Mollot, VP of market strategy and strategic communications at Cognos. "They have lots of databases where information is stored, but no means to get it out and used."

The value of the dashboard is not just in the summary it presents, but also in the process through which the organization travels in order to develop it. "Dashboards are developed from the top down to reflect the strategy of the company," says Mollot. In much the same way that business process management software forces companies to make their processes more explicit, business performance management solutions require thought about what is really important to measure.

Dashboards can also be set up to show summaries of data from multiple systems that are not interoperable. That is a great advantage for organizations that want to compare data across departments; they can set up a single warehouse into which the data is delivered or even draw it directly from the disparate systems. For companies that have grown through acquisition and are trying to achieve a unified view across divisions that do not have a common IT infrastructure, that ability is particularly useful.

Early versions of dashboards were called executive information systems and had a similar goal, but they were not connected to original source data. They were derived from various databases and required significant input from the IT department. In fact, they were not sustainable.

Today's dashboards draw directly from data warehouses or even from multiple databases, and are far more interactive. "Organizations have become much better at creating a smooth data surface for dashboard reporting," Mollot says. "The ERPs and data warehouses are much better as source transaction systems." The technology to allow users to drill down and ask a series of related questions is robust, and customers are gaining competitive advantage from it.

Another difference in more recent dashboards is that they can be set up to present different views depending on the user's role. "Dashboards are often designed to cascade," says Mark EaRow, VP of products at MicroStrategy (microstrategy.com). At the top level, data is rolled up to show the big picture, but depending on roles, functions and levels, other users see a smaller slice of data. Once the system is set up, the underlying data can be used to provide a concise snapshot to a wide range of recipients with varying needs.

At Corporate Express (corporate express.com), a supplier of office and computer products, MicroStrategy's BI solution allows 2,000 employees to monitor business performance at various levels. Known for its ability to deal with large databases, MicroStrategy's product operates against a 4.5-terabyte Oracle (oracle.com) data warehouse. The executive team relies on a dashboard to monitor customer buying trends and enterprise performance. At Lowes (lowes.com), MicroStrategy provides merchandising and executive dashboards.

Usability is a key factor in the success of dashboards, according to LaRow. "You should not underestimate the value of convenience and clarity." The right information needs to be in the dashboard, naturally, but the dashboard should also engage the user.

"The real power of dashboards," he adds, "is that you can take multiple sets of data and array them on a screen that leads you to want to see another set of data right next to it." For example, an HR director looking at a spike in attrition might want to check out demographics, salary, length of tenure or other factor in attempting to explain the trend. The dashboard should allow this interactivity.

Fine-tuning the interface should be deferred for a while, though. "Don't try to make the interface pixel-perfect right away," advises LaRow. "The dashboard is likely to evolve over the first four to six months, then stabilize. Spend some time on the iterations, then finalize the look." Developers can get bogged down in making the dashboard attractive, deflecting too much attention from its functionality.

Like any decision support tool, dashboards must be used wisely. Some important determinants of success that operate within a firm cannot easily be quantified, and therefore are rarely measured. Failing to incorporate those factors into the decision-making process can send an organization down the wrong path. Other forces operating outside the company, while quantifiable (such as interest rates), may not be reflected in the dashboard, even though they may exert an influence greater than any under the organization's control. But to the extent that what can be measured can be managed, dashboards offer a valuable option for helping companies cope with the data avalanche.

By Judith La mont, KMWorld senior writer

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BYLINE: John Goff

HIGHLIGHT:
New budgeting-and-planning software offers increasingly sophisticated visual aids: dashboards and scorecards.

BODY:

When Marc Krens joined John I. Haas Inc. 12 years ago, the privately held company was hardly a font of technological sophistication. The 10 businesses that constituted Haas, the world's largest supplier of hops for brewing, all used different accounting and financial-reporting software. Worse, the programs didn't talk to one another. As for the company's inventory-management system, "the code was in German," recalls CFO Krens, "and the guy who wrote it died."

Today, Krens is busy updating the information systems of the 81-year-old company. Much of the effort is aimed squarely at strategic planning, which until recently involved an Excel spreadsheet and a homemade model that he devised. Three years ago, Krens and his team convinced senior management at $80 million (in revenues) Haas to purchase OFA, a financial-analysis program designed by Oracle Corp. More recently, the CFO has championed the deployment of an Oracle dashboard at the Washington, D.C.-based company.

When the rollout of the dashboard is finished (it is scheduled for May 2004), Haas managers and department heads will be able to track key performance indicators from a desktop portal. Krens himself plans to monitor a greatest-hits collection-metrics culled from the dashboards of other users. "Every day," he says, "managers will be able to see how they're doing on their benchmarks."

This kind of approach has big appeal for finance managers-a fact not lost on makers of applications for finance managers. Over the past year or so, several marquee business-software vendors have acquired smaller budgeting-and-planning (B&P) outfits. Geac Computer bought Comshare, Lawson Software acquired Closedloop Solutions, and Hyperion Solutions acquired Brio Software. In the process, they've picked up considerable dashboard and scoreboard capabilities. Likewise, enterprise resource planning (ERP) vendors like Oracle and SAP AG have begun to beef up the dashboard features of their enterprise offerings.

The dashboards are selling, too. According to a June survey of 100 companies conducted by AMR Research, nearly 50 percent of respondents said they will (or plan to) roll out dashboards in the coming months. John Hagerty, a vice president at AMR Research, says that overall, sales for B&P software are up about 6 percent from the same period in 2002, and dashboards are helping fuel the increase. "Forecasting is very hot right now," says Hagerty. "Most people need a forward-looking view."

For many finance managers, the view from their existing budgeting tools-usually a patchwork of Excel spreadsheets-seems more like a glance through the rearview mirror. Often, managers must piece together budgets based on extremely historical data: last year's results. And creating a strategic plan from Excel-based forecasts offered up by scores of operating units can be a real pain. "Planning is important," says Colleen Johnston, managing director and CFO of Toronto-based Scotia Capital, which recently rolled out a planning system from INEA Corp. "But the work is disproportionate [to the reward]."

Web-enabled or portal-accessed performance dashboards, now part of robust B&P applications, offer some relief. At the very least, the technology can eliminate a lot of scut work. In many cases, dashboards sit on top of data warehouses or relational databases and are powered by superfast calculating engines within B&P software. The combination, consultants note, can make reforecasting a snap.

That's a considerable accomplishment, considering that many CFOs would rather have wisdom teeth extracted with bailing twine than run a reforecast. Before deploying a B&P program and dashboard from Clarity Systems last April, for example, monthly reforecasts at Jim Beam Brands took two weeks to complete, says Don Rogers, controller at the whiskey maker. "We dreaded it," he notes. "People were pulling their hair out."

And now? "Reforecasting takes five minutes."

Worts and All
 Ironically, dashboards would have arrived on the scene much earlier if it hadn't been for, well, dashboards. In the 1980s, software providers began flogging fancy dashboard products under the highfalutin name of executive information systems. While the systems promised plenty-and looked great-they took forever to roll out, and delivered little. Rejiggering a system required a phalanx of consultants and up to a year of recoding.

Today's breed of dashboards are much easier to use and much easier to put up. Online loan broker LendingTree Inc., for example, rolled out its Hyperion-designed dashboard in a matter of months. "Most of the employees involved with the dashboard are financial folks," notes CFO and senior vice president Keith Hall. "The tech people did not put this together."

That ease of design, coupled with a generally improving data infrastructure at most corporations, has finance executives tracking all sorts of nonfinancial metrics on their dashboards. Gary Willenbrecht, manager of corporate reporting at medical-instrument maker Beckman Coulter Inc., says he uses his dashboard (from OutlookSoft Corp.) to monitor, among other things, the number of diagnostic machines the company has sold or leased to hospitals, laboratories, and the like. This installed base, he says, provides insight into future revenue streams from the company's consumables line of products. .

How? The Fullerton, California-based company's medical-diagnostic machines require reagents to test blood samples, and only reagents sold by Beckman Coulter work with the testing equipment sold by Beckman Coulter. "As you place units out there, you have a semicaptive audience," explains Willenbrecht. "If you see the installed base is growing, the consumables base is increasing."

