

# Setting Up Real-Time Dashboards



Webinar

*April 11, 2017*

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# Announcements

## News & Updates



Form Builder Re-Certification: May 23 & 25  
Form Builder Certification: June 20-22



Release of Zerion Documents

## Upcoming Webinars

Apr 18-20



JavaScript and JSON in 30 Minutes (3-Part)

4/25/17



Transformation Tuesdays

4/26/17



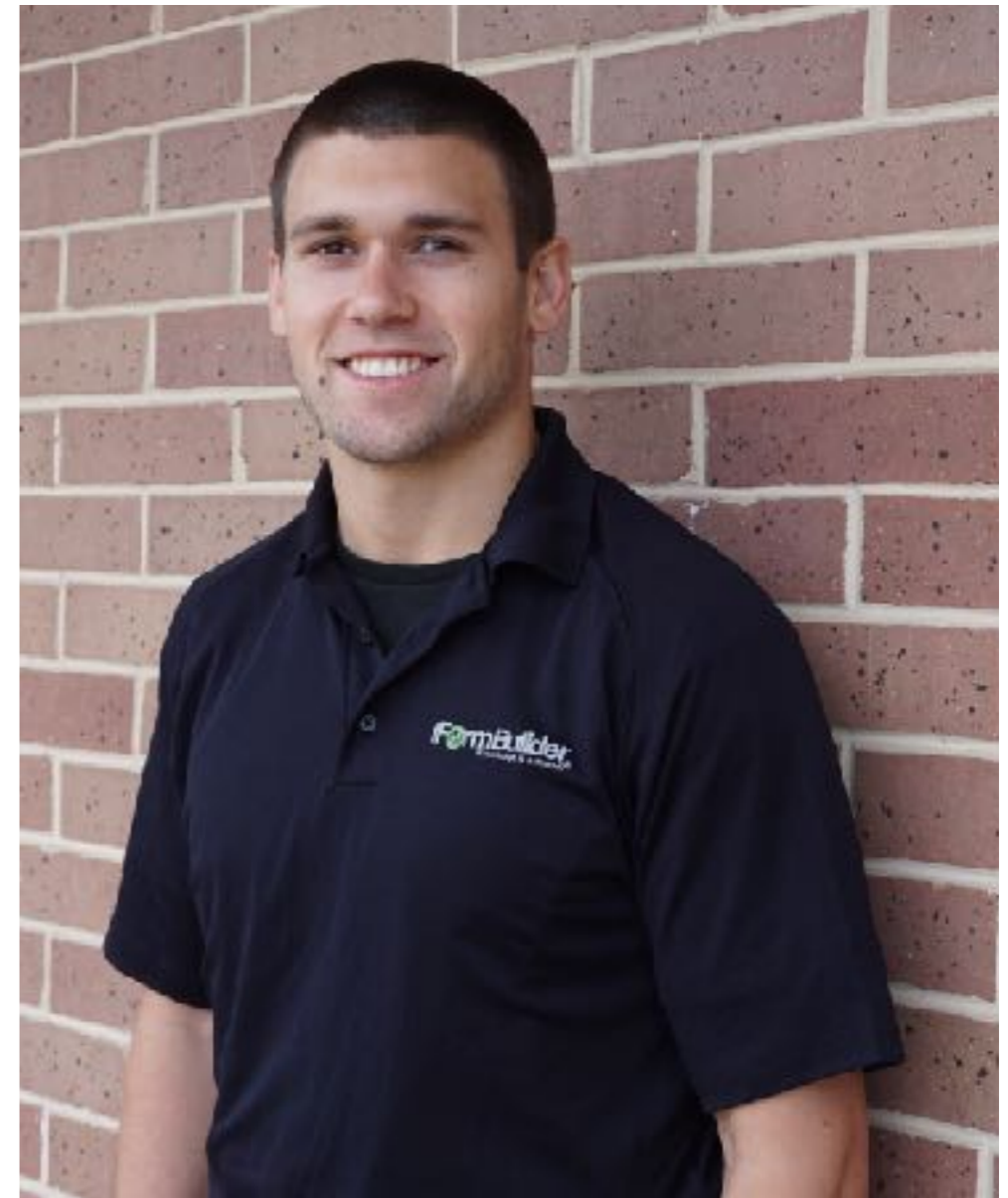
4 Overlooked Ways to Supercharge Your Forms

# About the Webinar

**Presenter:  
Ben Ray**

## **SETTING UP REAL-TIME DASHBOARDS**

- ▶ What are Dashboards and why should I use them?
  - ▶ Excel vs Dashboards
  - ▶ Dashboard Examples
- ▶ Setting up a Realtime Dashboard
  - ▶ Initial Project Considerations
  - ▶ Sharing and Collaboration
- ▶ Dashboard Do's and Don'ts



