

## Introduction

A dashboard is a collection of one or more widgets that allow you to compile and visualize the data that you want to communicate.

The basic premise is that you define which widgets appear in the dashboard, their design, how they are organized and the filtering of the data that appears.

## Overview

The best way to tell a story is with a picture and the dashboard is essentially a collage of those pictures. It allows you to direct the viewer's attention quickly and efficiently to what you want them to see, or what they decided they were interested in seeing.

Analyze allows you to create as many dashboards as you need without limitation. When you create a dashboard, you are the owner. Owners can share any dashboard they 'own' with other users. A dashboard can have one or multiple owners. Only owners can edit a dashboard – non-owners can only view the report.



## Plan It

To effectively create a dashboard, the first step is to know what to show. The best way to know is have a discussion with the viewer. Your data use plan should be an intricate part of this discussion because after all, that's the roadmap of data communication.

Find out what they want to measure, what KPI's they're required to track and determine their interests. From that point you can get an idea of how many dashboards they need and how they might be setup. Remember that every audience is different.

## Create It

Here are some points to remember:

1. Create folders and names that are intuitive and make things easy to find. Once a dashboard is created, if you find that the next one you need to create is similar, rather than recreating it, copy it and modify it to show what's required. This saves time and promotes efficiency.
2. Sometimes less is more. A dashboard is like driving into an intersection. If the intersection has 15 signs, which do you read first? Does it clutter it to the point that nothing is read and the intent is totally missed? If I have to spend more time trying to figure out what I should be looking at, I'm probably going to move on to something easier.
3. Use labeling and naming conventions that make sense. It should be relevant to the user with the most important data points positioned at the top. Increase the size if necessary.
4. When evaluating required dashboard content, try to get an idea of the colors that work



best for the viewer. Some may have a preference because they're used to it, although others may be colorblind and have great difficulty seeing pastels or solids.

5. Think of a directory tree when creating a dashboard. At the top of the tree is the concept and add a few branches going down that offers some supporting information. Our dashboards incorporate a drill down feature so even though it may not be visible in this tree on the outside, using the right mouse button in certain areas provides access to "drill" which allows you to select a deeper variable to see what the origin of the data is.
6. Avoid adding too many variables to a widget. If it's easy to read to you, chances are that you're going to be able to clearly explain it to the viewer. Each of the charts is editable by clicking on the pencil icon. This avoids having to recreate it.



## Review and Confirm

Once you've created the dashboard, sit down with the viewer and review it with them to make sure (1) it's what they wanted and (2) it's presented in such a way that it's clear and concise. This is all about understanding and agreement. You understand what the user wants, it's created and then we all agree that it makes sense and meets expectations.

This is your opportunity to adjust it and make any required corrections. There are nearly 20 different individual visuals that can be used to tell a story take the "figuring" out of it. This makes more time for action in order to drive improvement within the process. Consider reviewing PSC-17018 entitled Dashboard Design Best Practices for more helpful information.