



# How to build better dashboards in 8 easy steps

Using Intuitive Dashboards V5

For further information

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# How to build better dashboards in 8 easy steps

## Using Intuitive Business Intelligence Dashboards V5

More and more businesses in 2019 are getting inspired to revamp their business intelligence (BI) strategy. While prompt and up-to-date insights are always necessary, you can take forward thinking to the next level with the new Intuitive Business Intelligence (IBI) software. Find our eight tips on bringing life to your dashboards, improving customer experience and engaging employees more. In short, how to get more value from your IBI implementation in 2019.

### 1. Tell more data stories and answer varied questions with pivots

Feeling overwhelmed with data from multiple accounts, subsidiaries or suppliers?

Extract the significance from larger datasets and make the complex simple by utilising our new pivoting features. You can also choose to show the pivots as a bar chart or a grid to make it as readable as possible.

Summarise your data into groups and categories and uncover new perspectives to your analyses! Getting lost among multiple grids and graphics on a dashboard now belongs in the past.

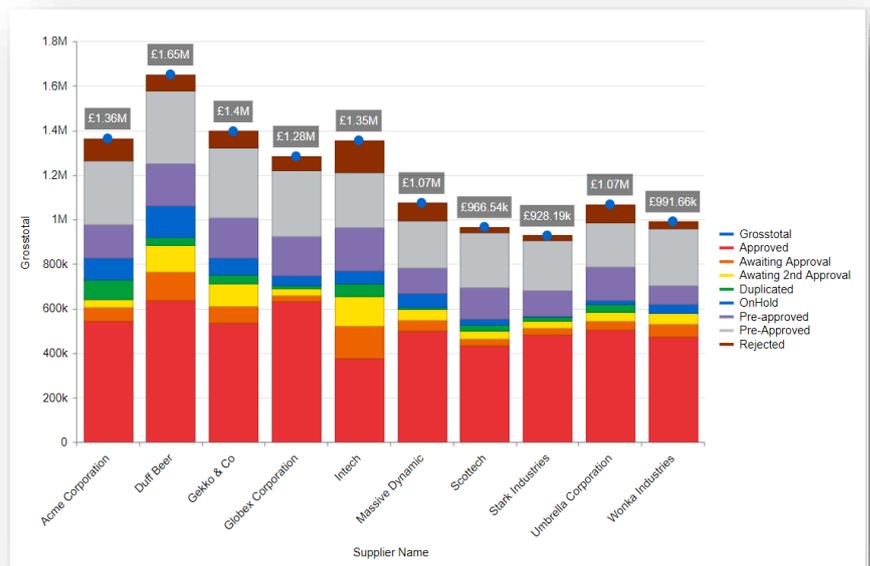


FIGURE 1 PIVOT COLUMN VISUALISED AS A STACKED BAR CHART

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## 2. Bring fresh excitement to your dashboards

We first introduced rich HTML components not too long ago and since then, we have seen so many creative uses of this functionality. Give it a try and experiment with HTML elements to engage your dashboard users even more.

Do you want to drive more visits to your office or store? Why not embed a responsive map to your informative dashboards!

Is your goal to promote social media engagement from your dashboard home page? Simply add a Twitter feed preview, so that your users can catch up with the latest company updates.

