

# **Top 10 Tips Designing and Developing Executive Dashboards with Web Analysis**

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This will be an exciting session for conference attendees who are: 1) Being asked to design and create an Executive Dashboard using Analyzer, 2) Currently maintaining an Executive Dashboard in Web Analysis, 3) Thinking about utilizing Web Analysis in creating an Executive Dashboard.

This session will be a “hands on” interactive journey of the top 10 tips in the design and development of Executive Dashboards from a noted industry technical consultant who has extensive experience in creating Executive Dashboards using Web Analysis across a variety of industries.

## **Creation and formatting of a “Style Guide” from which all system objects are created**

A Style Guide represents written guidelines for all Web Analysis developers to follow. Typically, all involved parties in the deliverable get together and come to a meeting of the minds as to the look and feel of the deliverable. A useful outline for this document is as follows:

1. Objectives
2. Window
3. Page Banner
4. Navigation
5. Date Stamp
6. Version Control
7. Body of Data
  - o Header
  - o Navigation
  - o Object Size / Placement

## **Designing a background template as the basis for all Web Analysis “Documents”**

A template represents the best approach to maintaining a clear and consistent deliverable. The source of this can be found from the companies existing web site or a unique design. You need to be aware that a company website is typically marketing oriented, whereas an Executive Dashboard is more financial related. Hence, you must be more aware the end user is going to be studying numbers, size does matter.

## **Deciding on a Navigational Approach**

Investigating the three navigational design options available and what works best under differing sets of circumstances. Typically, they are three types: 1) Enterprise, 2) Hierarchical and 3) Single Pass. The Enterprise design is typically like SQL Server Enterprise Manager or Hyperion Essbase Application Services. The navigation flow can be found on the left and the data display on the right. Hierarchical is typically a unique user design, which represents a logic business, process or data flow. For example, you

may design a “Main Menu” based upon “Income Statement”, “Balance Sheet”, “Cash Flow”, “KPI’s” and “Metrics”. Single Pass is a left to right set of documents that guide the user to an end.

## **Create a “Home Page” Start Point**

In order to guide the user from the Hyperion logon screen to the Executive Dashboard documents, you will want to turn off all tabs and initiate a home page setup. It is best to create a single report or folder group to point to at start up.

## **Navigating with the “Open Report” Service Object**

Utilizing the “Open Document” Service Object, you can create a unique navigational approach to your Executive Dashboard. Once created you can right mouse on the Object and create a button that meets your Style Guide and background template.

## **Grid Object Data Displays**

Grid objects typically represent the amounts to be displayed for the user. Hence, with all of the hype about templates, home pages and navigation aside, you need to pay particular attention to the size, font, background and foreground color of the data being displayed. The font is typically defined in the Style Guide creation process, whereas the size will typically be defined and redefined based upon demonstration and use by the user community. Typically, the size of the font is proportional to the mean age of the user community.

## **Graph Objects Data Displays**

There are three types of graph objects available: 1) Line, 2) Bar and 3) Pie. The Line graph is best used for comparison trends. The Bar is best used for time-phased comparison trends and the Pie is best for a single point in time comparison. Pie charts are typically charged events driven by Tab, Drop Down or Radio Buttons.

## **Best Use of the Drop Down Object**

The Drop Down object is best used with the sparse Dimensions that have multiple members. Drop Downs can be used to drive a grid, graph or both. A singular Drop Down is used for each Dimension and multiple Drop Downs can be used to drive a single grid and or graph.

## **Best Use of the Radio Button / Check Box Objects**

Radio Buttons are best used in small amounts and are best used as to define the columns and or rows of the grid objects. These real directly to the contents of the Measures / Accounts Dimension and are provided as a Radio Button. Check Boxes typically relate to trend comparisons for Grids and Graphs, something like the comparison of Versions.

## **Print Options**

The Print Object allows the user to print a page, in a “Print Screen” format or print a high lighted object. Sizing can be performed as well as exporting out to Excel for further manipulation of the data.