At Haas, CFO Krens is still evaluating the metrics he wants on his dashboard. He'll probably include standard gauges like revenues (actual, historical, and budget), cash flow, and receivables. But given the unique nature of the hops business, it's fair to say that Krens's dashboard will feature some oddball items as well.

For example, Krens notes that some brewers place their orders for hops in January and February, although most hops aren't harvested until the fall (hops serve double duty, protecting beer and adding flavor and aroma). Hence, it's crucial for Haas to know how much product the company will have available to fill orders-not exactly a slam dunk when you're talking about a crop.

To get a handle on crop yield, Haas maintains an agronomy department in the Yakima Valley in Washington State, and the company operates a production facility for each of its three 1,000-acre farms in Washington and Oregon. The department tracks temperature and rainfall information, predicts harvests based on past weather/yield patterns, and conducts testing of growth on the vines.

The crop report, along with metrics taken from the dashboards of managers in other departments such as human resources and sales, will probably end up on Krens's dashboard. "The department heads know their business better than I do, so they're developing their own metrics," he notes. "I'll glean one or two from each to get a full view of the company."

Red Light, Green Light
 The view on many B&P dashboards can be color-coded, to help users spot variances and avoid nasty surprises. On LendingTree's "Packer chart," for example, a 5 percent or better favorable variance to budget is green, says Hall, while a 5 percent or worse unfavorable variance is yellow.

Most dashboards feature a traffic-light setup, with a red signal flagging sizable negative deviations. That sort of eye-grabbing visibility can cause problems, however. "If a certain business sector is having a bad quarter, you can end up with too much red on the screen," notes Beckman Coulter's Willenbrecht. That can stir up hard feelings among employees. "Some people say it's too distracting," he adds.

Indeed, some users say the technology can be overwhelming at times. Not surprisingly, vendors that tout dashboards and B&P software as part of a corporate performance-management suite tend to trumpet the full-and we mean full-capabilities of their products. In some cases, screens contain 20 or more charts, graphs, and visuals. "The [vendor's] argument," says Lee Geishecker, research vice president at consultancy Gartner, "is, 'Your business is complicated, and our software gives you everything you need.'"

Sometimes, more than you need. Progress Rail, an Albertville, Alabama-based railroad services and products specialist (2002 revenues: $900 million), recently deployed a dashboard product from SAS. CFO David Klementz says the company's management is pleased with the product so far. In fact, he says the next phase of the rollout will involve adding a greater degree of "resolution" (granularity) to the information presented on screen. But, Klementz cautions, it's crucial to balance resolution with perspective. It's important to keep the data useful, he explains, but users could end up with a system that's impossible to manage if there are too many metrics being tracked.

Finance executives know exactly what Klementz is talking about. They're also pretty familiar with long, costly rollouts of software. Mark Dani, financial systems analyst at Accelrys Inc., says the San Diego-based scientific-software maker recently decided to move from Excel-based budgeting to an enterprisewide approach-a big step up. But, he says, officers wanted an application that would be readily picked up by employees. They settled on Active Planner, a program marketed by Best Software Inc. "It has an Excel-ish look," notes Dani. "We wanted the learning curve to be minimal."

That appears to top the wish list for many shoppers of dashboards and B&P offerings. Controller Rogers says that when Jim Beam's managers began shopping for a B&P product, they looked at an extremely powerful offering from a well-known business-intelligence (BI) vendor. But they decided not to buy it. How come? "You need Jedi [knights] to run the stuff," claims Rogers.

What's Wrong with Quicken?
 Ultimately, Jim Beam purchased a B&P program from Clarity Systems. The application cost $50,000, compared with $250,000 for the app from the spurned BI vendor. Initially, the dramatic price difference was a cause of concern for Jim Beam's management. "The [Clarity] software was so cheap," says Rogers, "we wondered if we were buying Quicken to close our books."

In reality, the wildly varying prices probably say more about marketing strategies than software. Most ERP vendors, for instance, don't sell B&P apps (or performance dashboards) separately. Rather, they market the programs as modules within larger, enterprisewide packages. The vendors stick to enterprise pricing as well: dashboard deployments with those software makers can run as high as $500,000.

Niche players offer more-reasonable prices, often below $250,000. In fact, according to an AMR Research study of dashboard rollouts, 37 percent of respondents said they had budgeted less than $100,000 for their dashboard and scorecard projects.

But shoppers who have come to expect serious discounting from software vendors may be in for a bit of a surprise when dealing with B&P outfits. Unlike customer relationship management software, planning apps are in demand right now. "[B&P] vendors are not that hungry," says AMR Research's Hagerty. "There's some ability to negotiate, but the vendors are not giving it away."

On the other hand, high sticker prices might have a silver lining-if, that is, they prod buyers to make better plans for buying planning software.

John Goff is technology editor of CFO.

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BYLINE: Scott Wallace

BODY:

'The meaning of EIS," quips Cliff Conneighton, an analyst at the Gartner Group Inc., "is changing from 'executive information system' to 'everybody's information system.' "

Historically, executive information systems have offered a carefully crafted view from the executive suite into the repository of corporate data-familiarly known as the "glass house." But with data and processing migrating from the mainframe to the desktop, looking at centralized information often provides only part of the picture. Moreover, as organizations decentralize, workers further down the organizational chart need access to the fast-changing, user-focusable perspectives that an EIS can offer. The result is that old-style, centralized executive information systems are evolving into-or competing with-more distributed desktop systems.

While cheap desktop MIPS (millions of instructions per second) and robust local area networks are often part of an EIS, workstations and networks are widely viewed as expediting, rather than enabling, the deployment of the executive system. "The trend is to take advantage of the fact that users already have familiarity with some PC tools," says Conneighton, program director for office information systems at the Stamford, Conn., consultancy. "In addition, more and more of the important data is no longer just the transactional data off the financial system. It's likely to be application data found on the LAN, on a departmental file server, or in somebody's spreadsheet," he points out.

Exactly what an EIS is has always been somewhat elusive, observes Claire Gillan, manager of application solutions for International Data Corp. in Framingham, Mass. "When EISs started to take off, the distinction between decision support systems and executive information systems was that a DSS was more of an interactive, analytically intensive tool, while an EIS focused more on summarizing critical data, offering someone who was not a computer 'power user' an easy way to look at data," says Gillan.

As hardware and software technologies have evolved, end users have come to expect an EIS to deliver both a user-friendly interface and access to analytical routines that turn data into information and then support tracing that information back to its source data.

One such EIS application is in use at Heidelberg Harris USA, a $300 million manufacturer of sheet-fed printing presses in Dover, N.H. Tom Fontaine, VP of IS, explains how Harris came to build its distributed, PC-based suite of applications, known internally as the "Financial Dashboard." This set of applications replaced the "Blue Book," a financial "planned-versus-actual" report that didn't come out until the 15th of each month, says Fontaine. The Blue

Book also required a lot of time to read and interpret. "Now, depending upon how they set up their view, managers can be as current as the last order processed through accounts payable," he says.

The Financial Dashboard collects data-some of it in real time from manufacturing stations-to assemble information and present a view of Harris's operations. That's quite a feat, given that operations span a 700-node wide area network with sites in Durham and Dover, N.H.; Nashville, Tenn.; Westerly, R.I.; and Fort Worth, Texas, in addition to offices in Mexico, France, and Germany.

Despite its name, the EIS at Harris is not reserved for upper-level managers alone. "Senior management didn't want to see pie charts unless they felt comfortable that the underlying data was good; they wanted the operating management to review it. We were almost forced into moving [the EIS] down the organizational chart," recounts Fontaine. "Now, at the highest levels, they're seeing very summary-level information. But they know they can bore down through that and get to the real data."

The consistent user interface the EIS provides is one of its major benefits, says Fontaine. "Financial Dashboard was just a forerunner of downsizing most of our applications," Fontaine explains. "Every time I changed from a mainframe-based application to a PC-based application, I had to change all the reporting mechanisms. This way, I can give my users a constant interface. Even though I'm changing the world, it's transparent to them; everything looks the same."

