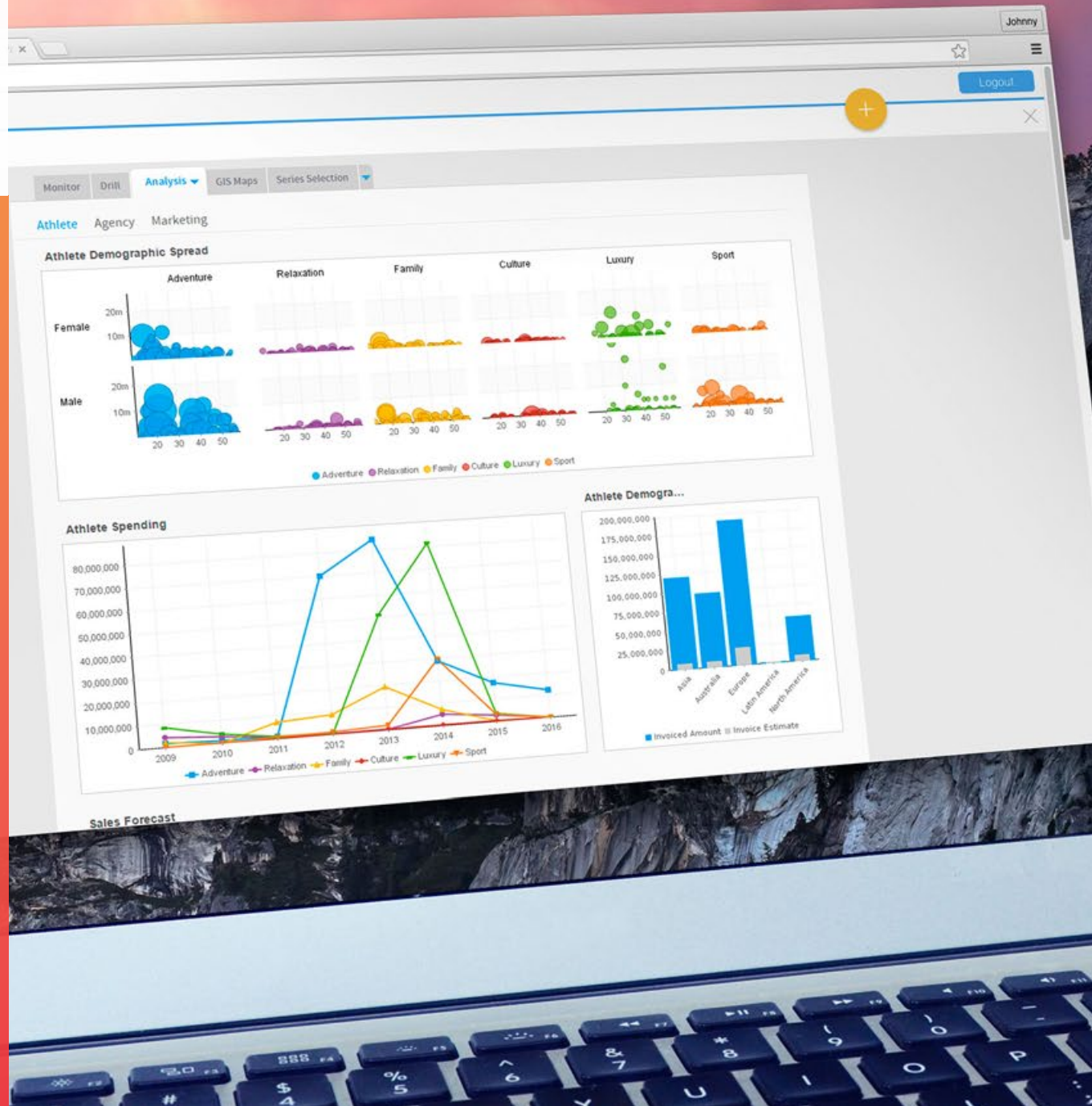




Dashboard best practices guide

yellowfinbi.com



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Dashboard Best Practices

Dashboards are the perfect way to monitor your business and get rapid answers.