# What are Dashboards?



REAL-TIME DATA



KEY PERFORMANCE INDICATORS

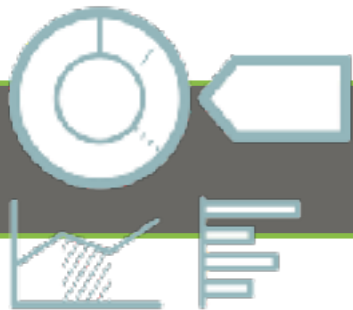


OBJECTIVE-BASED ANALYTICS

# What are Dashboards?



REAL-TIME DATA



KEY PERFORMANCE INDICATORS



OBJECTIVE-BASED ANALYTICS

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REAL-TIME DATA



KEY PERFORMANCE INDICATORS



OBJECTIVE-BASED ANALYTICS

# Why Should You Care About Dashboards?

**1** High-Level Monitoring

**2** Identify Problem Areas

**3** Real-Time Data = Real-Time Analytics

**4** Evaluate Performance Towards Goals

# Excel vs Dashboards

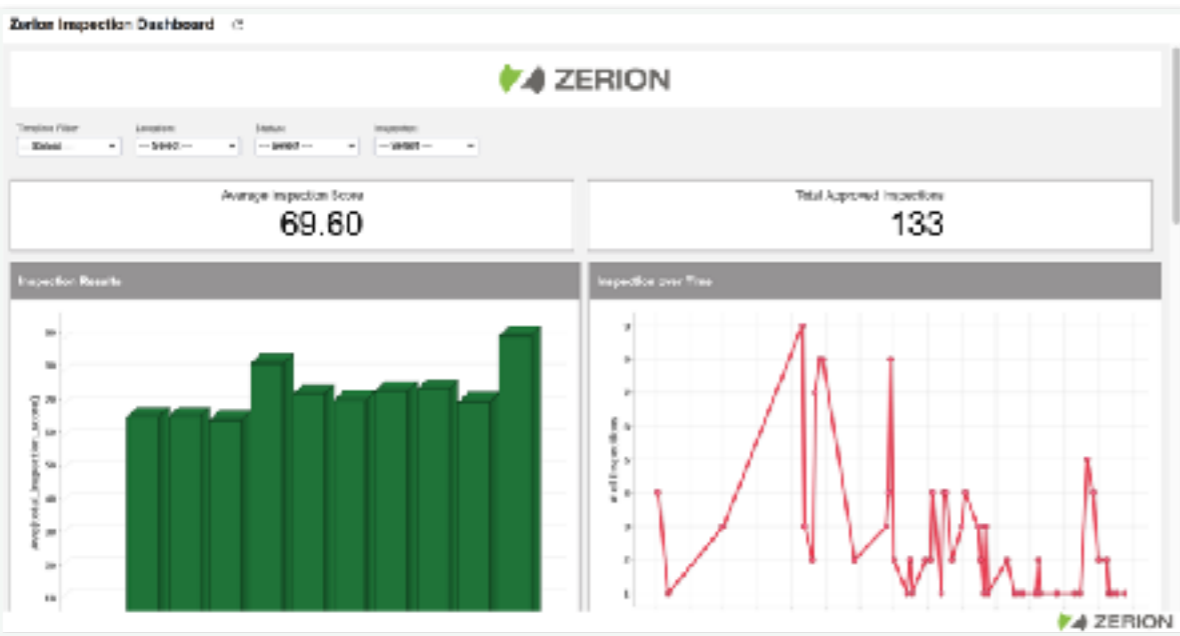


- Static Reports
- Email Collaboration
- Small Datasets
- Slow Feedback

- Realtime Reports and Dashboards
- Always Available
- Millions of Rows of Data
- Instant Feedback Loop