ON BOARD THE ENTERPRISE

User interface consistency is a hallmark of Pratt & Whitney's Enterprise Support System (ESS). East Hartford, Conn.-based Pratt & Whitney, a division of United Technologies Corp., manufactures jet engines for commercial and military aircraft. The company's ESS is based upon Commander, an EIS from Comshare Inc. in Ann Arbor, Mich.

"Traditional systems that service an organization's information needs require a tremendous commitment to training," says Walter Dempsey, manager of ESS development in the business management and planning department. "Those systems are impregnated into departments based on functions, and when you switch to another function, you have no idea how to get information. You've got to be trained all over again."

But Dempsey says Pratt & Whitney's ESS will change all that. "We'll see many more systems with EIS front-ends because they're intuitive," he says. "A very intuitive user interface eliminates the training process. It eliminates the tremendous time lag to bring useful information back to the business. And it's the biggest productivity enhancement you can find."

Like Harris, Pratt & Whitney is making the transition from a mainframe-based, centralized environment to a networked, desktop one. But that move is not essential to successfully implementing the company's ESS. "EIS is technology transparent," Dempsey contends. "Some people say, 'If I don't have a data infrastructure in place, I can't proceed with an EIS.' But that's not true. You'll never have the data infrastructure in place because the business is always changing."

Pratt & Whitney's ESS is the company's most serious effort to date to distribute the right information to everyone that needs it, says Dempsey. That information concerns insights into operations that are continually in a process of flux. "We're not talking about data that exists; we're talking about brand new data that we have to go out and collect," says Dempsey.

In an ever-changing business environment, one thing remains constant: The customer comes first. Pratt & Whitney's customers have have one fundamental need: to keep their planes in flight. "The real sin in our business is an aircraft on the ground; it results in a direct loss of revenue to our customers," explains Dempsey. How does the ESS help with customer service? The system is designed to not only ensure that adequate spare parts are available whenever and wherever needed, says Dempsey, but also to monitor management of the company's engines in the field, to assess engineering and R&D investments, and to understand how customer support representatives can improve product reliability.

Because the ESS cuts across departmental boundaries, development does not take place in traditional ways. "It's not the old development technology or mentality," maintains Dempsey. "At Pratt and Whitney, it involves a partnering between MIS and the business units. We'll talk about what the needs are, but it's no longer the needs of marketing or of product support, it's the whole business."

DISTRIBUTED DATA

At Tropicana Products Inc. in Bradenton, Fla., manager of sales planning Steve Goodfriend is upgrading the company's 13-year-old sales information system to an EIS from Effem Services Inc. of Mount Olive, N.J. "One of the key changes we've made is that the system is no longer a 'headquarters only' tool: we've distributed the information out to our regional offices throughout the United States," says Goodfriend.

Corporate executives use their X-terminals to access Tropicana's EIS and take advantage of its graphical capabilities. Regional and traveling managers dial-in for a character-based version of the system's suite of pre-defined reports and views. But the system not only provides more comprehensive and timely information, it has also caused some fundamental organizational changes. "There's been a lot more teamwork between sales and MIS. The EIS is not just a sales system nor is it just an MIS system," says Goodfriend.

Harry Grossman, director of management science at Citicorp's U.S. Card Products Group in Hagerstown, Md., also says his EIS has altered some fundamental business processes at his company. Based on a system from Pilot Executive Software in Boston, Grossman's EIS tracks operational statistics of Citicorp's customer service telephone representatives. "Our Automatic Call Distributors [ACD] consist of two components: one that distributes calls to the agents and monitors the call flow and one that generates statistics on that flow," says Grossman. "The ACD normally generates lots of paper reports. We went into the ACD and wrote some code that electronically transfers those reports to our EIS every half-hour."

The raw data on employee performance is structured into a series of views that provide both summary and detailed data on productivity, availability, and work quality. "We recognized as we were building the system that we were providing good information to senior executives. But the real solutions to problems rested not with the senior executives but with several levels of management down-with the line managers who were really responsible for achieving our productivity goals," Grossman says. "The system will allow us to identify who our top performers are and to implement a fact-based, pay-per-performance system."

United HealthCare Corp. in Minnetonka, Minn., offers a variety of management and specialty services to health-care providers. The company uses its Comshare EIS, workstations, and communication linkages to provide health plan managers, employee benefit managers, and pharmacy managers with performance and cost information. "The system helps them better manage their costs and utilization of services," says Rochelle Wooley, director of managed care reporting systems.

United HealthCare's EIS is unusual in that access to it is provided on a fee basis to its customers. "It's a wonderful marketing tool for the health plans to help their customers understand the kinds of services their employees are receiving," Wooley says. "If, for instance, there is a high incidence of back pain for a particular employer group, the plan can work with that group to put together health education programs."

At Xerox Canada Inc. in Ontario, a Comshare-based EIS system is providing executives with automatically updated information on service activities. "We have about 1,700 sales reps in Canada; we track how many calls they're getting on a day-by-day basis, how many calls they're able to complete, and how many customers' problems haven't been resolved," says Sheilah Reid, manager of decision support system for the company's IS division.

Another major change is that the system forces a commonality of perspective and definition across the entire company. "It's no longer possible to be in a management committee meeting and have somebody present their numbers followed by somebody else with totally different numbers on the same topic," says Reid. "We have concurrence on terminology that moves us away from private ownership of data; now it's on the executive system."

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James Dean

ed, -head•ing, -heads. — *tr.* 1. To pilot or drive (a vehicle) carrying no passengers or freight. 2. To pull (dead or dying blossoms) off a flower. — *adv.* Without passengers or freight.

dead heat *n. Sports.* A race in which two or more contestants compete evenly or finish at the same time.

dead letter *n.* 1. An unclaimed or undelivered letter that after a time is destroyed or returned to the sender by the postal service. 2. A law, directive, or factor formally in effect but no longer valid or enforced.

dead lift *n. Sports.* A weightlifting event in which the weight is lifted from the floor to the level of the hips and then lowered by controlled effort to the floor.

dead•light (dĕd′līt′) *n.* 1. *Naut.* a. A strong shutter fastened over a porthole in stormy weather. b. A thick window in a ship's side or deck. 2. A skylight that cannot be opened.

dead•line (dĕd′līn′) *n.* 1. A time limit, as for payment of a debt. 2. A line in a prison that prisoners can cross only at the risk of being shot. — *tr.v.* **-lined, -lin•ing, -lines.** To govern by setting a time limit.

dead load *n.* The fixed weight of a structure or piece of equipment, such as a bridge on its supports.

dead•lock (dĕd′lŏk′) *n.* A standstill resulting from the opposition of two unrelenting forces. — *tr. & intr.v.* **-locked, -lock•ing, -locks.** To bring or come to a standstill.

dead•ly (dĕd′lē) *adj.* **-li•er, -li•est.** 1. Causing or tending to cause death. 2. Suggestive of death. 3. Wanting to kill; implacable. 4.a. Destructive in effect: *a deadly critique.* b. Tending to take away vitality, effectiveness, or force. 5. Absolute; utter: *deadly concentration.* 6. Extreme or terrible. 7. Extremely accurate; unerring. 8. Dull, tedious, and boring. — *adv.* 1. So as to suggest death. 2. To an extreme. — **dead′li•ness** *n.*

deadly nightshade *n.* 1. See **belladonna** 1. 2. See **bittersweet nightshade.**

deadly sin *n.* One of the seven sins — anger, covetousness, envy, gluttony, lust, pride, and sloth — that are regarded as fatal to one's soul.

dead-man's float (dĕd′mănz′) *n. Sports.* A prone floating position in which the swimmer's arms are extended straight forward above the head and the legs are held together.

dead march *n. Mus.* A slow, solemn funeral march.

dead nettle *n.* Any of several weedy plants of the genus *Lamium,* having clusters of small, usu. purplish flowers.

dead-on (dĕd′ôn′, -ŏn′) *adj. Informal.* Precisely accurate and to the point.

dead•pan (dĕd′păn′) *n.* 1. An expressionless face. 2. A person, esp. a performer, who has or assumes a blank expression. — *adj.* Impassively matter-of-fact, as in style or expression: *deadpan humor.* — *adv.* With a deadpan face. — *tr. & intr.v.* **-panned, -pan•ning, -pans.** To express or express oneself in a deadpan way.

dead point *n.* See **dead center.**

dead reckoning *n.* 1. A method of estimating the position of an aircraft or a ship without astronomical observations, as by applying to a known position the course and distance traveled since. 2. Prediction based on inference; guesswork. [Poss. alteration of *ded.,* abbr. of *deduced* < *deduce,* to trace from the beginning. See DEDUCE.]

