



Dashboard Best Practices

PRESENTED BY:

Mike Waters

Hi, I'm Mike Waters.

- ▶ Specialist in reporting and business intelligence
- ▶ 20 years working with rental software

What are we going to cover ?

- ▶ Your audience
- ▶ Types of dashboard
- ▶ Building your dashboard
- ▶ Embedding your dashboard
- ▶ What's in the pipeline
- ▶ Q&A



**Think about your
audience**



Stock Name	Price	Change	% Change	Volume
MSFT	28.73	+0.12	(0.42%)	281,338
BIDU	98.70	+1.33	(1.37%)	3,338
TWX	21.13	-0.08	(-0.38%)	81.02B
LOOK	4.24	0.00	(0.00%)	97.53M
	37.85	+0.46	(1.23%)	109.76B
				48.05B

[MSFT](#)
[BIDU](#)
[TWX](#)
[LOOK](#)

Re: CEO's name mis
 Annual Report?
 slmo..@gmail.com
 In the annual repo
 Board Member (a
[More discussion](#)

The CFO?

Branch Managers?





Workshop / Service Teams?



**Different audiences want
different information at
different levels.**

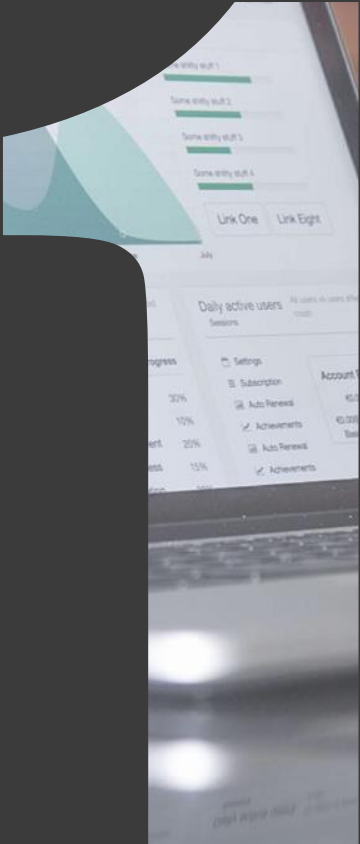


**Avoid the
“one size fits
no one”
trap**



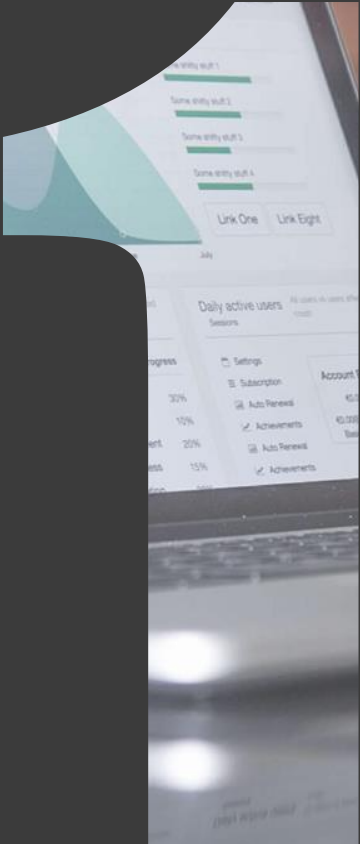


Types of Dashboards



Strategic/Executive

- ▶ High-level bird's eye view
- ▶ Monitoring KPIs
- ▶ Data will be periodic and highly summarized



Strategic/Executive examples

- ▶ Periodic: This year / last year or this month / last month
- ▶ Costs
- ▶ Revenues
- ▶ Utilisation (\$ or %)
- ▶ Fleet values and depreciation



Operational

- ▶ Fine grain detail
- ▶ Used for day to day running of the business
- ▶ Can be “disposable” – only used for a short-term project

A large, stylized number '2' is positioned on the left side of the slide. The background of the number is a dark grey gradient. Inside the upper loop of the '2', there is a circular inset showing a smartphone screen. The screen displays various analytics: at the top, two numbers '2,315' and '7,325' with small text below them; a bar chart with three bars of increasing height; and a table with columns for 'Daily active users', 'Sessions', and 'Account Balance'. The table has rows for 'Subscription', 'Auto Renewal', and 'Achievements', each with a percentage and a dollar amount.