This guide will walk you through the best practices for dashboards design. Helping you deliver personalized and interactive dashboards that your users will love.

What is a dashboard?

A dashboard visually displays multiple reports on a single page. Allowing you to monitor your most important metrics at a glance.

Why Dashboards?



FASTER INSIGHTS

All your metrics in one place.



BETTER DECISIONS

See a summarized view of the world.



STRATEGIC FOCUS

Gets everyone on the same page.



MONITOR BUSINESS SUCCESS

Track progress over time.

Propose

BEST PRACTICE #1

Every dashboard should always be designed for a specific purpose, with a specific audience in mind.

Knowing your audience and building dashboards that help them succeed is what it's all about.

Ask yourself...

- Who exactly is my dashboard for?
- How will this dashboard help people do their job?
- What is the central thought-line of my dashboard story?

Who is your intended audience?

If you know your question, and have the right data available, there is a perfect dashboard for you.



EXECUTIVES



FINANCE



SALES



MARKETING



OPERATIONS



SERVICES

Summarize

BEST PRACTICE #2

Every dashboard should provide an overview of a single subject area.

Avoid the temptation to show people everything at once. People don't need to see all metrics on a single tab, and too much data can be overwhelming and confuse the story of your dashboard.

Provide a summarized overview that allows people to find and monitor information at a glance. Then allow users to drill or zoom from summary to detail once they understand the big picture.

Focus on a single subject area per tab



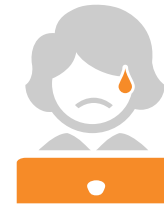
GLOBAL VIEW

For important metrics use KPIs and summary reports.



SUMMARY TO DETAIL

Drill to detail.



DON'T OVERWHELM

No data puking.

Relevance

BEST PRACTICE #3

The most valuable dashboards provide highly relevant insights to your audience. Insights that help people take action towards a specific business goal.

You can measure the relevance of a dashboard by how frequently it is used. Keep churning your dashboard content as your business needs evolve. You can always ask better questions.

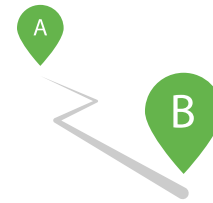
“Perfection is achieved not when there is nothing else to add, but when there is nothing left to take away.” - Antoine de Saint-Exupery

Are dashboard insights relevant to your audience?



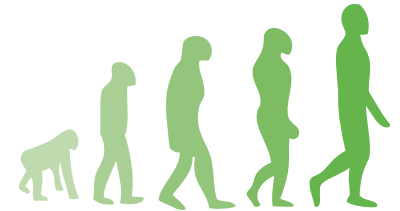
ACTIONABLE

Focus attention on actionable insights.



CONTEXTUAL

Match your metrics to business goals.



EVOLVING

Keep updating as your business evolve.

Functionality

BEST PRACTICE #4

Deciding what dashboard functionality to use depends on your audience and purpose.

Make sure you understand the three key different types of dashboards use cases so you know what interactivity and data access will be best for your users.

What is the nature of your dashboard?



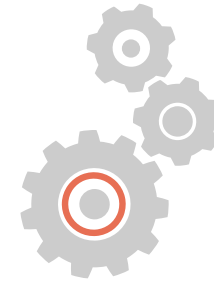
STRATEGIC

Drive organizational strategy.



ANALYTICAL

Discover valuable insights.