Dead Sea (dĕd). A salt lake, c. 397 m (1,300 ft) below sea level, between Israel and Jordan; the lowest point on the earth.

dead weight *n.* 1. The weight of a heavy motionless mass. 2. An oppressive burden or difficulty. 3. See **dead load.**

dead•wood (dĕd′wo͝od′) *n.* 1. Dead branches or wood on a tree. 2. One that is burdensome or superfluous. 3. *Naut.* The vertical planking between the keel of a vessel and the sternpost.

deaf (dĕf) *adj.* **deaf•er, deaf•est.** 1. Partially or completely lacking in the sense of hearing. 2. **Deaf.** Of or relating to the Deaf or their culture. 3. Refusing to listen. — *n.* 1. Deaf people considered as a group. 2. **Deaf.** The community of deaf people who use American Sign Language. [ME *def, deef* < OE *dēaf.*] — **deaf′ly** *adv.* — **deaf′ness** *n.*

Usage Note: Some writers have lately introduced a distinction between the lowercase noun *deaf,* which is used to refer simply to people with extensive hearing disorders, and the capitalized noun *Deaf,* which refers to the community that uses American Sign Language as a primary means of communication.

deaf•en (dĕf′ən) *v.* **-ened, -en•ing, -ens.** — *tr.* 1. To make deaf, esp. momentarily by a loud noise. 2. To make soundproof. — *intr.* To cause deafness. — **deaf′en•ing•ly** *adv.*

deaf-mute also **deaf mute** (dĕf′myo͞ot′) *Offensive.* — *n.* A person who can neither hear nor speak. — *adj.* (dĕf-myo͞ot′). Unable to speak or hear.

deal¹ (dēl) *v.* **dealt** (dĕlt), **deal•ing, deals.** — *tr.* 1. To give out as a share or portion; apportion. 2. To distribute among several recipients. See Syns at **distribute.** 3. To sell: *deal cocaine.* 4. To administer; deliver: *dealt him a blow.* 5. *Games.* a. To distribute (playing cards) among players. b. To give (a specific card) to a player while so distributing. — *intr.* 1. To be occupied; treat: *deals with the Middle Ages.* 2. To behave in a specified way toward another or others; have transactions: *deals honestly with me.* 3. To take action with respect to someone or something: *dealing with complaints.* See Syns at **treat.** 4. To do business; trade: *dealing in diamonds.* 5. *Games.* To distribute playing cards. — *n.* 1. The act or round of apportioning or distributing. 2. *Games.* a. Distribution of playing cards. b. The cards so distributed; a hand. c. The right or turn of a player to distribute the cards. 3. An indefinite quantity or degree. 4. An agreement often arranged secretly, as in politics. 5.a. A business transaction. b. An agreement, esp. one that is mutually beneficial. 6. *Informal.* A sale favorable esp. to the buyer; a bargain. 7. *Informal.* Treatment received: *a raw deal.* [ME *delen* < OE *dǣlan,* to divide, share. See **dail-***.]

deal² (dēl) *n.* 1. A fir or pine board cut to standard dimensions. 2. Fir or pine wood. [ME *dele* < MDu. and MLGer. *dele,* plank.]

de•a•late (dē-ā′lāt′) or **de•a•lat•ed** (-lā′tĭd) — *adj.* Having lost the wings. Used of insects that shed their wings after a mating flight. — *n.* A dealate insect. — **de′a•la′tion** *n.*

deal•er (dē′lər) *n.* 1. One engaged in buying and selling: *drug dealer.* 2. *Games.* The one who distributes cards.

deal•er•ship (dē′lər-shĭp′) *n.* A franchise to sell specific items in a certain area.

deal•fish (dēl′fĭsh′) *n., pl.* **dealfish** or **-fish•es.** An Atlantic ribbonfish *(Trachipterus arcticus)* having a compressed, tapering silvery body. [< DEAL².]

deal•ing (dē′lĭng) *n.* 1. **dealings.** Transactions or relations with others, usu. in business. 2. Method or manner of conduct in relation to others; treatment: *honest dealing.*

de•am•i•nate (dē-ăm′ə-nāt′) *tr.v.* **-nat•ed, -nat•ing, -nates.** To remove an amino group, NH_2, from (an organic compound). — **de•am′i•na′tion** *n.*

de•am•i•nize (dē-ăm′ə-nīz′) *tr.v.* **-nized, -niz•ing, -niz•es.** To deaminate. — **de•am′i•ni•za′tion** (-nĭ-zā′shən) *n.*

dean (dēn) *n.* 1.a. An administrative officer in charge of a college, faculty, or division in a university. b. An officer of a college or high school who counsels students and supervises the enforcement of rules. 2. *Eccles.* The head of the chapter of canons governing a cathedral or collegiate church. 3. *Rom. Cath. Ch.* A priest appointed to oversee a group of parishes within a diocese. 4. The senior member of a body or group. [ME *deen* < OFr. *deien* < LLat. *decānus,* chief of ten < Gk. *dekanos* < *deka,* ten. See **dekm̥***.] — **dean′ship′** *n.*

Dean (dēn), **James Byron.** 1931–55. Amer. actor whose films include *East of Eden* and *Rebel Without a Cause* (both 1955).

Deane (dēn), **Silas.** 1737–89. Amer. diplomat who persuaded France to supply aid to the Revolutionary cause.

dean•er•y (dē′nə-rē) *n., pl.* **-ies.** The office, jurisdiction, or official residence of an ecclesiastical dean.

dean's list (dēnz) *n., pl.* **deans' lists.** A list of students, esp. in a college, who have attained high academic rank.

dear¹ (dîr) *adj.* **dear•er, dear•est.** 1.a. Loved and cherished: *my dearest friend.* b. Greatly valued; precious: *lost everything dear to them.* 2. Highly esteemed or regarded. Used in direct address, esp. in salutations. 3.a. High-priced; expensive. b. Charging high prices. 4. Earnest; ardent. 5. *Obsolete.* Noble; worthy. — *n.* 1. One that is greatly loved. 2. An endearing, lovable, or kind person. — *adv.* 1. With fondness; affectionately. 2. At a high cost: *sold their wares dear.* — *interj.* Used as a polite exclamation, chiefly of surprise or distress. [ME *dere* < OE *dēore.*] — **dear′ly** *adv.* — **dear′ness** *n.*

dear² (dîr) *adj.* Severe; grievous. [ME *dere* < OE *dēor.*]

Dear•born (dîr′bôrn′, -bərn). A city of SE MI W of Detroit. Pop. 89,286.

Dearborn, Henry. 1751–1829. Amer. soldier and politician who fought in the American Revolution.

Dearborn Heights. A city of SE MI, a suburb of Detroit. Pop. 60,838.

