I'M SPEAKING AT

ODTUG Kscope19

SEATTLE, WASHINGTON • JUNE 23-27

www.kscope19.odtug.com

SEATTLE

Washington State Convention Center

Give a Man a Report, Inform Him for a Day. Teach a Man to Create a Dashboard, Enlighten Him for a Lifetime.

Katie High

Kscope 2019 | Seattle, WA

06/26/2019

Agenda

What We'll Cover Today

1. Introduction
2. Financial Reports vs. Dashboards
3. Dashboards in PBCS
4. Tips & Tricks
5. Infolets
6. Q&A

About Katie High

- I will be celebrating my 4 year anniversary with SC&H in September!
- This is my first time in Seattle!
- I got engaged in February and will be getting married next year!

About SC&H Group

Financial Reports vs. Dashboards

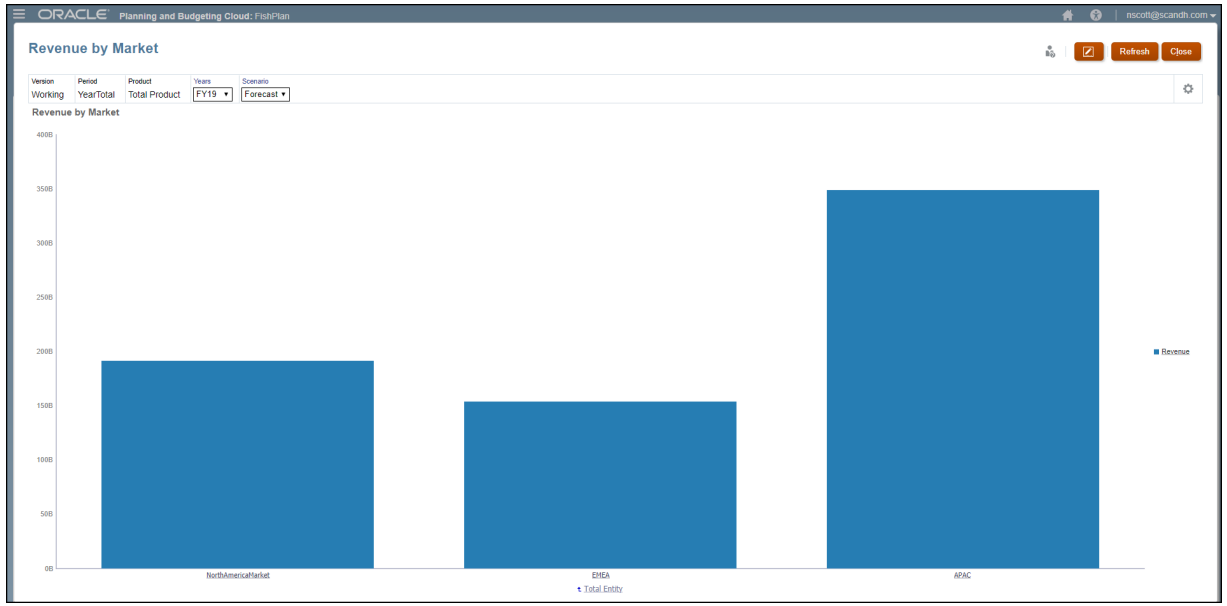
SC&H GROUP

Reporting in PBCS

- The reporting outputs from a PBCS application are critical for stakeholders to make informed decisions.
- PBCS reporting tools include financial reports and dashboards.
- Financial reports and dashboards each have their benefits and limitations.
- Both provide the user with data, but dashboards provide a story to allow users to make informed decisions.

Total Product Revenue by Market
2019 Forecast
USD (in millions)

	January	February	March	April	May	June	July	August	September	October	November	December	Year Total
North America Market	$13,877	$16,023	$15,996	$16,055	$14,510	$16,341	$16,063	$16,254	$18,192	$15,842	$16,263	$15,999	$191,415
EMEA Market	$11,016	$12,794	$12,823	$12,841	$11,554	$13,039	$13,115	$13,273	$14,635	$12,845	$12,963	$12,921	$153,818
APAC Market	$26,685	$29,524	$29,183	$29,056	$26,830	$29,287	$29,377	$29,401	$31,872	$28,692	$28,920	$29,320	$348,146
Total Entity	$51,577	$58,341	$58,002	$57,952	$52,894	$58,666	$58,554	$58,928	$64,699	$57,380	$58,146	$58,240	$693,379