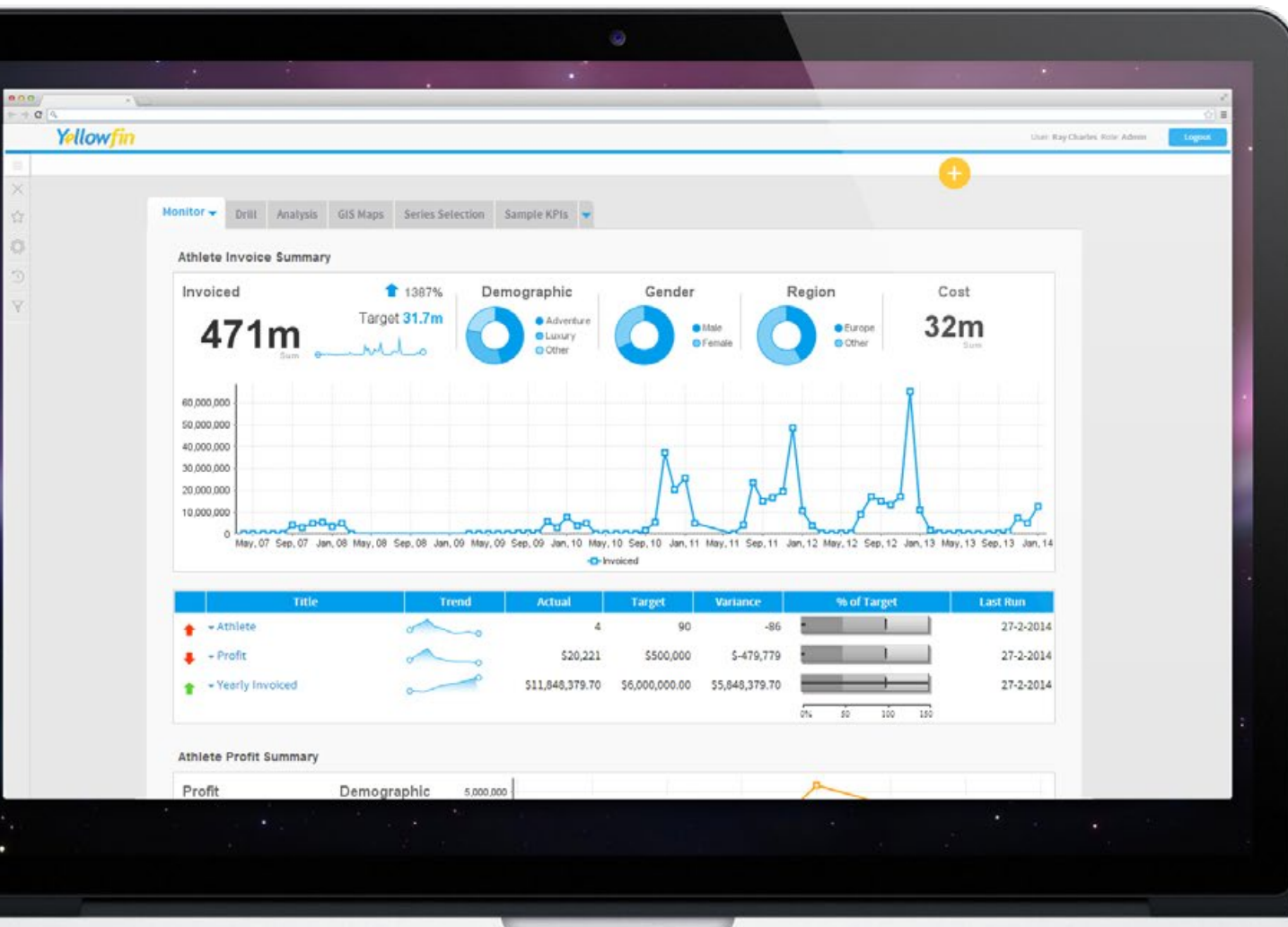


OPERATIONAL

Deliver operational excellence.

Strategic Dashboards

Help your executive team keep your business on track with strategic dashboards that monitor what's important. See all your different data sources on a single page with high level summary reports and KPIs. Then easily drill into the detail to quickly answer your questions and act fast.



PURPOSE

Measure high level performance with a global view of the business.

DECISION HORIZON

Long term decisions.

DATA

Multiple data sets on a single dashboard.

FUNCTIONALITY

KPI and summary reports drill through to detailed reports

Analytical Dashboards

Analytical dashboards are highly interactive and link all your data together. Make it easy for anyone to explore data discover valuable insights to optimize performance. Experience truly interactive data exploration and uncover fresh insights with filters, brushing, series selection, drills and more.



PURPOSE

Discover valuable insights fast.