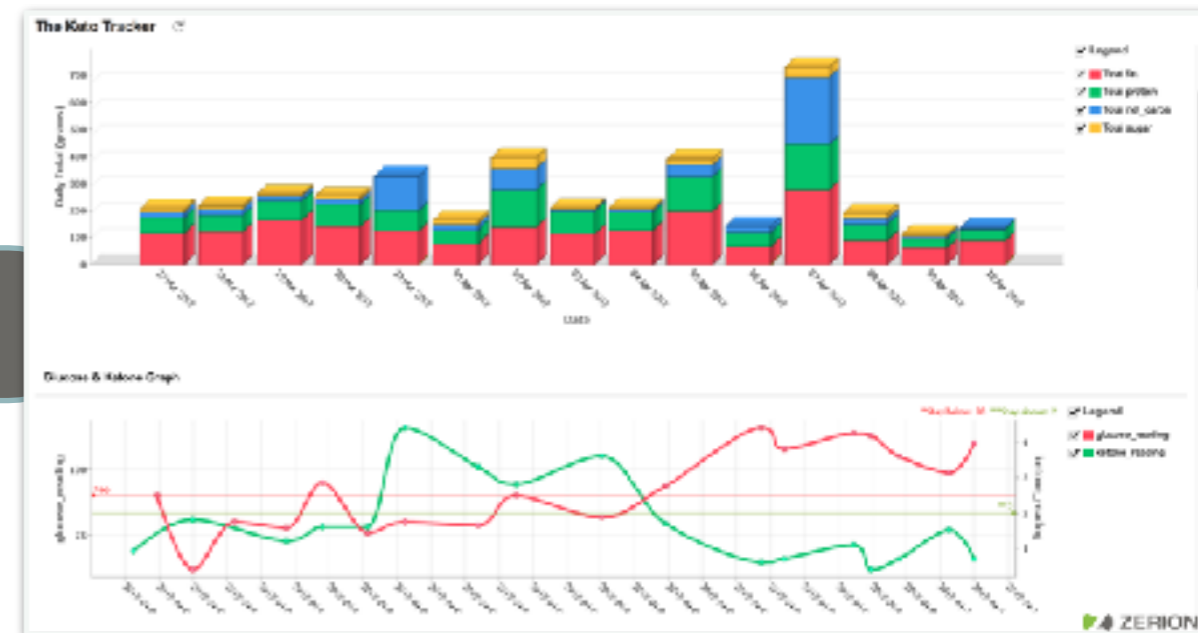


# Examples of Dashboards



**FIELD INSPECTION DASHBOARD**

**NUTRITION TRACKING DASHBOARD**



# BUILDING DASHBOARDS

Lets get started!

# Initial Project Considerations



WHAT ARE THE OBJECTIVES AND REQUIREMENTS?



WHO IS THE AUDIENCE?



WHICH REPORTING VIEWS ARE NEEDED?



WHERE IS YOUR DATA COMING FROM?

# Initial Project Considerations



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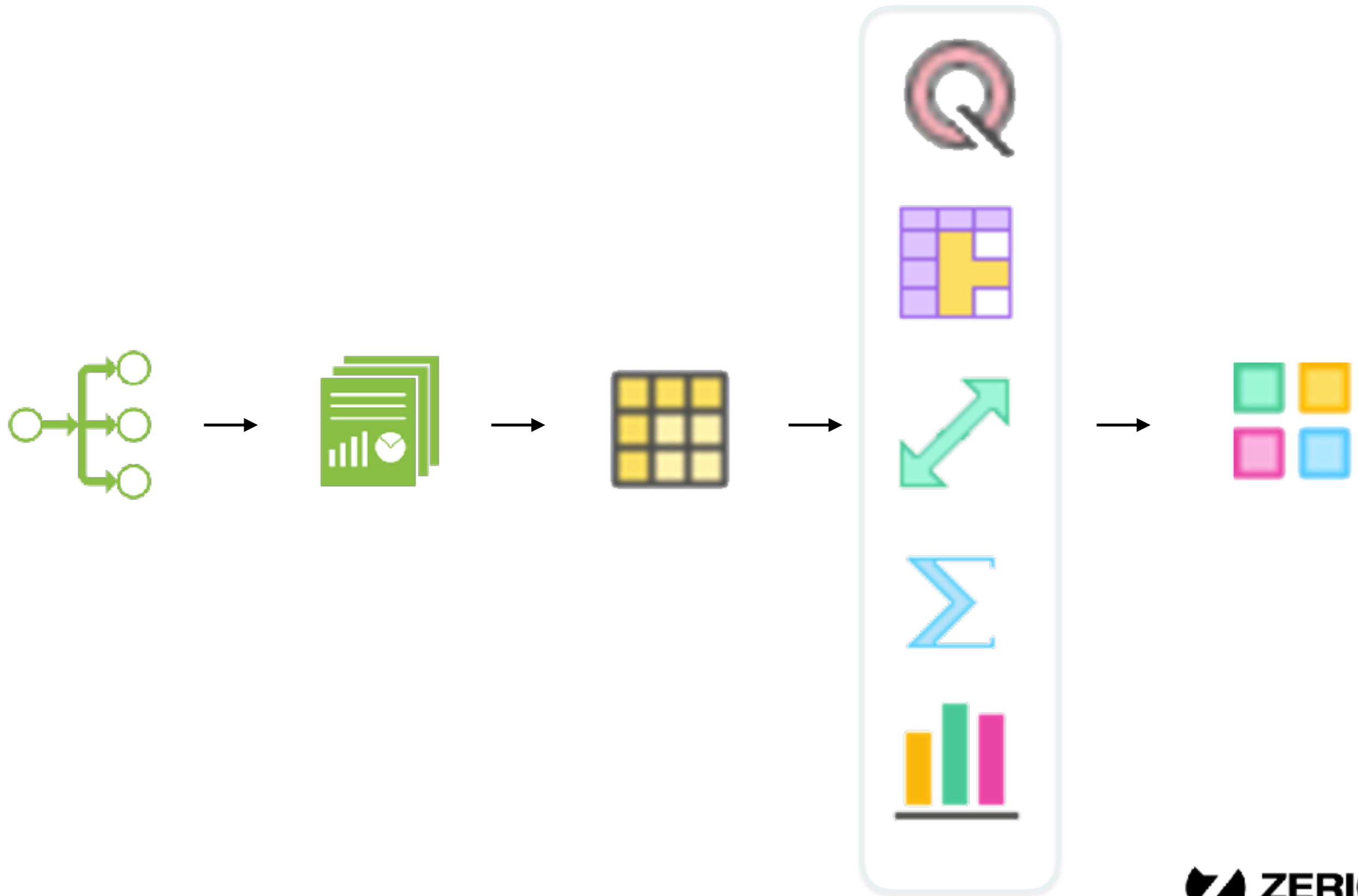