Canned (Tuna) Reports

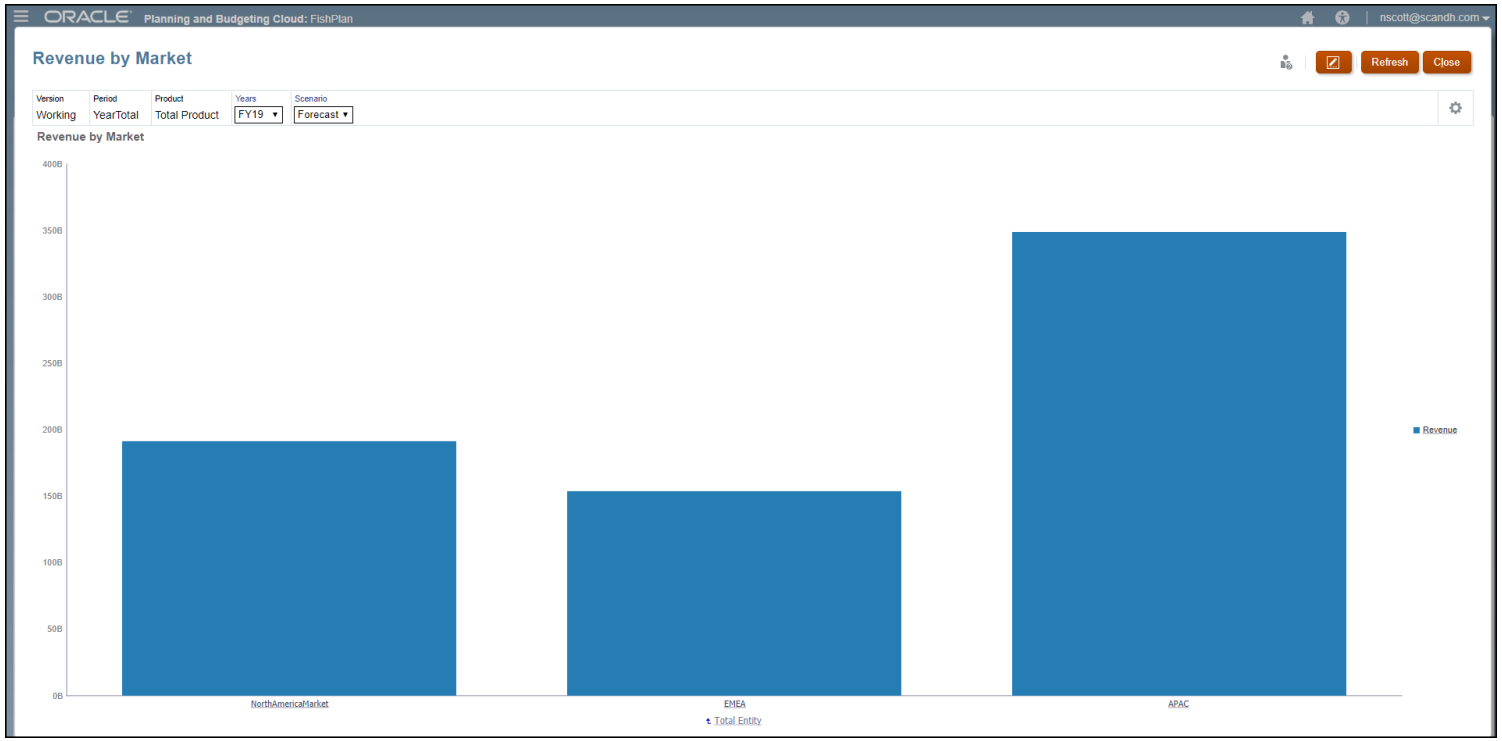
- Benefits
  - Standard template
  - East to interpret
  - Shows a record of data at a point in time
- Limitations
  - Static data set
  - Time consuming to design and develop
  - Administrative task

Total Product Revenue by Market
2019 Forecast
USD (in millions)