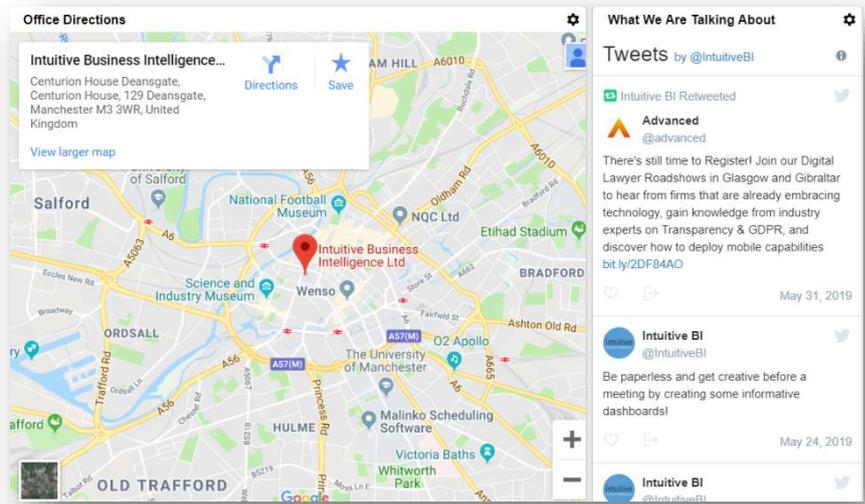


FIGURE 2 TWITTER FEED PREVIEW AND GOOGLE MAPS EMBEDDED IN HTML COMPONENTS

## 3. Get effective (and a little flashy) with HTML dashboard launchers.

Speaking of exploring the HTML component functionalities, you can now bring a creative twist to a useful home page. Instead of having multiple dashboards load upon initial login, take advantage of a neat HTML launcher. Thus, you can improve loading speed, reduce the amount of home page dashboards and create a professionally looking landing page. Find the dashboards you are interested in with one click.



FIGURE 3 DEMO AP DASHBOARDS LAUNCHER

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The best part – you can create HTML launchers without any code whatsoever starting from v.5.2.

#### 4. Get personal and on brand with dashboard backgrounds.

No professional dashboards are truly finished without your branding. Starting from v.5.2 of IBI Dashboards, you can take the creative approach one step further beyond the general user interface settings (all without any code).

Building dashboards for multiple clients? Embedding the dashboards to your online company portal? Add the final touch by including a branded background and get creative with your dashboard look & feel more easily than ever before.

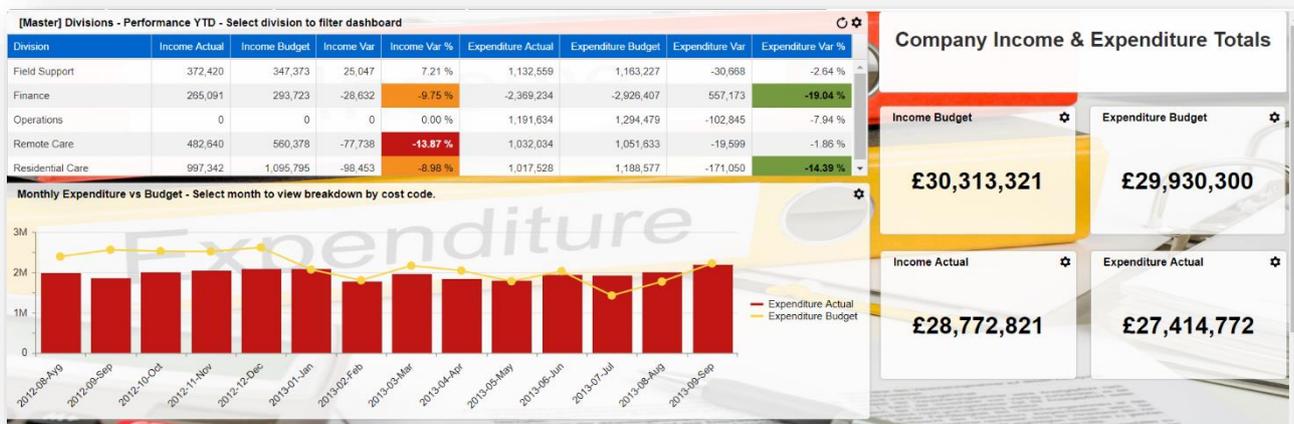


FIGURE 4 DEMO OPEN ACCOUNTS DASHBOARD WITH BACKGROUND AND TRANSPARENCY SETTINGS

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## 5. Analyse data for multiple accounts in a smarter way.

Do you manage multiple client accounts, each with different security settings? Or, perhaps you want to easily compare statistics regarding your most at-risk teams? Create a dashboard 'portal' and never worry about changing user sessions and keeping login details handy.