Operational examples

- ▶ Orders due today not yet filled
- ▶ Breakdowns not responded to within 1 hour
- ▶ Tomorrow's equipment shortfalls
- ▶ Measure take up of new processes or applications
- ▶ Activity by user



Analytical

- ▶ Operational or strategic
- ▶ Allows the users to drill down into data
- ▶ Can be designed to prompt questions not give answers

Who wants which style ?



Strategic
High-level view

- ▶ CFO
- ▶ Depot Manager



Operational
Fine grain detail

- ▶ Depot Manager
- ▶ Workshop & Services Team



Analytical
Both worlds

- ▶ CFO
- ▶ Depot Manager



Building Your Dashboard

Total Fleet Visibility

[Permissions](#)
[Change owner](#)
[Package](#)
[Copy](#)
[Share](#)

Qty On Rent

911

Qty Ready to Rent

44,074

Qty in Repair

29

Value on Rent

\$1,474,889

Value Ready to Rent

\$17,941,775

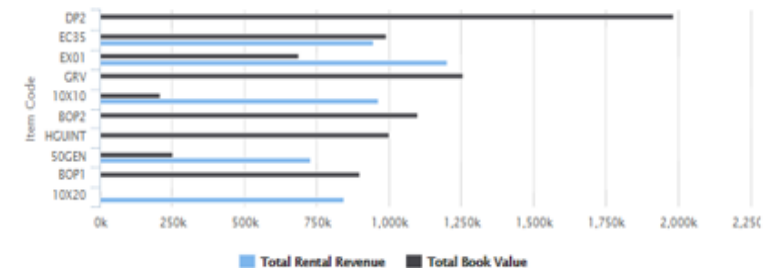
Value in Repair

\$3,350

Total Qty of Assets by State



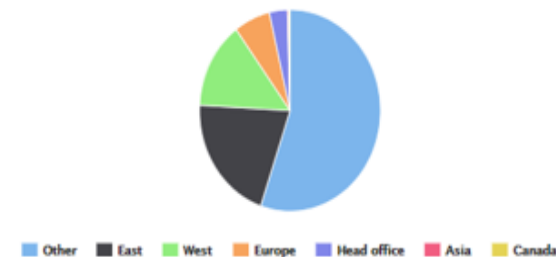
Top 10 Categories by Revenue



Qty in Transit by Sending Branch

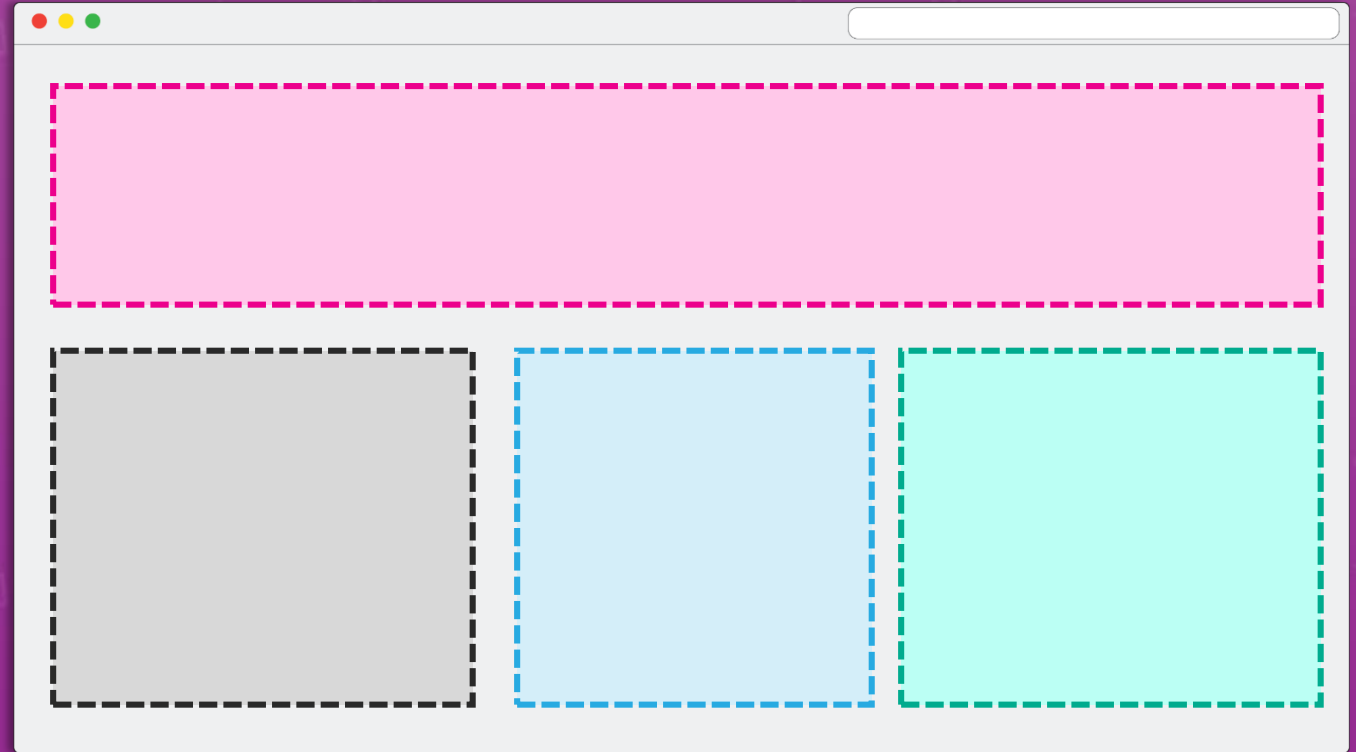


Value by Region



Grouping

- ▶ Divide the page into 3 or 4 sections
- ▶ Group like data together
 - ▶ Quantities
 - ▶ Revenues
 - ▶ Charts and Maps
 - ▶ Branches



Filtering: Make the data relevant



- ▶ Include filters to limit results
- ▶ Filters can be user driven or automatic

Refreshing Data – Operational Dashboards

- ▶ Avoid large data tables where possible
- ▶ Use charts, aggregates, maps to convey ideas and trends