	January	February	March	April	May	June	July	August	September	October	November	December	Year Total
North America Market	$13,877	$16,023	$15,996	$16,055	$14,510	$16,341	$16,063	$16,254	$18,192	$15,842	$16,263	$15,999	$191,415
EMEA Market	$11,016	$12,794	$12,823	$12,841	$11,554	$13,039	$13,115	$13,273	$14,635	$12,845	$12,963	$12,921	$153,818
APAC Market	$26,685	$29,524	$29,183	$29,056	$26,830	$29,287	$29,377	$29,401	$31,872	$28,692	$28,920	$29,320	$348,146
Total Entity	**$51,577**	**$58,341**	**$58,002**	**$57,952**	**$52,894**	**$58,666**	**$58,554**	**$58,928**	**$64,699**	**$57,380**	**$58,146**	**$58,240**	**$693,379**

Dashboards

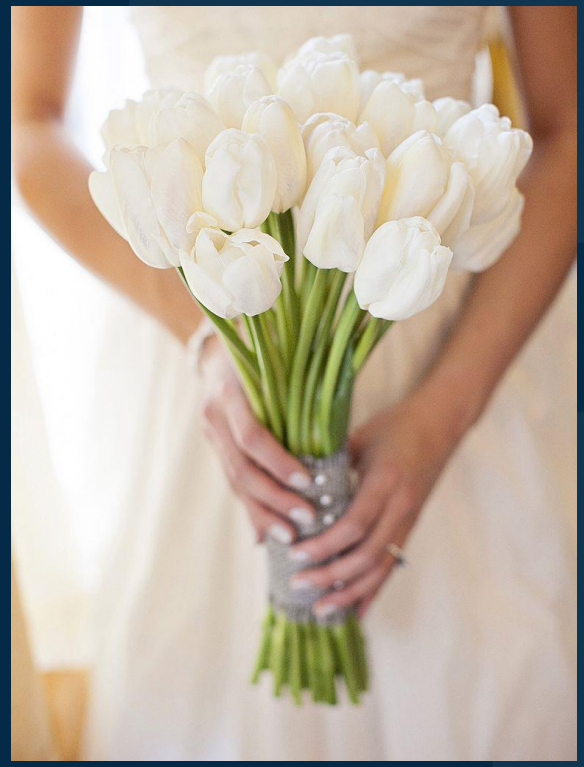
- Benefits
  - Customizable
  - User autonomy
  - Visually appealing and dynamic
  - Real-time data
  - Direct link compatible
  - Easy to add commentary
- Limitations
  - User learning curve
  - Data overload
  - Smart View displays dashboards as grids



Flowers:

