

What is the dashboard design process?

Designing a new dashboard can be as simple as following these core steps:

1. Gather requirements
2. Make sketches and build prototypes
3. Apply a visual style

1. Gather requirements

Ask your stakeholders and end users:

- What should we be monitoring?
 - Identify expected use cases and scenarios (e.g. Is my YTD revenue increasing, flat, or decreasing?)
- What data items do we need?
 - Are they already in the data warehouse? Where?
 - Do we need to calculate any new data?
- What are the key numbers that we need to monitor?
 - “By the numbers”
 - KPIs
 - Rank
 - Top 10
- Do we need any filters?
 - Time periods (by day, week, month, quarter, year, etc)
 - Locations, regions
 - Departments, areas of responsibility
 - High-level categories of information
- Are there any conditions for exception highlighting?
 - What are our Targets? Thresholds?
 - What values are green (good)?
 - What values are red (bad)?
- Are there opportunities for predictive analytics? Forecasting? AI?
- What types of summary information do we need?
- Do we need to drill-down to more detailed information anywhere?
- Are there distinct categories of information that should be separated (e.g. via tabs or multiple dashboards)

2. Make sketches and build prototypes

For each requirement, ask yourself: **How should we monitor it?**

Get out your sketch pad and create some designs. What are the correct data visualizations to answer the tasks? Show your sketches to your stakeholders and future users and ask for their feedback.

Gather some example data and build a quick prototype in Cognos. Cognos itself is very easy to use as a prototyping tool. Show your prototypes to your stakeholders and future users and ask for their feedback.

3. Apply a visual style

Start by looking at the visual design of your company's website (and printed materials). Try to leverage your:

- Logo
- Colour scheme
- Layout
- Headers and footers
- Style

Ensure that your dashboard focuses on the data, not the "UI chrome" around it. Use your corporate colours for your palettes for your charts (bars, pie slices, numbers, etc), and keep the rest of the charts muted with grays.