Explore specific topics and understand what, why, when and how.

DECISION HORIZON

Medium term decisions.

DATA

All data linked.

Query speed matters.

FUNCTIONALITY

Highly interactive filters, series selection, brushing, drills.

Operational Dashboards

Become a data-driven organization by empowering your people to independently access and understand personalized real-time information. Always know when to take action with proactive alerts that notify you of important changes in your data. Help everybody in your organization make better day-to-day decisions.



PURPOSE

Deliver operational excellence.

For monitoring and immediate decision making.

DECISION HORIZON

Short term decisions.

DATA

Live data or very regular updates.

FUNCTIONALITY

Limited interactions

(less time analyzing the better)

Proactive Alerts

Can embed into tools people use everyday

Visual

BEST PRACTICE #5

Dashboards visually display multiple reports on a single page. Choosing the right chart type for each report will help you find and tell the story in your data. The appropriate chart will reveal patterns and trends, so you instantly understand what it means.

Ask yourself...

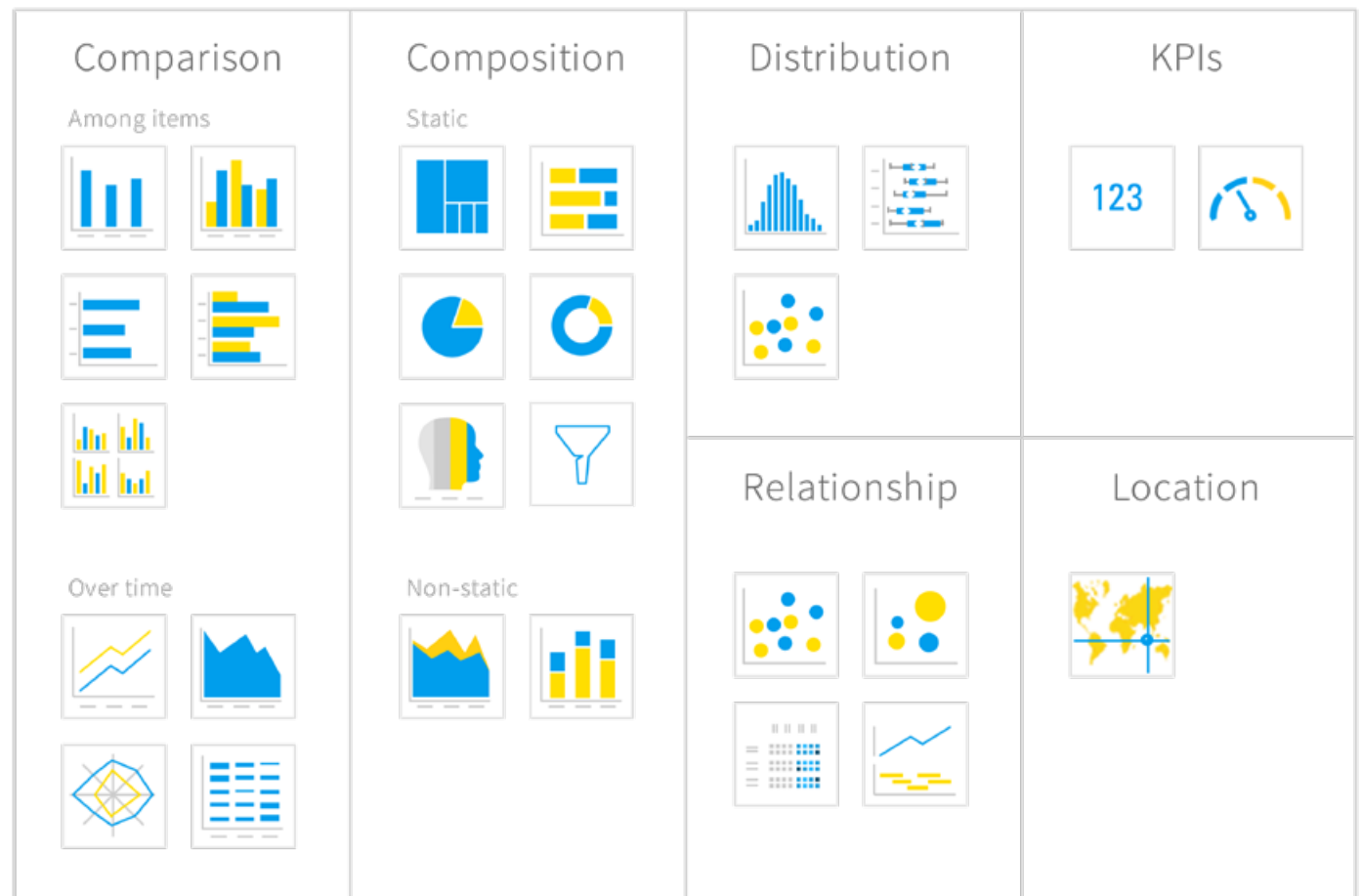
- What would you like the report to show? (e.g. comparison, composition, distribution, relationship, KPI, location)
- Does the visualization allow people to understand important metrics at a glance?