1. White Roses

2. White Tulips

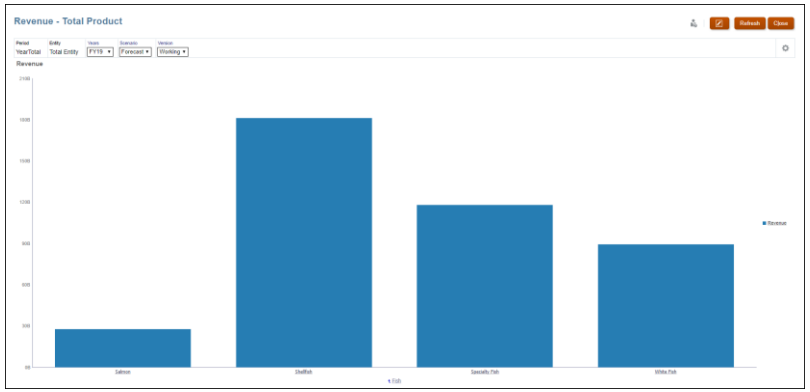


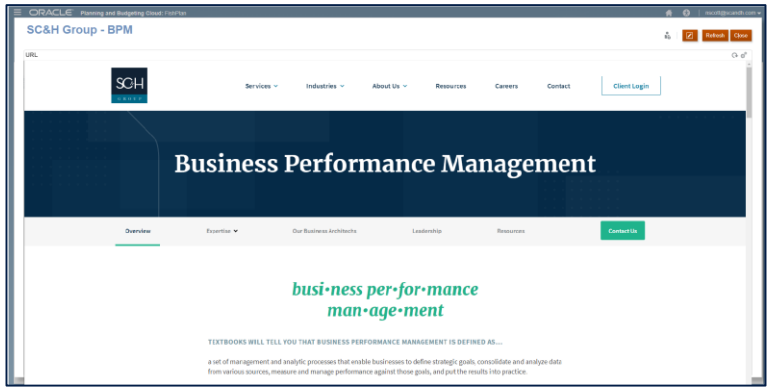
Dashboards in PBCS

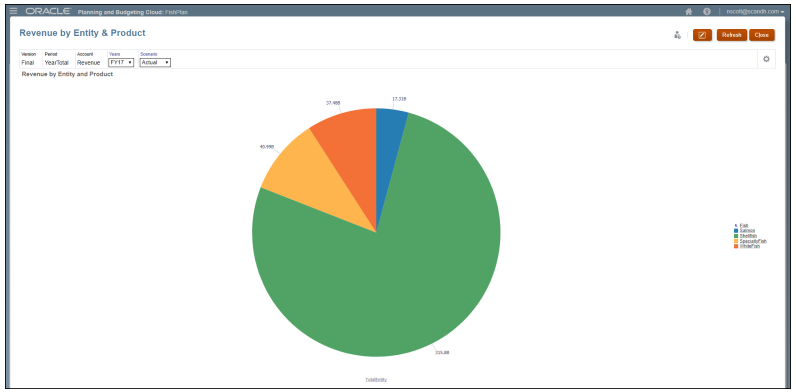
SC&H GROUP

Dashboard Overview

- A number of graph and chart types exist to help users make their data meaningful.
- Dashboards are more than just a graph on a screen.
- Data input web forms and business rules can be incorporated to transform a dashboard from an analytics tool to a comprehensive planning process.







Feeling Like a Fish Out of Water

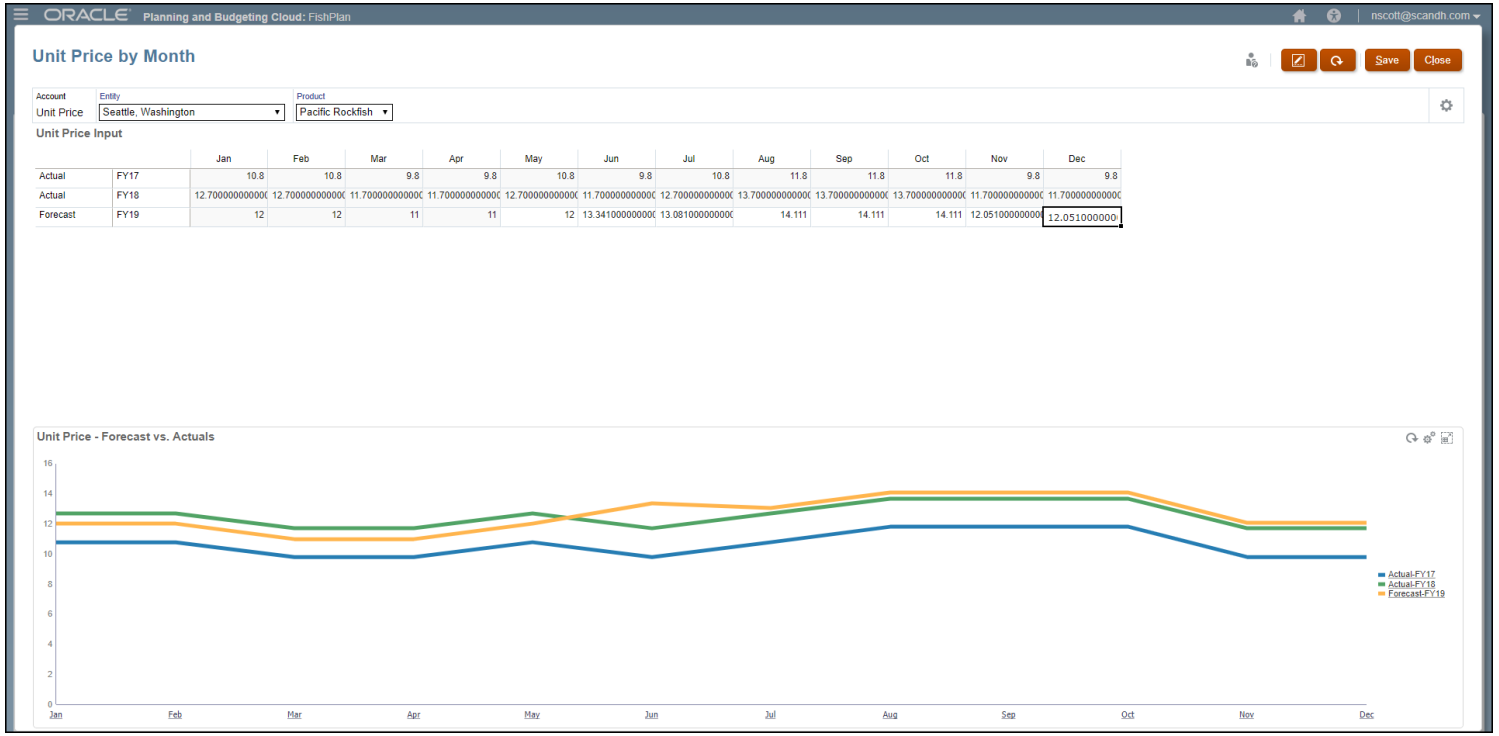
- Dashboards are designed to be an intuitive reporting tool that users of all expertise can learn and master.
- Getting started with dashboards is not exempt from the learning curve of a new functionality.