WHICH REPORTING VIEWS ARE NEEDED?



WHERE IS YOUR DATA COMING FROM?

# The Reports Workflow



# Choosing a Report Type



USE SQL STYLE STATEMENTS TO SELECT DATA



ENHANCED TABLE VIEW WITH GROUPING AND SORTING



VIEW DATA IN A HORIZONTAL AND VERTICAL MATRIX



GROUP RECORDS AND VIEW SUMMARY DATA



VISUALIZE DATA USING A VARIETY OF FORMATS



# Customize Your Dashboard

Themes

Sales Dashboard 

Filters



product\_sold:  Timeline Filter:  name:

Number of Unique Products

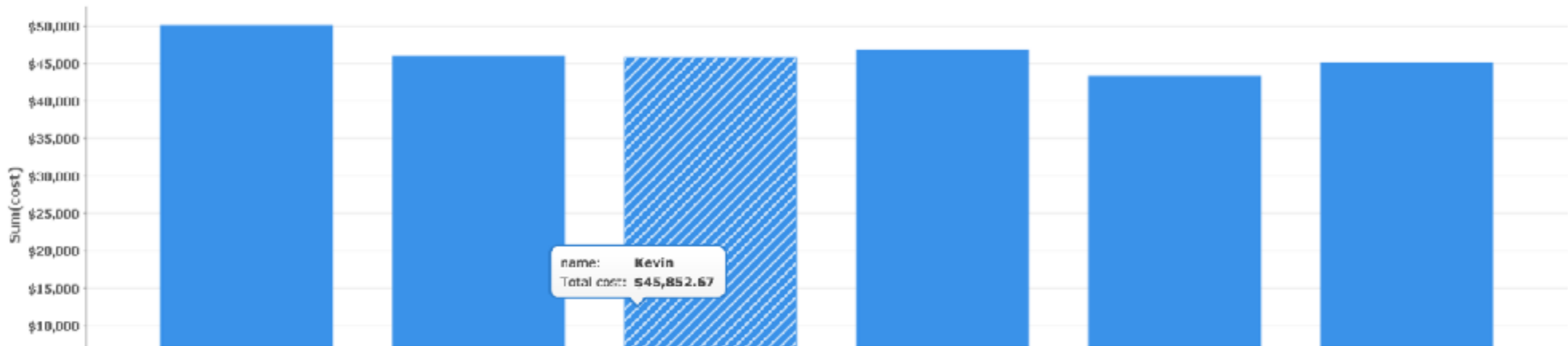
7

KPIs

Average Sale

\$277.56

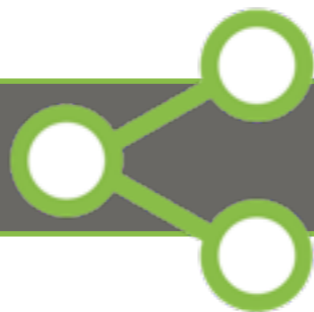
Sales by Employees



Report Views



# Sharing and Collaboration Options



SHARE TO OTHER USERS



PUBLIC AND PRIVATE PERMALINKS



EMAIL SCHEDULING



EXPORT RAW DATA

# Dashboard Do's

 Include Raw Data via Query Tables

 Conditionally Format Cells

 Add Data Filters

 Properly Share/Publish

# Dashboard Don'ts

Overuse Text Data Type



Perform Excessive Calculations



Clutter the Dashboard



Rely on Pie Charts



# THANK YOU



In 48 hours, you will receive an email with access to:

- Zerion Academy
- Recording of Session
- Session PDF

## **NEXT WEBINAR**

JavaScript and JSON in 30 Minutes  
(3-Part Training)

April 18,19,20 @ 4:30 PM EST

[BRAY@ZERIONSOFTWARE.COM](mailto:BRAY@ZERIONSOFTWARE.COM)