Need more help?

Check out Yellowfin's Data Visualization best practice whitepaper and find out the perfect chart for your data.

What would you like to show?

Choose the chart type that best fits your data.

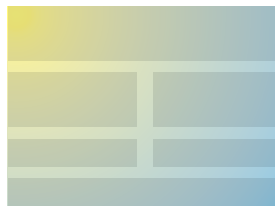


Layout

BEST PRACTICE #6

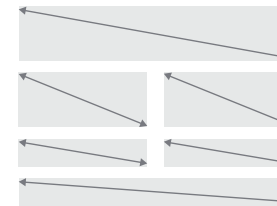
How you organize a dashboard can help highlight important information or tell a specific story. Your dashboard layout should be determined by the importance of your reports and an understanding of your intended audience.

Design layout by the importance of each report



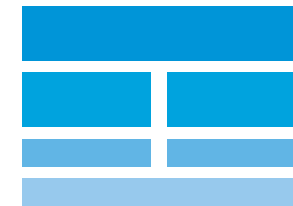
GRADUAL REVEAL

Place reports in an order that tell a story.



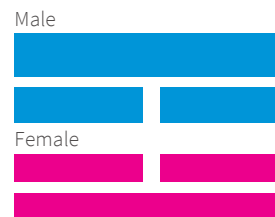
POSITION

People read from left to right, top to bottom.



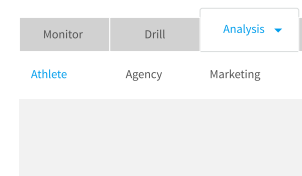
SIZE

Give the most important reports more space.



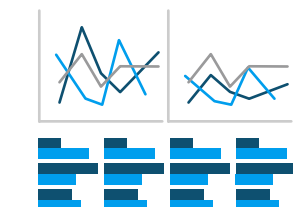
GROUP DATA

Keep related reports together (e.g. demographic & gender).



MINIMIZE SCROLLING

Consider using sub-tabs or associated reports instead.



DON'T SQUISH

Ensure each report has enough space to be readable.

Clarity

BEST PRACTICE #7

Don't let people misinterpret your charts. Make your charts easy to understand by telling people exactly what they represent.

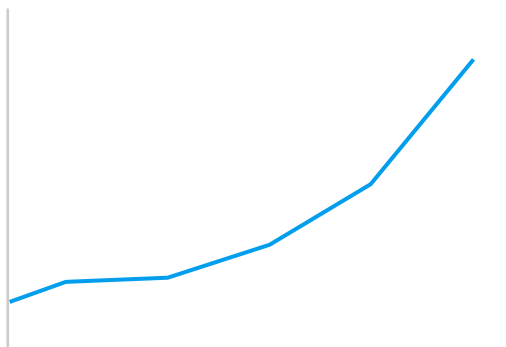
Chart Titles

Use Chart Titles frame the story and purpose of what your charts mean.

Descriptions

Use descriptions to add additional context such as how to use the the chart, who created the content and where the data comes from.

Make it easy for users to understand





TITLES

Tell people what your dashboard and charts represents.