VIDEO DEMO

Creating a Dashboard

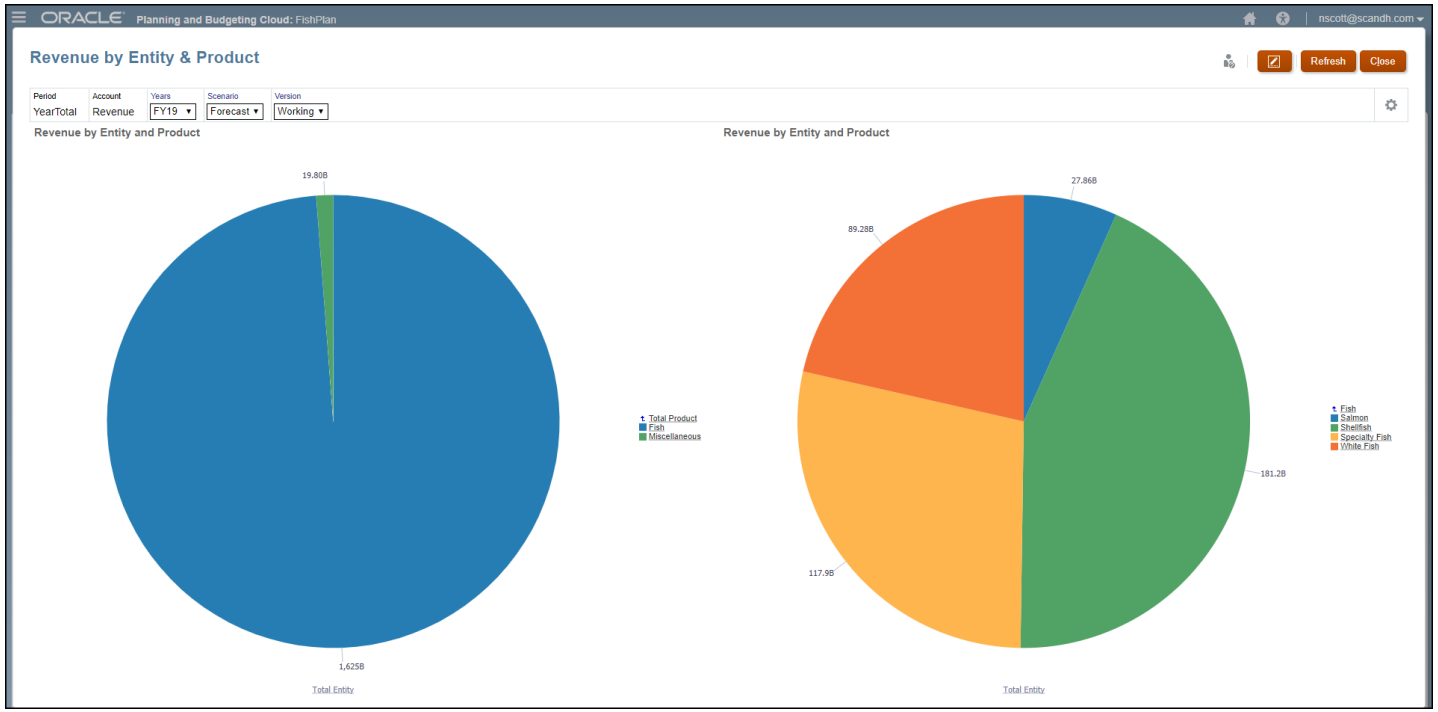
Real-Time Data Analytics

- In today's world, businesses cannot afford to be uninformed.
- Dashboards dynamically pull from an application and provide a live visual of the data.
- Data Input web forms, business rules, and graphs can all be combined to allow users to update data through the dashboard and see the effects in real-time.