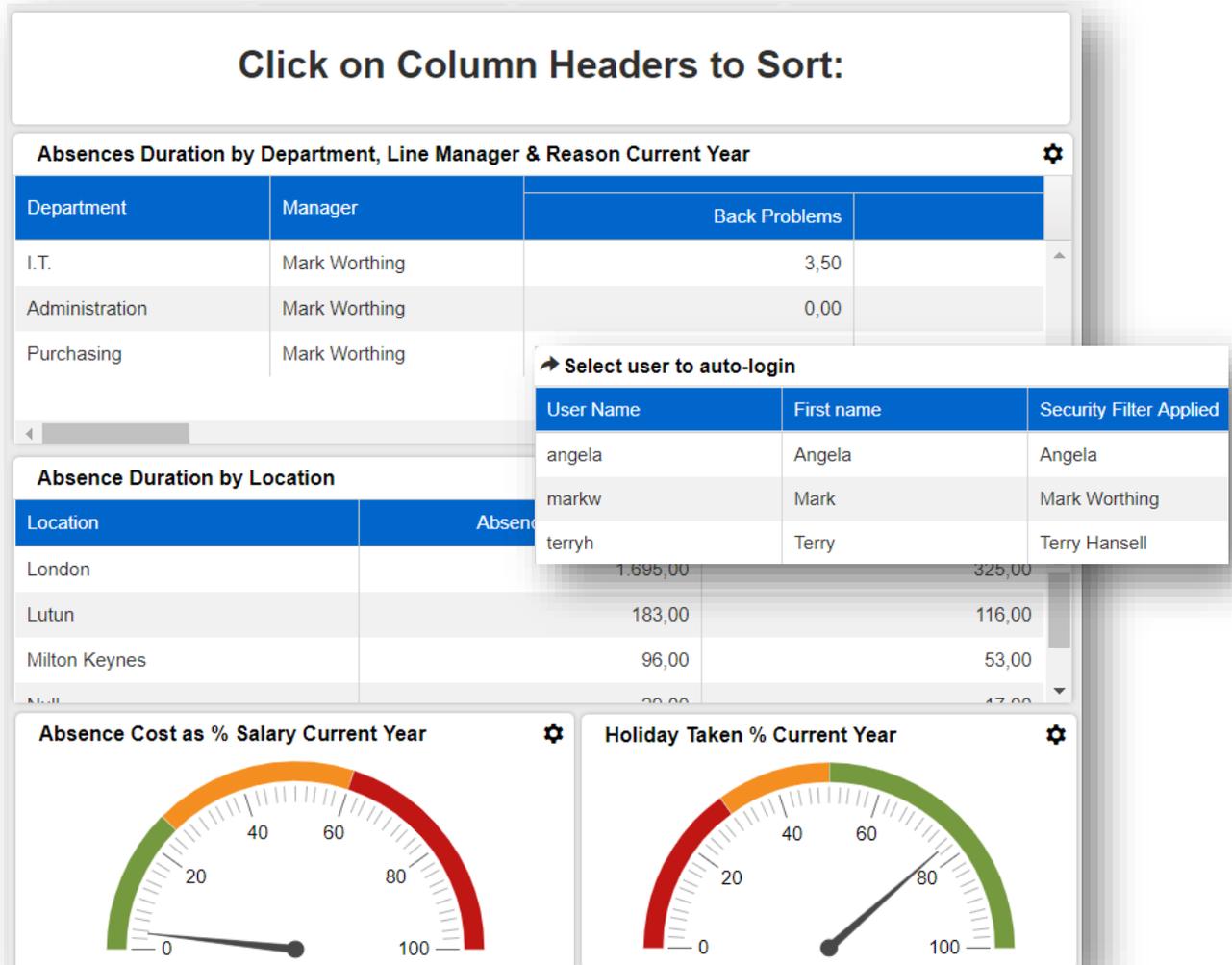


FIGURE 5 DASHBOARD AUTO-LOGIN VIEW FOR MARK WORTHING'S SUPERVISOR (DEMO)

By combining the [drillout](#) and [auto-login](#) functionalities, you can manage accounts and notice trends quickly, easily and securely.

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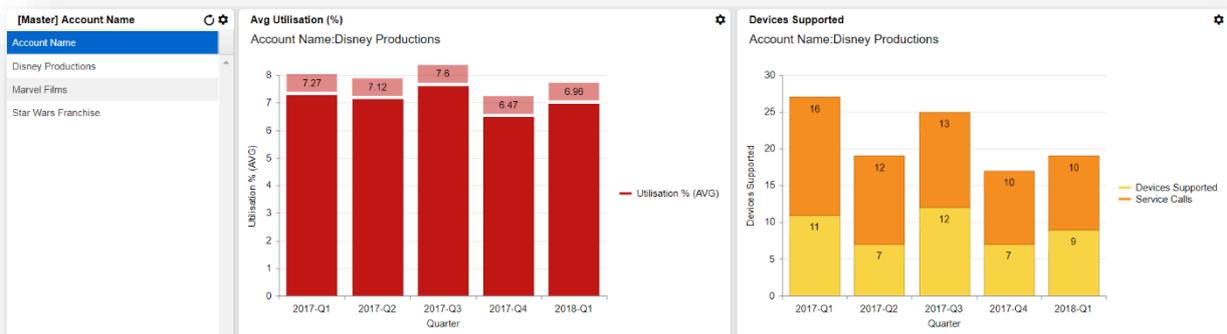
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## 6. Reduce clutter and show summarised information with linked datasets.