Series Selection ×

Explore a single metric at a time, across multiple reports, each using different categorical splits.

 Created By **Teresa**
26 Mar 2016

Used By
 +11 Others

DESCRIPTION

Add additional context such as where the data comes from.

Consistency

BEST PRACTICE #8

One of the biggest challenges is how to ensure different people all have the same understanding of the data. Building consistency into your dashboards, assists in avoiding confusion in meaning and definition. It also makes dashboards more intuitive and faster to consume.

If you have multiple people building reports, administrators can leverage a View or Metadata layer to ensure consistent names, calculations and colors throughout all reports and dashboards of your deployment by giving users less to remember and less to learn.

Design layout by the importance of each report

Metrics

- Σ Invoice
- Σ Sales
- Σ Revenue

NAMES

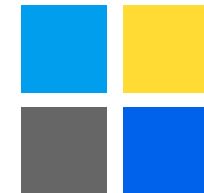
Use consistent naming conventions (Sales, revenue, invoice)

● Gross Profit Margin %

Gross Profit Margin %
The gross profit margin expresses your profits as a percentage of the total sales revenues generated.

CALCULATIONS

Use consistent metrics throughout the organization.



COLORS

Use consistent colors to help users form associations with data.

Trust

BEST PRACTICE #9

Is your data trusted by its users?

Poor data quality is one of the top reasons why BI projects fail. When users stop trusting the data, they eventually stop using your dashboard.

Ensuring data quality is a lifetime task, and trust can be hard to repair when broken. Yellowfin Tasks gives business users a feedback loop to report data quality issues directly to the data steward. Ensuring data issues are quickly rectified enabling a greater level of trust throughout your BI deployment.

Data quality matters



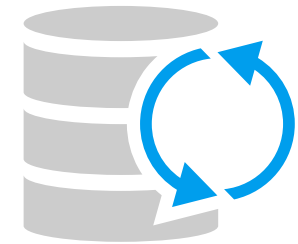
DATA AVAILABILITY

What data do you need?



DATA QUALITY

Is the data trusted?