Dear John (dîr) *n.* A letter, as to a serviceman, requesting a divorce or ending a personal relationship.

dearth (dûrth) *n.* 1. A scarce supply; a lack. 2. Shortage of food; famine. [ME *derthe* < OE **dēorthu,* costliness < *dēore,* costly. See DEAR¹.]

death (dĕth) *n.* 1. The act of dying; termination of life. 2. The state of being dead. 3. The cause of dying. 4. A manner of dying: *a heroine's death.* 5. Often **Death.** A personification of the destroyer of life, usu. represented as a skeleton holding a scythe. 6.a. Bloodshed; murder. b. Execution. 7. *Law.* Civil death. 8. The termination or extinction of something. — *idioms.* **at death's door.** Near to death; gravely ill or injured. **be the death of (someone).** To distress or irritate (someone) to an intolerable degree. **put to death.** To execute. **to death.** To an intolerable degree; extremely. [ME *deeth* < OE *dēath.* See **dheu-²***.]

death angel *n. Bot.* See **death cup.**

death•bed (dĕth′bĕd′) *n.* 1. The bed on which a person dies. 2. The last hours before death.

death benefit *n.* Insurance money payable to a deceased person's stipulated beneficiary.

death•blow (dĕth′blō′) *n.* 1. A stroke or blow that causes death. 2. A destructive event or occurrence.

death camas also **death camass** *n.* Any of several plants of the genus *Zigadenus* of western North Ame… of greenish flowers and are poisonous …

death cup *n.* A poisonous, usu. white … *phalloides)* having a prominent cup-sh…

death duty *n. Chiefly British.* A tax on … inheritance tax.

death house *n.* See **death row.**

death instinct *n. Psychiat.* 1. A primitiv… tion, decay, and death, manifested by … pleasure, postulated by Sigmund Freud … opposing the life instinct. 2. Death wis…

death•less (dĕth′lĭs) *adj.* Not subject to … immortal. — **death′less•ly** *adv.* — **dea…**

death•ly (dĕth′lē) *adj.* 1. Of, resembling … death: *a deathly silence.* 2. Causing deat… the manner of death. 2. Extremely; ver…

death mask *n.* A cast of a person's face …

death penalty *n.* A sentence of punishm…

death rate *n.* The ratio of total deaths t… a specified community or area over a spe…

death rattle *n.* A gurgling or rattling soun… the throat of a dying person, caused … through mucus.

death row (rō) *n.* The part of a prison for … have received the death penalty.

death's-head (dĕths′hĕd′) *n.* The human … mortality or death.

deaths•man (dĕths′mən) *n. Archaic.* An …

death tax *n.* 1. See **inheritance tax.** 2. S…

death•trap (dĕth′trăp′) *n.* 1. An unsaf… structure. 2. A perilous circumstance or …

Death Valley. An arid desert basin of E C…

death warrant *n.* 1. *Law.* An official orde… son's execution. 2. Something that destro… tion; a deathblow.

death•watch (dĕth′wŏch′) *n.* 1. A vigil ke… dead person. 2. One who guards a conde… execution. 3. A deathwatch beetle.

deathwatch beetle *n.* Any of several woo… of the family Anobiidae, esp. *Xestobium r…* head makes a clicking sound that was supe… as a portent of death.

death wish *n.* 1. *Psychiat.* A desire for sel… accompanied by feelings of depression, ho… reproach. 2. The desire for the death of … ward whom one has unconscious hostility…

Deau•ville (dō′vĭl, dō-vēl′). A resort city of … English Channel. Pop. 4,682.

deb (dĕb) *n. Informal.* A debutante.

deb. *abbr.* Debenture.

de•ba•cle (dĭ-bä′kəl, -băk′əl) *n.* 1. A sudd… fall, or defeat; a rout. 2. A total, often … 3. The breaking up of ice in a river. 4. A … *débâcle* < *débâcler,* to unbar < OFr. *desb…* *bacler,* to bar, ult. < Lat. *baculum,* rod. S…

De Ba•key (də bā′kē), **Michael Ellis.** b. 19… who implanted the first totally artificial … being (1966).

de•bar (dē-bär′) *tr.v.* **-barred, -bar•ring, -b…** or shut out; bar. 2. To forbid, hinder, or … *barren* < OFr. *desbarer,* to unbar : *des-,* d… (< *barre,* bar; see BAR¹).] — **de•bar′ment** …

de•bark (dĭ-bärk′) *v.* **-barked, -bark•ing, -b…** load, as from a ship or an airplane. — *intr.* … *débarquer* : *dé-,* from (< OFr. *de-*; see DE-… (< OFr.; see BARK³).] — **de′bar•ka′tion** (d…

de•base (dĭ-bās′) *tr.v.* **-based, -bas•ing, -ba…** character, quality, or value; degrade. See … [DE- + BASE².] — **de•base′ment** *n.* — **de•…**

de•bat•a•ble (dĭ-bā′tə-bəl) *adj.* 1. That can … cussed. 2. Open to dispute. — **de•bat′a•bl…**

de•bate (dĭ-bāt′) *v.* **-bat•ed, -bat•ing, -bat…** consider something; deliberate. 2. To engag… discussing opposing points. 3. To engage in … sion or argument. 4. *Obsolete.* To fight … 1. To deliberate on; consider. 2. To dispute … 3. To discuss or argue (a question, for ex… 4. *Obsolete.* To fight or argue for or over. … sion involving opposing points; an argument. … consideration. 3. A formal contest of argume… two opposing teams defend and attack a gi… 4. *Obsolete.* Conflict; strife. [ME *debaten* <… *de-,* de- + *battre,* to beat; see BATTER¹.] — d… — **de•bat′er** *n.*

de•bauch (dĭ-bôch′) *v.* **-bauched, -bauch•i…** — *tr.* 1.a. To corrupt morally. b. To lead a… lence or virtue. 2. To reduce the value or qu… 3. *Archaic.* To cause to forsake allegiance. — … in dissipation. — *n.* 1. The act or a period … 2. An orgy. [Fr. *débaucher* < OFr. *desbauchie…* rough-hew timber : *des-,* de- + *bauch,* beam … — **de•bauch′ed•ly** (-bô′chĭd-lē) *adv.* — **de•…**

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called also respectively (1) *transmission deafness, conduction deafness,* or *conductive deafness,* (2) *perceptive deafness* or *nerve deafness,* and (3) *central deafness, cortical deafness,* or *psychic deafness*

deaf nettle *n* : a dead nettle (*Lamium purpureum*)

deaf nut *n* 1 : a nut with no kernel 2 : a thing without profit

de-air \(ˈ)ˈ+ˌ\ *vt* [*de-* + *air* (n.)] : to remove air from (wet clay) by pugging under vacuum thereby increasing wet strength and density

1**deal** \ˈdēl, *esp before pause or consonant* -ēəl\ *n* -s [ME *deel, del,* fr. OE *dǣl;* akin to OE *dāl* division, portion, OHG *teil* part, ON *deild* share, Goth *dails* part] 1 *obs* : PART, PORTION, SHARE 2 : an indefinite quantity, degree, or extent ⟨it makes a good ~ of difference⟩ ⟨it means a great ~ to him⟩ ⟨he hasn't got a great ~ of money⟩ 3 a : the act, process, or method of distributing cards to players in a card game b : the privilege or duty of acting as dealer ⟨it's my ~⟩ c : a period in the play of a card game embracing all phases from the shuffle through the determination or scoring of the result — compare HAND 10a(4) 4 : a large quantity : LOT ⟨a ~ of years —Raymond Moley⟩

2**deal** \"\ *vb* **dealt** \ˈdelt\ **dealt** \"\ **dealing** \ˈdēliŋ\ **deals** \ˈdē(ə)lz\ [ME *delen,* fr. OE *dǣlan;* akin to OHG *teilen* to divide, ON *deila,* Goth *dailjan;* denominative fr. the root of E 1*deal*] *vt* 1 *obs* : DIVIDE, SEPARATE, SEVER 2 a : to give as one's share or portion : DISTRIBUTE, APPORTION, METE ⟨*dealt* justice to all men⟩ — usu. used with *out* ⟨*dealt* out three sandwiches apiece⟩ b (1) : to distribute (one or more playing cards) to a player or the players in a card game (2) : to distribute the cards for (a specified card game) ⟨~ poker⟩ (3) : to act as dealer in (a specified game) ⟨~ craps⟩ 3 : ADMINISTER, DELIVER, BESTOW ⟨~ the boy a scolding⟩ ~ *vi* 1 *obs* : to be a sharer : SHARE 2 a : to distribute the cards in a card game b : to have the function or duty of distributing cards to the players in a card game c : to act as a dealer in a gambling game 3 a : to have to do : concern oneself : TREAT — used with *with* ⟨the book ~s with all aspects of the subject⟩ b : to become occupied or busy — used with *in* ⟨~*ing* in matters of no concern to him⟩ ⟨fond of ~*ing* in large generalities⟩ 4 : to act toward a person or regarding a thing : DO — used with *by* or *with* ⟨return … and I will ~ well with thee —Gen 32:9 (AV)⟩ 5 *archaic* : to have dealings — used with *with* ⟨~*ing* with witches —Shak.⟩ 6 *archaic* : to act as intermediary : make arrangements : NEGOTIATE — used with *with* or *between* 7 : to do a retailing or distributing business : TRADE, TRAFFIC — used with *in* before a thing ⟨he ~s in flour⟩ and with *with* before a person ⟨he ~s fairly with all his customers⟩ 8 *obs* : CONTEND, STRUGGLE, QUARREL — used with *with* 9 : to take action (as in regard to some object, problem, or source of difficulty) : come to grips — used with *with* ⟨he may ~ as he pleases with his own property⟩ ⟨had to ~ with a catastrophic inflation⟩ ⟨*dealt* with his problems as they arose⟩ ⟨*dealt* harshly with the rebels⟩ **syn** see DISTRIBUTE, TREAT