- ▶ Present headlines, let the user drill down for details
- ▶ Reports exceptions – make your outliers stand out
- ▶ Less is always more

Refreshing Data – Operational Dashboards

- ▶ Real time / near real time
- ▶ Fewer queries
- ▶ Lighter weight queries
- ▶ Focused queries
- ▶ Think about how many users x how many times a day

Refreshing Data - Strategic Dashboards

- ▶ Snap shot information – built overnight
- ▶ More queries
- ▶ More complex queries
- ▶ Queries built over longer time frames (this year v last year)
- ▶ Other data sources



Building a Dashboard in Reporter



Embedding Dashboards

Embedding into Envision UI

- ▶ Users can embed dashboards on the screens they use every day
- ▶ Contextual filters can be passed to the dashboard to filter data to match the screen

Embedding into RentalResult

- ▶ Control Centers (Sales, Purchase, Rental)
- ▶ Order Entry (Hire, Sales, Purchase, Re-Rent)
- ▶ Inquiries (Document, Item)
- ▶ Contextual filters: Filter dashboards based on the application

Embedding into Job Site Portal

- ▶ Embed reports & dashboards into Job Site Portal
- ▶ Self-service reporting for your customers or job sites
- ▶ Data secured based on portal user security



Reporter 5

Reporter 5

- ▶ Rebuilt from the ground up -faster, better looking
- ▶ Google maps integration
- ▶ New dashboard features – including comparison boards
- ▶ Data cleansing and transformation
- ▶ Allow user to explore data with data sets
- ▶ API to allow integration into other applications / websites



Thank You
Any Questions?