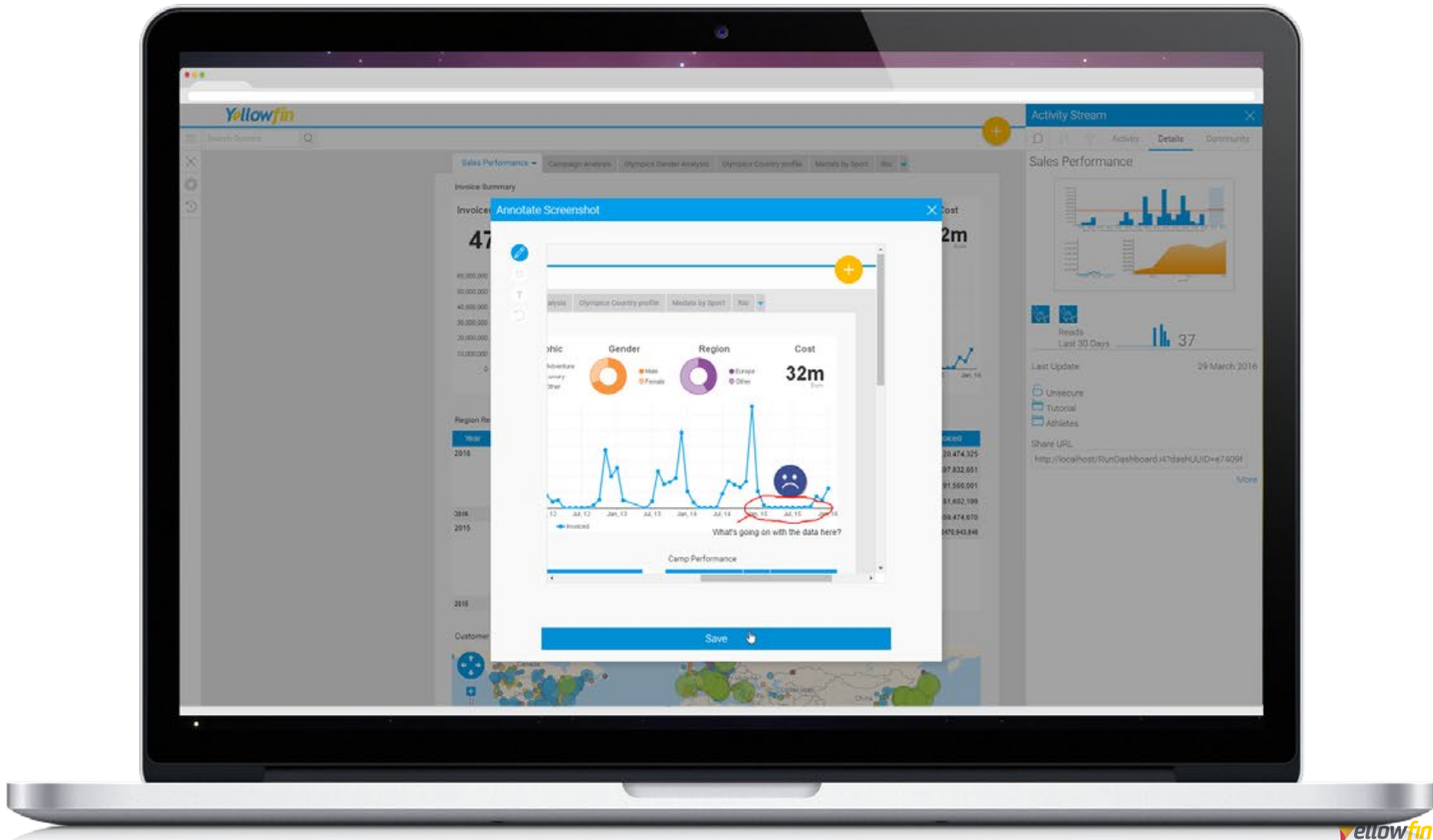


REFRESH

How often does the data need refreshing?

Tasks

When users know your data is wrong, they stop using your dashboards. Trust in your data is critical. By creating a feedback loop that empowers your users to flag data quality issues with in-platform screenshots and annotations, you ensure rapid data quality resolution and your dashboards become more trusted than ever.



Accessible

BEST PRACTICE #10

Dashboards are a powerful way for people to monitor important metrics at a glance. Unfortunately, not every decision maker spends their day using their business intelligence platform.

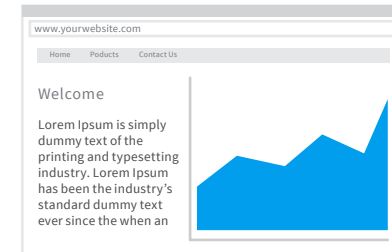
Maximize the value of your dashboards by delivering insights to decision-makers wherever they make decisions.

Data is more valuable when shared



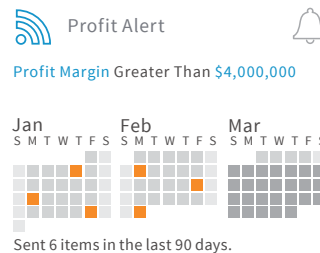
MOBILE

Create once then consume on any platform, any device.



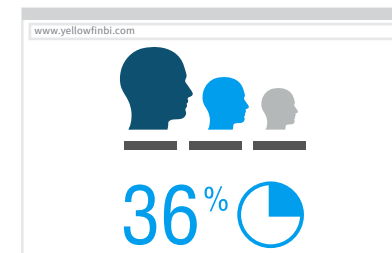
EMBED

Embed insights into the applications people use everyday.



BROADCAST

Tell people when to take action with periodic reports and data-driven alerts.



INFOGRAPHICS

Make complex information eye catching, shareable and easily digestible.



About Yellowfin

Yellowfin is a Business Intelligence platform that makes finding and sharing insights easy. Transform your data into rich visualizations and interactive dashboards. Answer your organization's most important questions. Then share, collaborate and make better data-driven decisions.

For more information, visit www.yellowfinbi.com