3**deal** \"\ *n* -s 1 *obs* : DEALINGS, INTERCOURSE 2 a : an act of buying and selling : an offering of a combination of products at a special price ⟨a package ~⟩ : a reciprocal arrangement or agreement : BARGAIN b : treatment received in a transaction from another ⟨a raw ~⟩ or from impersonal forces or circumstances ⟨a rough ~⟩ c *usu cap* : a particular policy of national administration esp. of economic or politico-economic affairs ⟨Theodore Roosevelt's Square *Deal*⟩ ⟨the New *Deal*⟩ ⟨the Fair *Deal*⟩ 3 : an often clandestine arrangement to gain mutual advantage for those interested : a negotiated settlement of an issue (as a lawsuit) ⟨law … has a way of beginning with ideals and ending with ~s —H.A.Overstreet⟩

4**deal** \"\ *n* -s [MD or MLG *dele* plank; akin to OHG *dili, dilla* plank, plank floor — more at THILL] 1 a *Brit* : a board of fir or pine cut to any of several specified sizes — see DEAL END, SLIT DEAL, STANDARD DEAL, WHOLE DEAL b *in the U.S. export trade* : sawed yellow-pine lumber nine inches and wider and three, four, or five inches thick 2 : pine or fir wood : deals in the aggregate ⟨a floor of ~⟩

5**deal** \"\ *adj* : made of deal; *broadly* : made of plain unfinished wood ⟨a ~ table⟩

deal apple *n* [4*deal*] : the cone of the white pine or of the fir

de·alate \dēˈā,lāt, -ˌlət\ *n* -s [*de-* + *alate*] : a dealated insect : a mature sexual individual of a kind of insect that undergoes dealation

de·alat·ed \-ˌlād·əd\ *adj* [*de-* + *alated*] : divested of the wings — used of postnuptial adults of certain insects (as ants and termites) that drop their wings after a nuptial flight — **de·ala·tion** \(ˌ)dē,āˈlāshən\ *n* -s

de·al·bate \dēˈal,bāt, -ˈȯl-\ *adj* [L *dealbatus,* past part. of *dealbare* to whitewash — more at DAUB] *bot* : covered with an opaque white powder

deal board *n* [4*deal*] : a fir or pine board : DEAL

deal end *n* [4*deal*] : a deal board less than six feet long — usu. used in pl.

deal·er \ˈdēlə(r)\ *n* -s [ME *delere,* fr. OE *dǣlere,* fr. *dǣlan* to divide + *-ere* -er — more at DEAL] 1 : one that divides, distributes, or delivers 2 *obs* : NEGOTIATOR, AGENT, GO-BETWEEN 3 : one that acts or conducts himself in some specified way toward others ⟨noted as a plain ~⟩ 4 : one that does business : TRADER, TRAFFICKER, MIDDLEMAN : a person who makes a business of buying and selling goods esp. without altering their condition ⟨a ~ in dry goods⟩ ⟨~ in stocks⟩ ⟨an automobile ~⟩ — compare MANUFACTURER 5 : one that buys and sells (as securities, commercial paper, or foreign exchange) on his own account — compare BROKER 1b 6 a *Brit* : STOCKJOBBER a — distinguished from *broker* b : a member of a stock exchange who buys and sells as principal rather than as agent for a customer 7 a (1) : a person who deals cards (2) : a machine or device for dealing cards b (1) : a gambler or employee of a gambling house who officiates at a game or gaming table (as a stickman, tourneur, croupier, or cashier) (2) : the chief among such persons : the person in charge of the table (as the stickman in craps or the tourneur at roulette)

dealer acceptance *n* : purchase by a retail merchant because of a known demand

dealer help *n* : promotional aid (as samples, counter or window displays, briefings for clerks) that is furnished retailers by manufacturers and wholesalers to stimulate sales of advertised products or to gain retailers' goodwill and continued patronage

dealer's choice *n* : a card game (as poker) in which the dealer may designate the variant to be played and set the stakes

deal·er·ship \-,ship\ *n* -s : an authorized sales agency : the business of a distributor ⟨an automobile ~⟩ ⟨a ~ for planes⟩

dealfish \ˈ+,+\ *n* [4*deal* + *fish*] : any of several long thin fishes of the genus *Trachypterus* inhabiting the deep sea — called also *ribbonfish*

deal frame *n* [4*deal*] : LOG FRAME

deal in *vt* : to include (a specified player) among those to whom cards are dealt ⟨*deal me in*⟩

dealing *n* -s [ME *deling,* fr. gerund of *delen* to deal] 1 : INTERCOURSE, TRAFFIC — usu. used in pl. ⟨~s with the devil⟩ 2 : method of business or manner of conduct ⟨underhand ~⟩

dealing box *n* : 1BOX 13

de·alkalization \(ˌ)dē+\ *n* -s : the process of dealkalizing

de·alkalize \(ˈ)dē+\ *vt* [*de-* + *alkalize*] : to remove alkali from : reduce the alkalinity of (as by neutralization)

de·alkylate \(ˈ)dē+\ *vt* [*de-* + *alkylate*] : to remove alkyl groups from (a compound) — **de·alkylation** \(ˌ)dē+\ *n* -s

deal lugger \ˈdē(ə)l-\ *n, usu cap D* [fr. *Deal,* municipal borough on the Strait of Dover, Kent, England] : a lugger formerly common on the southeast coast of England esp. in the ship-tender service

deal off *vi* : to deal the last hand of a poker game or the last hand in which one intends to participate

deal out *vt* : to omit (a specified player) from those to whom cards are dealt

deal pine *n* [4*deal*] : WHITE PINE 1a

deals *pl of* DEAL, *pres 3d sing of* DEAL

dealt *past of* DEAL

de·ambulatory \dē+\ *n* [LL *deambulatorium,* fr. L *deambulatus* + *-orium* -ory] : AMBULATORY

de·amidate \(ˈ)dē+\ *or* **des·amidate** \(ˈ)des+\ *vt* [*de-* or *des-* + *amidate*] : to remove the amido group from (a compound) — **de·amidation** \(ˌ)dē+\ *or* **des·amidation** \(ˌ)des+\ *n* -s

de·amidization \(ˌ)dē+\ *or* **des·amidization** \(ˌ)des+\ *n* -s : the process of deamidizing : DEAMIDATION

de·amidize \(ˈ)dē+\ *or* **des·amidize** \(ˈ)des+\ *vt* [*de-* or *des-* + *amide* + *-ize*] : DEAMIDATE

de·am·i·nase \(ˈ)dēˈamə,nās, -āz\ *also* **des·am·i·nase** \(ˈ)deˈsam-\ *n* -s [*de-* or *des-* + *amin-* + *-ase*] : an enzyme that hydrolyzes amino compounds (as amino acids) with the removal of the amino group

de·aminate \(ˈ)dē+\ *vt* [*de-* + *aminate*] : to remove the amino group from (a compound)

de·amination \(ˌ)dē+\ *or* **des·amination** \(ˌ)des+\ *n* : the process of deaminating ⟨the enzymatic oxidative ~ of glycine to glyoxylic acid and ammonia⟩ — compare AMINOLYSIS 2

