



Dashboards: Business Intelligence At A Glance

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I have spent a lot of time looking at dashboards lately. See, I've been test driving new cars to see what might replace my 10-year old van now that carpool days are behind me. Car makers give us dashboards in a variety of colors and layouts, and each seems to have one or two items they give more prominence. The ones I like most show what's most important to me. Knowing my RPMs at 70 mph might be cool, but watching that gauge tell me I can go another 100 miles before I'm out of gas ... or that I'm heading north when I was supposed to be going south, has more immediate benefit to me.

As different as they might be from model to model, you wouldn't drive a car without a dashboard. It would be like driving in the dark with no guidance. And so it is with the other dashboards in your life. How would you follow your retirement investments if you couldn't see the dashboard of your holdings, recent activity and year-to-date when you log in to check on your 401(k)?

In business, dashboards are emerging as the new face of Business Intelligence. Dashboards let us consolidate information about the health of our business, our department, our branch or more, in a graphical format that is concise and easy to read. They also come in different colors and shapes, with names like Performance dashboard, Executive dashboard, Balanced Scorecard, KPI metric summary or Corporate dashboard. The goal? To showcase the facts in a way that empowers the user to make more intelligent decisions based on better information.

If you have dashboards at work, it is important that the information be meaningful. A dashboard used by upper management, for example, might have a top-level view of key metrics

such as cash balance, income period to date and year to date, comparatives to last year, top 10 customers, or top 10 popular

WANT TO LEARN MORE ABOUT DASHBOARDS? HERE ARE SOME GREAT PLACES TO START:

- ▶ **Microsoft SharePoint Dashboards** — <http://sharepoint.microsoft.com/Blogs/GetThePoint/Lists/Posts/Post.aspx?ID=367>
- ▶ **SAP Crystal Dashboard Design (formerly Excelsius); it sits on Excel** — www.sap.com/solutions/sap-crystal-solutions/dashboards-visualization/sapcrystaldashboard-starter/index.epx
- ▶ **Microsoft Application Virtualization Dashboard** — <http://technet.microsoft.com/en-us/library/ff424455.aspx>
- ▶ **DataSelf – works with several ERP systems** — www.dataself.com
- ▶ **ERP imbedded; Microsoft Dynamics Business Portal** — www.microsoft.com/downloads/en/details.aspx?FamilyID=172D04F0-A0FF-421B-9907-2DE4E8EB87F8&displaylang=en
- ▶ **ERP imbedded – MAS 90/200/500 Business Insights Dashboard and MAS Intelligence** — www.sagemas.com/assets/SageMAS/pdf/MAS_90_200_Business_Insights_Spec.pdf
- ▶ **InfoCaptor dashboard tool** — www.infocaptor.com
- ▶ **Corda Centerview dashboard tool** — www.corda.com/dashboard-software.php
- ▶ **Dundas dashboard tool** — www.dundas.com
- ▶ **Dashboards by Example blog** — www.dashboardsbyexample.com

sales items. On the other hand, a dashboard for the warehouse manager might show items where stock is low, where stock isn't moving or when the next orders are scheduled to arrive at the loading dock.

Continued on page 2

Dashboards: Business Intelligence At A Glance

Continued from front

There is a technology to dashboard design, and to best take advantage of that technology you have to become a student of dashboards. Here are some tips that should help:

- ▶ A student studies, so you should study other dashboards to help you better prepare to design your own in order to reflect needed information for both your company and the individual users. Think of how you might watch a decorating show to get ideas for your next home renovation. Get ideas from what others have done with dashboards to identify what data is most important. Then sketch it out before it goes off to design
- ▶ Go for graphical. The easiest way to grasp the meaning of a lot of data quickly is through graphs. In an accounting world, this also helps non-accountants better understand vital information, such as sales per employee.
- ▶ Go for grid design. It is the standard for most dashboards — a template that allows you to control what information shows up in each section.
- ▶ The most important information goes on top of the screen so it easy to see, such as Key Performance Indicators (KPIs).
- ▶ Lay out information in a logical fashion and group related items through the use of colors, labels and borders. This enables an accounting manager to see all customer stats in one grid section — top customers and account aging — while personnel information is in a separate section.
- ▶ Go for interactive, where appropriate. This could be as basic as the ability to drill down into an aging report to view unpaid invoices, or the ability to move a gauge on the dashboard to see “what if” analysis, such as “What’s the impact on the bottom line if I sell 100 more?”
- ▶ If you use Microsoft Excel in the development of your dashboard, be sure to take advantage of the multiple tabs to segregate data views.
- ▶ Make your dashboards readable. Color in graphics can improve readability, as does highlighting and bolding. Be careful about squeezing in more than can be easily read.

Dashboards can have some real high-level differences. A SharePoint dashboard can be set up to provide a more “global

view” of your world. It could incorporate information that is broad reaching, such as company announcements and calendars everyone sees as well as personal data on open customer orders if you are in customer services, a list of reports that you look at regularly, some Word templates you frequently use, and personal Microsoft Outlook information including a shared calendar.

The beauty of dashboards is that they can and should be individualized. A dashboard can be specific to one person and focus on the individual pieces of data they need to do their job. A dashboard for a sales manager, for example, might show each sales rep and their stats for this period, a comparison to last period and year to date. It might show potential sales are in the pipeline, what sales closed this period and the amounts.

We use dashboards in our consulting department — one created in a combination of Crystal using KnowledgeSync. Management’s view shows team information, and the consultant’s view is personalized to the specific individual. Consultants are like other personal service firms, such as accountants and lawyers, who need to know the work they have done for the period, what type of work was done, and how much was billable versus education or admin. Both views let us compare this month to last month and recognize the top clients by activity. For companies working projects, the dashboard should show project status, highlighting those that are over budget or at risk for missing a deadline.

Some specific software tools are also dashboards. The Microsoft Application Virtualization Dashboard, for example, measures information on your virtual servers such as the top applications used, the top users, which applications are not used (so they can be decommissioned) and what the total system utilization is.

The bottom line on dashboards is that they need to be meaningful to the user. The car companies have spent a lot of money on dashboard design and features to be sure they connect with potential buyers. Be sure your users can easily navigate with their dashboards, and we can all become better drivers in today’s more challenging business world. ■