Interactive Reporting

- Dashboards create a story behind the data to educate users.
- The dynamic nature of dashboards give users a chance to see data at any level.
- Users can “slice and dice” a data set to see as general, or specific as needed.

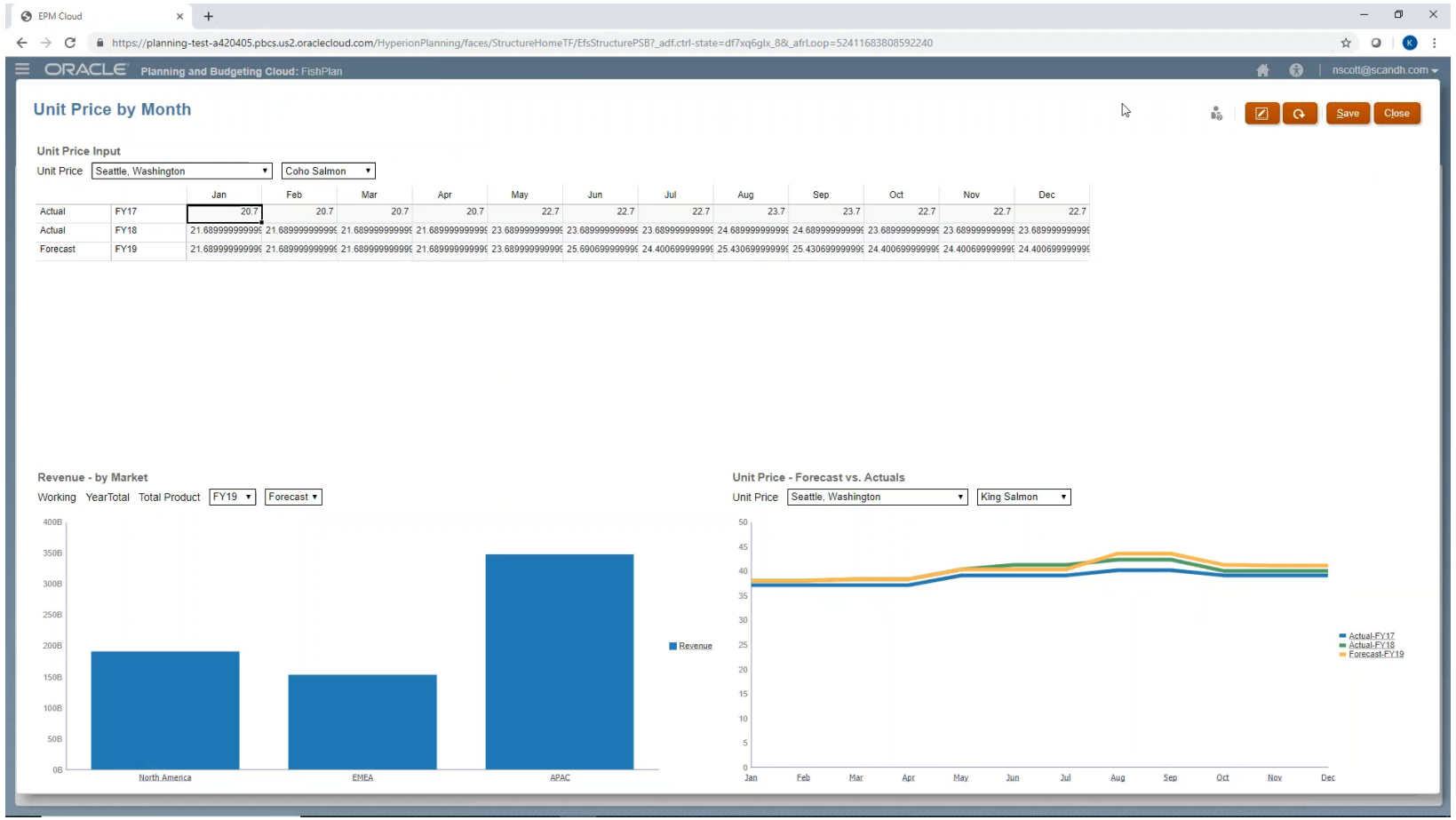


Plenty of Fish in the Sea

- The significance of data is not uniform across a user base.
- Dashboards allow users to create data visuals to meet their specific business needs.