de·aminization \(ˌ)dē+\ *n* -s : the process of deaminizing : DEAMINATION

de·aminize \(ˈ)dē+\ *vt* [*de-* + *aminize*] : DEAMINATE

1**dean** *var of* 1DENE

2**dean** \ˈdēn\ *n* -s [ME *deen,* fr. MF *deien,* fr. LL *decanus,* lit., chief of ten, fr. L *decem* ten + *-anus* -an — more at TEN] 1 *obs* : a chief of 10 men : TITHINGMAN 1 2 a : a head over 10 monks in a monastery b : the head of the chapter or body of canons or prebendaries in a collegiate or cathedral church c : a priest of the Roman Catholic Church appointed by a bishop to supervise the affairs of a group of parishes within the diocese — called also *vicar forane* 3 a : a resident fellow at an English university charged with the discipline rather than the instruction of undergraduates b : the head of one of the divisions, faculties, colleges, or schools of a university ⟨the ~s of several leading medical colleges⟩ ⟨the ~ of the faculty of arts⟩ ⟨the student must obtain the approval of the appropriate ~s and the chairmen of the departments concerned⟩ c : an administrative officer at a college or secondary school who counsels students on academic matters (as choice of program, maintenance of academic standing, honors, or failure) and who in addition has some disciplinary authority pertaining to such matters as breach of dormitory rules, unexcused absences, cheating and plagiarism, suspension, or dismissal ⟨~ of men⟩ ⟨~ of women⟩ ⟨~ of freshmen⟩ ⟨~ of the senior class⟩ 4 : a high officer of the orders of the Thistle and of the Bath who is always a clergyman — compare CHAPLAIN 5 : the senior of a group of men : DOYEN 1a

3**dean** \"\ *vi* -ED/-ING/-S : to act as dean ⟨was asked to ~⟩

dea·ner *var of* DEENER

dean·ery \ˈdēn(ə)rē, -ri\ *n* -ES [ME *denerie,* fr. *deen, den* dean + *-erie* -ery] 1 a : the office or position of a dean b : the residence of a dean 2 : the jurisdiction of a dean

deanery of christianity *usu cap C* : any of various British deaneries comprising certain city or town parishes (as Exeter or Lincoln)

dean·ess \-nəs\ *n* -ES : a nun who serves as dean in a convent

dean of a peculiar : a titular dean of the Church of England either without peculiar jurisdiction (as the dean of the Chapels Royal) or with jurisdiction but without a chapter

dean of christianity *usu cap C* : a holder of one of certain rural deaneries in England

dean of convocation : the president of a convocation in churches of the Anglican Communion

dean of guild 1 : the head of a guild (as in medieval and some existing European guilds) having the power to summon the members to meetings 2 : a magistrate of a Scottish burgh or town formerly having jurisdiction of mercantile causes within a burgh and still entrusted with the inspection of and control over the construction, alteration, or repair of buildings

dean of the arches *usu cap D&A* [fr. the Court of *Arches,* the court of appeal for the province of Canterbury] : a lay judge in an ecclesiastical court (as the chancery court of the province of York) : the official principal of the archbishop of Canterbury

deans *pl of* DEAN, *pres 3d sing of* DEAN

dean schedule \ˈdēn-\ *n, usu cap D&S* [after Albert F. *Dean* †1933 Am. actuary] : a system for measuring the relative fire hazard and determining fire insurance rates for a property by an analysis of location, structural features, occupancy, and exposure

dean's list *n* : a list of students receiving special recognition from the dean of a college because of superior scholarship

1**dear** \ˈdi(ə)r, -iə\ *adj* -ER/-EST [ME *dere* brave, bold, hard, severe, fr. OE *dēor;* prob. akin to OE *dēor* beast — more at DEER] : SEVERE, SORE ⟨our *dearest* need⟩ ⟨his *dearest* enemies⟩

2**dear** \"\ *adj* -ER/-EST [ME *dere,* fr. OE *dēore;* akin to OHG *tiuri* costly, ON *dȳrr*] 1 *obs* : GLORIOUS, WORTHY, HONORABLE 2 : regarded very affectionately or fondly : highly valued or esteemed : BELOVED ⟨ran for ~ life⟩ ⟨his son was very ~ to him⟩ ⟨the cause of democracy … is so ~ to us —M.R. Cohen⟩ — often used formally or affectionately in address ⟨*Dear* Sir⟩ ⟨my ~ James⟩ ⟨Mother ~⟩ 3 : LOVING, AFFECTIONATE, FOND ⟨for the ~ love I bear him⟩ 4 a *obs* : SCARCE b : high-priced or expensive either absolutely ⟨butter is cheap when it is plentiful and ~ when it is scarce —G.B.Shaw⟩ or relatively ⟨that wretched suit would be ~ at any price⟩ 5 *obs* : VALUABLE, IMPORTANT 6 a : close to the heart : present in mind : engaging the attention ⟨my ~*est* wish is for your happiness⟩ b : HEARTFELT, EARNEST ⟨one whose ~*est* prayer has been granted—G.B.Shaw⟩ **syn** see COSTLY

3**dear** \"\ *adv* [ME *dere,* fr. OE *dēore,* adj.] 1 : DEARLY ⟨the effort cost him ~⟩ 2 : FONDLY, AFFECTIONATELY

4**dear** \"\ *n* -S [ME *dere,* fr. *dere,* adj.] 1 : a dear one : DARLING, SWEETHEART ⟨that kiss I carried from thee ~ —Shak.⟩ 2 : a lovable person ⟨pretty little ~s⟩ : an endearing person or being ⟨carry this in for me, like a ~⟩

5**dear** \"\ *vt* -ED/-ING/-S [ME *deren,* fr. *dere,* adj.] 1 *obs* : to make dear : make high-priced 2 a : to address as *dear* b *obs* : ENDEAR

6**dear** \"\ *interj* [4*dear*] — used typically to express annoyance or dismay

dear·born \ˈdi(ə)r,bȯrn, -bərn\ *n* -S *sometimes cap* [after Henry A. S. *Dearborn* †1851 Am. politician and writer who maintained such a carriage] : a light 4-wheeled carriage with curtained sides

dearling *obs var of* DARLING

dear·ly *adv* [ME *derely,* fr. OE *dēorlice,* fr. *dēore* dear + *-lice* -ly — more at DEAR] 1 : in a dear manner: as a *obs* : PRECIOUSLY, WORTHILY, RICHLY b : with affection : FONDLY, AFFECTIONATELY ⟨to love one ~⟩ c : HEARTILY, EARNESTLY, DEEPLY, KEENLY ⟨the peace we so ~ seek —D.D.Eisenhower⟩ d : at a high rate or price ⟨the victory was ~ won⟩

dear·ness *n* -ES [ME *derenesse,* fr. *dere* dear + *-nesse* -ness] : the quality or state of being dear: as a : LOVABLENESS : endearing quality b : reciprocal affection : FONDNESS c : COSTLINESS

dearness allowance *n, India* : a bonus or pay increase to meet a rise in the cost of living

1**dearth** \ˈdərth, ˈdəth, ˈdəith\ *n* -S [ME *derthe,* fr. *dere* costly, dear + *-the* -th — more at DEAR] 1 *obs* : DEARNESS : highness of price 2 : scarcity that makes dear : WANT; *specif* : FAMINE ⟨there came a ~ over all the land of Egypt —Acts 7:11 (AV)⟩ 3 : lack of a present necessity : deficiency or inadequate supply of something (as news) or of some quality (as courage)

2**dearth** *vt* -ED/-ING/-S [ME *derthen,* fr. *derthe,* n.] *obs* : to make scarce, dear, or high-priced

deary *or* **dear·ie** \ˈdirē, -ri\ *n, pl* **dear·ies** [4*dear* + *-y, -ie*] : little dear : DARLING — often used as a term of address

deas \ˈdēs, -ā-,-e-\ *n* -ES [ME *deis, dees* raised table, raised platform — more at DAIS] *Scot* : BENCH, SETTLE; *esp* : one that can also be used as a table

de·ash \(ˈ)dē+\ *vt* [*de-* + *ash* (residue of combustion)] : to remove ash from

1**dea·sil** *also* **dei·seal** *or* **des·sil** \ˈdēzəl, ˈdesh(h)əl\ *adv* [Sc-