Creating linked datasets will allow you to show and analyse more data on your executive dashboards. E.g., you can show device utilisation alongside service calls information on your Print Management dashboards. Why build two separate dashboards when you can be more effective and to the point with one executive dashboard?

*Tip:* You can even manage linked security settings (e.g., based on Manager in both datasets).



**FIGURE 6 DEMO DASHBOARD BASED ON LINKED PRINT VOLUMES AND DEVICE SERVICE CALLS DATASETS**

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## 7. Reduce the amount of dashboards you create or publish and stay organised!

If you are interested in Accounts Payable data for instance, you can set up your linked dashboards so that Managers can login and see not only the outstanding invoices, but also linked data for any corresponding invoice errors. For example, if one of the Managers supervises four Suppliers, they can swiftly identify the most common errors. In the example case below, Duff Beer is the most problematic Supplier.

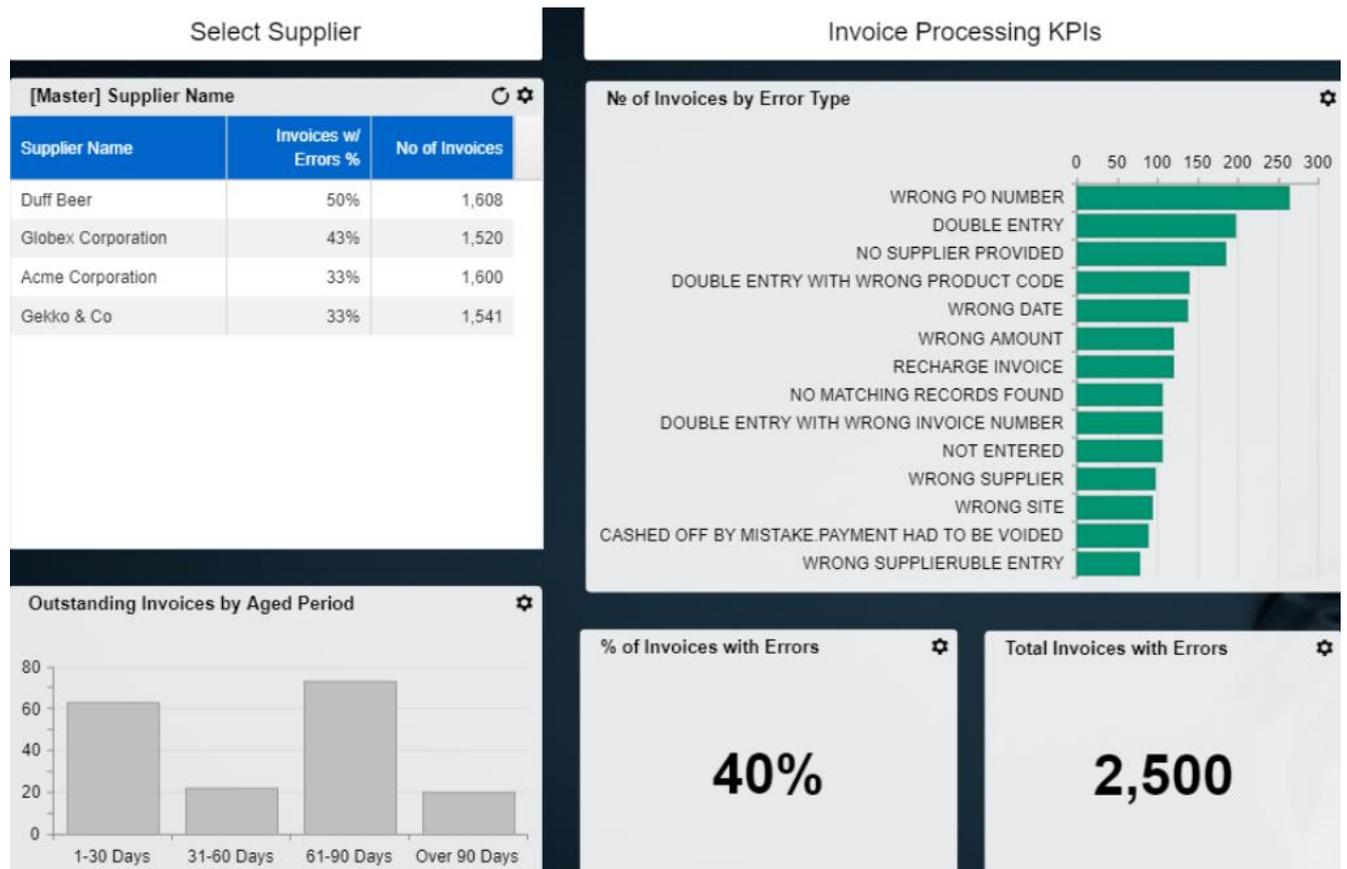


FIGURE 7 DEMO SUPPLIER DASHBOARD AS VIEWED BY MANAGER 1

Linking datasets may be especially helpful for HR professionals. You can design secure dashboards for Managers and Supervisors that visualise your company's most important data - all in one place.

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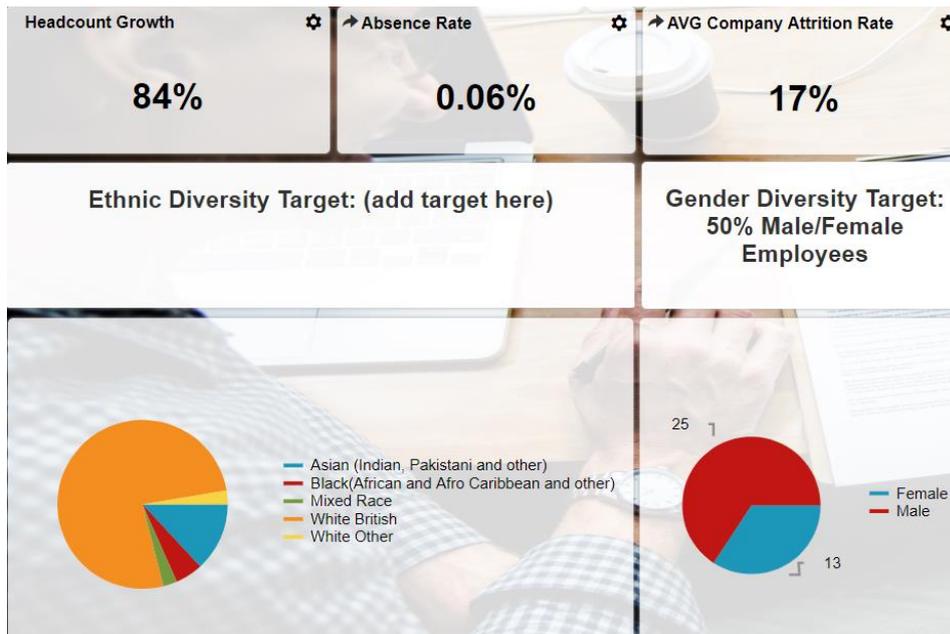


FIGURE 8 DEMO HEADCOUNT DASHBOARD LINKED WITH ABSENCES AND ATTRITION DATA

## 8 Manage security, users and data all in HTML5 – no interruptions

Do you manage lots of data sources, datasets and users? The latest release of the Intuitive software packages all administrator and design functionalities (and even adds more) into just one client using HTML5.

- *Why HTML5?*

HTML5 is a revised standard of the original HTML language. Any cross-platform applications implementing HTML5 today are ready to meet contemporary rich media demands. Worries regarding browser and device compatibility are long gone. Moreover, HTML5 offers a greater scope to developers to come up with responsive and engaging web content.

- *How IBI implements this standard?*

From version 5.1 of our software onward, you can manage your entire dashboard configuration solely in HTML5. Need to edit the data source while working on a component? It's just a click away. Think of a user who should have exclusive access to this version of a dashboard? Again, only a few quick settings away. All without the need to jump to a separate client or starting a new user session. Be quicker and more effective when fine-tuning your IBI setup and enjoy a longer coffee break!

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## What Next?

If **you** are excited about the new Intuitive BI software, then get in touch with us now at [support@intuitivebi.com](mailto:support@intuitivebi.com) to find out more.

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