Deltek

WorkBook Intelligence

Dashboard Designer Best Practices

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Overview

WorkBook Intelligence is an add-on to the WorkBook web-based application that enables you to provide users with insights and analysis to help them make business decisions. It is delivered as a number of dashboards within the WorkBook Dashboards module, and it uses the existing iFrames functionality.

As a Designer, you can create, design, edit, copy, and share dashboards. See the *Deltek WorkBook Intelligence Dashboard Designers Guide* for information about how to perform these tasks.

Additional Documentation

You can perform a Deltek Support Center search for additional documents at the following link:

> https://deltek.custhelp.com/app/answers/detail/a_id/79935

Supported Products

Compatibility Matrix

Information about platform requirements is maintained in the Deltek Product Support Compatibility Matrix, located on the Deltek Support Center. In the Matrix, search on "WorkBook" to navigate quickly to the information that you need.

Internal Link

https://home.deltek.com/sites/products/Documents/DeltekProductSupportCompatibilityMatrix.pdf

External Link – Deltek Support Center

Deltek Product Support Compatibility Matrix

Introduction

This guide provides some suggested best practices for planning, implementing, and maintaining WorkBook Intelligence dashboards.

Plan

- Define the dashboard's target audience. Design the dashboard with their needs and skills in mind.

- Define the dashboard's objective: what decisions does the target audience need to make? What question(s) does the dashboard need to answer?

- Decide which widgets best visualize the data that they need to see so that they can make those decisions.

- Decide what kinds of filters users need.

- Establish naming conventions. You cannot use WorkBook's translation functionality within WorkBook Intelligence, so using terminology that is consistent with the standard WorkBook English-North America lexicon is recommended as a best practice. Be consistent; if the same field appears in multiple places, use the same name for it everywhere.

Implement the Design

- When creating a dashboard, apply a title to the dashboard (using the $\mathbb{T}$ icon) immediately after you select the data source and click Create in the New Dashboard dialog box.

- Decide how to lay out the widgets.

- Minimize a possible impact on performance by limiting the number of widgets on a dashboard. It is best practice to use a maximum of 20-25 widgets.

- When adding a widget to a dashboard, the New Widget dialog box opens. You can either select data at that point or open the Advanced Configuration page. It is best practice to use the Advanced Configuration page.

- When changing the color palette of a dashboard, the color palette can also apply changes to the coloring of conditional formatting that you might have applied to widgets. It is best practice to review all widgets on the dashboard after you change the color palette to ensure that any specific color edits that you made are retained as required.

- When applying formatting to numeric values in widgets, be aware that this formatting is lost if you change the dashboard's color palette. It is best practice to apply the dashboard color palette first, and then apply the widget-level color formatting.

- For maximum efficiency, share dashboards to groups, rather than to single users.

- Organize related dashboards into folders.

- Place an accordion dashboard in the same dashboard folder as its parent dashboard so that you can manage and organize related dashboards easily.

Maintain the Dashboard

Evaluate the dashboard by asking questions such as the following examples and then make improvements and adjustments as needed.

- Can the target audience use the dashboard to make the decision(s) for which it is intended?
  - If not, identify why users do not have the information that they need—is important information missing, inaccurate, or outdated?—then adjust the data source(s), visualizations, and filters as appropriate.
  - Check that data source(s) are built at appropriate frequencies, and adjust build schedules accordingly.

- Is the data that is displayed still relevant and still at the right level of detail?

- Is the dashboard intuitive for the target audience?
  - Move widgets to make the information clearer if needed.
  - Use color to identify "good" or "bad" values, add trend lines and threshold lines.
  - Reduce the number of widgets by splitting the dashboard into multiple dashboards if the dashboard is too complex.
  - Use methods such as accordions to simplify dashboard navigation.

- Does the dashboard use the correct widget types to visualize the data and convey a clear message?
    - Confirm that each widget is appropriate for the conveying the information that it is intended to convey. For example, use an indicator widget to show a single figure or a single figure and a gauge that represents its range; use a bar chart to compare many items; use a pie chart to show one static number, divided into categories or to represent numerical amounts in percentages, and so on.

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