2**deasil** \"\ *n* -s : a charm performed by going three times about an object in the direction of the sun and sometimes carrying fire in the right hand

de·aspirate \(ˈ)dē+\ *vt* [*de-* + *aspirate*] : to pronounce without aspiration

de·assimilation \ˌdē+\ *n* [*de-* + *assimilation*] : CATABOLISM

death \ˈdeth\ *n, pl* **deaths** \-ths *sometimes* -thz\ [ME *deeth, deth,* fr. OE *dēath;* akin to OHG *tōd* death, ON *dauthi,* Goth *dauthus;* derivative fr. the root of ON *deyja* to die — more at DIE] 1 : the ending of all vital functions without possibility of recovery either in animals or plants or any parts of them : the end of life : the act, process, or fact of dying 2 a : the cause or occasion of loss of life ⟨drinking was the ~ of him⟩ : a deadly weapon or agency ⟨a cobra with ~ in its fangs⟩ b *archaic* : PLAGUE — see BLACK DEATH 3 *usu cap* : the bringer of death personified and conventionally represented as a skeleton with a scythe : the destroyer of life : GRIM REAPER 4 a : the state of being no longer alive ⟨in ~ as in life⟩ b : a joyless dull tasteless existence : the state of being without full possession or enjoyment of the intellectual or physical faculties ⟨the ~ in life of long years spent in a hospital bed⟩ c : cessation or absence of spiritual life variously conceived as alienation from God, deadness to the appeals of spiritual ideals, annihilation of the spirit as a result of sin, or irredeemable damnation — called also *spiritual death* ⟨to be carnally minded is ~ —Rom 8:6 (AV)⟩ 5 : the passing or destruction of something inanimate ⟨the ~ of the rackety old Third Avenue El —*Newsweek*⟩ or intangible ⟨the ~ of all his hopes⟩ ⟨the ~ of vaudeville⟩ : the process of such passing ⟨the ~ of the empire⟩ : EXTINCTION ⟨the ~ of a species⟩ 6 : CIVIL DEATH 7 : lethal or murderous violence : HOMICIDE ⟨merchants of ~⟩ ⟨a man of ~ —Francis Bacon⟩ 8 *Christian Science* : the lie of life in matter : that which is unreal and untrue : ILLUSION — **at death's door** : close to death : critically ill : in real or apparent danger of dying — **be death on** 1 : to have marked talent for accomplishing or dealing with ⟨his approach shots are erratic but he *is death on* putts⟩ 2 : to dislike or oppose vigorously ⟨the boss *is death on* latecomers⟩ — **in at the death** : present at the conclusion of an event — **to death** *adv* : to the last extremity ⟨tired *to death*⟩ : beyond endurance : EXCESSIVELY ⟨that kind of plot has been done *to death*⟩ — **to the death** 1 : to death 2 : as long as life lasts : to the end : without wavering or compromise ⟨war *to the death*⟩ ⟨follow our leader *to the death*⟩ ⟨hunting a criminal *to the death*⟩

death adder *n* : a highly venomous elapid snake (*Acanthophis antarcticus*) of the Australian region having a stout body and a spine on the end of the tail; *also* : any of several other related venomous snakes of Australia and Tasmania

death alder *n* [so called fr. its poisonous effect on cattle] : a spindle tree (*Euonymus europaeus*)

1**death angel** *n* : AZRAEL

2**death angel** *n* : DEATH CUP 1

death apple *n* : MANCHINEEL

deathbed \ˈ+,+\ *n* [ME *deeth bed,* fr. *deeth* death + *bed*] : the bed in which a person dies : the last hours of life ⟨~ baptism⟩

deathbed deed *n, early Scots law* : a deed made after contracting a sickness that ended in death within 60 days after the date of granting and without such convalescence as is indicated by the grantor going unsupported to kirk or market

death bell *n* : PASSING BELL

death benefit *n* : money payable to the beneficiary or estate of a deceased under a policy of life or accident insurance or a pension plan

death bill *n* : an ecclesiastical list of dead to be prayed for

deathblow \ˈ+,+\ *n* : a mortal blow ⟨he received his ~ in his first battle⟩ : a stroke or event that kills, destroys, or puts an end to

death board *n* : a plank on which a corpse is laid for sea burial

death camas *n* : any of several plants of the genus *Zigadenus* (as *Z. venenosus* and *Z. glaucus*) that cause poisoning of grazing animals in the western U.S.

death candle *n* : CORPSE CANDLE

death cell *n* : a prison cell for one awaiting execution

death certificate *n* : a certificate in which various information (as age, race, occupation) relating to a dead person is given and in which a physician certifies the cause of death

death chamber *n* : a room in which a person is dying or lies dead; *specif* : a place of execution within a prison

death-come-quickly \ˌ+(ˌ)+ˈ++\ *n, dial Eng* : HERB ROBERT

death cord *n* : a rope used for hanging a person — called also *death rope*

death cup *n* 1 *also* **death angel** : a very poisonous mushroom (*Amanita phalloides*) of wide distribution ranging in color from pure white (as usu. in the U.S.) to olive or yellow and having a prominent volva at the base 2 : the prominent cuplike enlargement at the base of the stipe in some fungi of the genus *Amanita* that is characteristic of poisonous forms though present also in some that are harmless

deathday \ˈ+,+\ *n* [ME *deethday,* fr. OE *dēathdæg,* fr. *dēath* death + *dæg* day — more at DAY] : the day of a person's death or its anniversary

death duty *n, chiefly Brit* : DEATH TAX

death fire *or* **death light** *n* : DEADLIGHT 3, CORPSE CANDLE

death·ful \ˈdethfəl\ *adj* [ME *deethful,* fr. *deeth* death + *-ful*] 1 *archaic* : full of or threatening death : DEADLY, MURDEROUS, DESTRUCTIVE, BLOODY 2 *archaic* : liable to undergo death : MORTAL 3 : like death : having the appearance of death : DEATHLY ⟨on his ~ face … a look of pain and baffled anger —Richard Hofstadter⟩ — **death·ful·ly** \-əlē\ *adv*

death herb *n* : BELLADONNA 1

death house *n* : the section of a prison for persons awaiting execution

death·in \ˈdethən\ *n* -s [prob. fr. *death* + *in*] 1 : a water hemlock (*Cicuta virosa*) of Europe 2 : a poisonous plant (*Oenanthe phellandrium*) closely related to the water hemlock

death instinct *n* : unconscious or biological tendencies toward self-destruction

death knell *n* 1 : PASSING BELL 2 : an action or event presaging death or destruction ⟨the coming of the power press was the *death knell* of the hand press⟩

death·less \ˈdethləs\ *adj* : not subject to death, destruction, or extinction : IMMORTAL, UNDYING, IMPERISHABLE ⟨~ fame⟩ ⟨~ poems⟩ — **death·less·ly** *adv* — **death·less·ness** *n* -ES

death·like \ˈ+,+\ *adj* : DEATHLY

death·li·ness \ˈdethlēnəs, -lin-\ *n* -ES : the quality or state of being deathly

death·ling \-liŋ\ *n* -s : one liable to death : MORTAL

1**death·ly** \ˈdethlē, -li\ *adj* [ME *dethlich* deadly, mortal, fr. OE *dēathlic* mortal, fr. *dēath* death + *-lic* -ly] 1 : DEADLY, FATAL, MORTAL, DESTRUCTIVE 2 : like or having the characteristics of death ⟨a ~ stillness⟩ 3 : of, relating to, or suggestive of death ⟨I marked each ~ change in him —Robert Browning⟩ **syn** see DEADLY

2**deathly** \"\ *adv* : in a way or to a degree resembling or approximating death ⟨~ sick⟩

death march *n* : a march (as of prisoners of war) in which those unable to go on are left to die as they fall

death mask *n* : a cast taken from the face of a dead person

death penny *n* 1 : a coin placed with a buried corpse as if to pay passage to the otherworld 2 : DEATH WEIGHT

death point *n* : a limit (as of degree of heat or cold) beyond which an organism or living protoplasm cannot survive

death rate *n* : the ratio between number of deaths and number of individuals in a specified population and period of time usu. expressed as number of deaths per hundred or per thousand population

death rattle *n* : a rattling or gurgling sound produced by air passing through mucus in the lungs and air passages of one dying

death rope *n* : DEATH CORD

death row *n* : a row of death cells

deaths *pl of* DEATH

death's-head \ˈdeths,hed\ *n* 1 : a human skull as the emblem of death : the head of Death 2 : a finger ring bearing the figure of a skull

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