

Does Your Company Really Understand Business Intelligence From a Report?

After some trial and error, we think we have come to terms with the fact that some people just don't understand what makes a flexible and usable dashboard or scorecard. When most of us think about dashboards, we think of visuals like trending, with drill-thru capabilities built upon thresholds, and key performance indicators (KPIs). From our experience, people want to see the health of their business or department from an environment that could resemble the cockpit of an airplane, or the 'dashboard' (get it) of a car. That said, why would your customer be demanding a dashboard that looks more like your typical report? Maybe it is like many reports just landing on one page --- THE PAGE.

In a recent prototyping session as a debate broke out surrounding what should be on the "dashboard," it became quickly apparent that the business owners liked to use the term dashboard, but really did not have any idea of the definition. The debate went on and side conversations began as the meeting almost completely derailed. Behind me, one wise attendee whispered to his co-worker, "A dashboard should tell a story..." thus largely summing up the true definition of a dashboard in its entirety. Unfortunately, the juicy little knowledge nugget went largely unnoticed and the main business owner got exactly what they wanted not a dashboard, but a whole bunch of reports crammed on "THE PAGE" at about 5pt font.

Lesson learned: Be careful when interrupting terms used by those who are infamously guilty of propagating industry buzz words. Otherwise, run the risk of wasting a lot of time and upsetting your business sponsors.

A Dashboard tells a story

Now, let's examine a dashboard, and who would likely be interested in viewing their data in this fashion verses those who are more likely to be satisfied with tabular reports. A dashboard tells a story which is continually being written, this story may be told over a long time period, it may be a story about the times of old or it might be a tale projecting how one wishes to see the world in contrast to how it currently is constructed. Sometimes, the database housing the dashboard data is real-time, sometimes it is more static, and sometimes it is proprietary. But, the main reason to have a dashboard is to provide a view into our story and establish indicators, alerts, or predictors based on an event, exception, or threshold in the data. Thus, allowing us to begin to re-write and make necessary adjusts to our story.

The pros and cons of each reporting environment are listed below. Along, with that is the type of user that may lean one way or the other.

Tabular/Textual Reports:

1. Pros
 - a. You get to see the numbers first, and it is what most users see NOW and are used to in their reporting environments
 - b. Doesn't require a complex design based on business requirements to establish events, thresholds, and indicators

- c. Many times users can decipher calculations based on the data provided in the report
- 2. Cons
 - a. Lack of Graphics prevents users from quickly identified data oddities
 - b. Not Easily Interpreted
 - c. Provides more data than many users may wish to know
- 3. The type of business users who likes textual based reports are usually in finance, accounting or operations. It encompasses industries like insurance, pharmaceuticals, finance, etc. Actually, most any company with a finance department. Seems the spreadsheet look and feel is what gives them a warm and fuzzy feeling.

Dashboards driven by graphics:

- 1. Pros
 - a. You can pinpoint an issue almost immediately upon viewing the graphs, and drill to the detail
 - b. They have color, and graphics
 - c. Depicts the indicators the way the business customer wants to see them, and shows the detail information
 - d. Easier to use, and create in prototyping sessions with the business user
- 2. Cons
 - a. You might have to click a few time to get to the detail data
 - b. You don't see the numbers first, you see graphics and charts
 - c. Requires design based on user requirements to establish events, thresholds, and indicators
 - d. Beauty is in the eye of the beholder – Graphical design can often be time consuming
- 3. Type of users who love dashboards are usually fast moving executives, who really only want to see the good news, and the bad news. Thus said, they also want the ability to drill down into any indicator that denotes failure or success, and find the root of the issue.

Summary

Well, being faced with getting the project out the door, and on its way to the business user, may play a big part on how much change can be accomplished in a short period of time. Textual reporting environments have worked for many years. Most business users probably think textually when talking about reporting, not necessarily graphical. If we could prototype, textual information in a graphical format, would they choose the graphics?

Maybe we should just give the user the option of picking the way they want to see the data – graphs or text. Oh, darn is that another click?

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