- Better decision making is possible when users are given the chance to analyze the data in a way that makes sense for them.
- Dashboards can be as simple or intricate as the user needs.
- The visuals make the data more personal and intuitive to drive critical decisions.

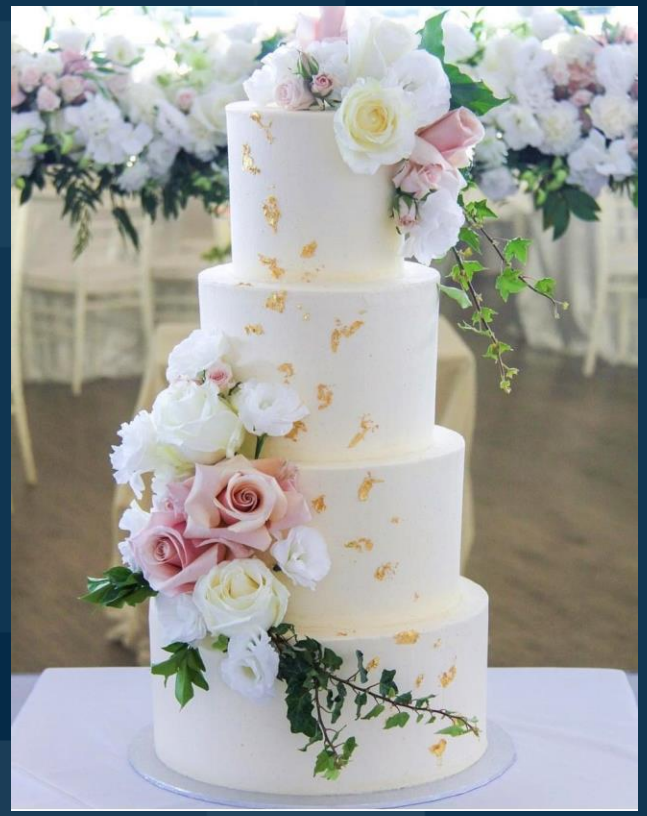
VIDEO DEMO

Planning & Real-Time Analytics

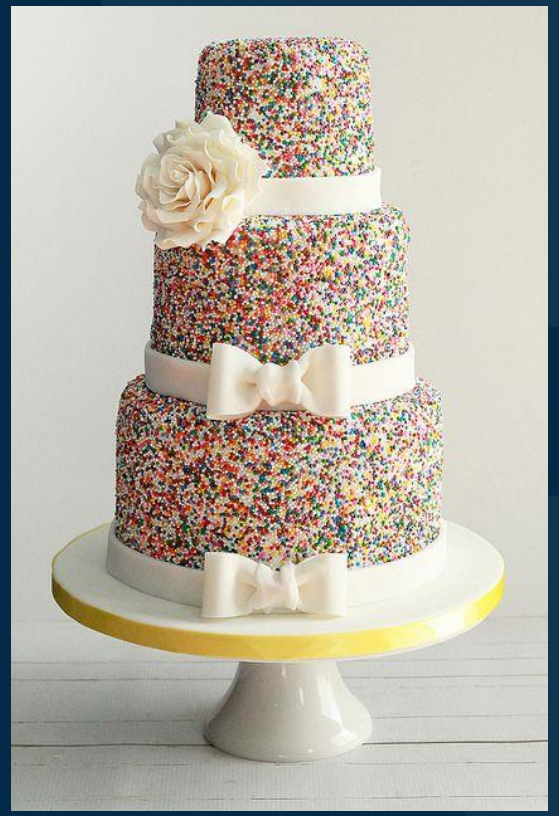


Cake:

1. Chocolate



2. Funfetti



Tips & Tricks

SC&H GROUP

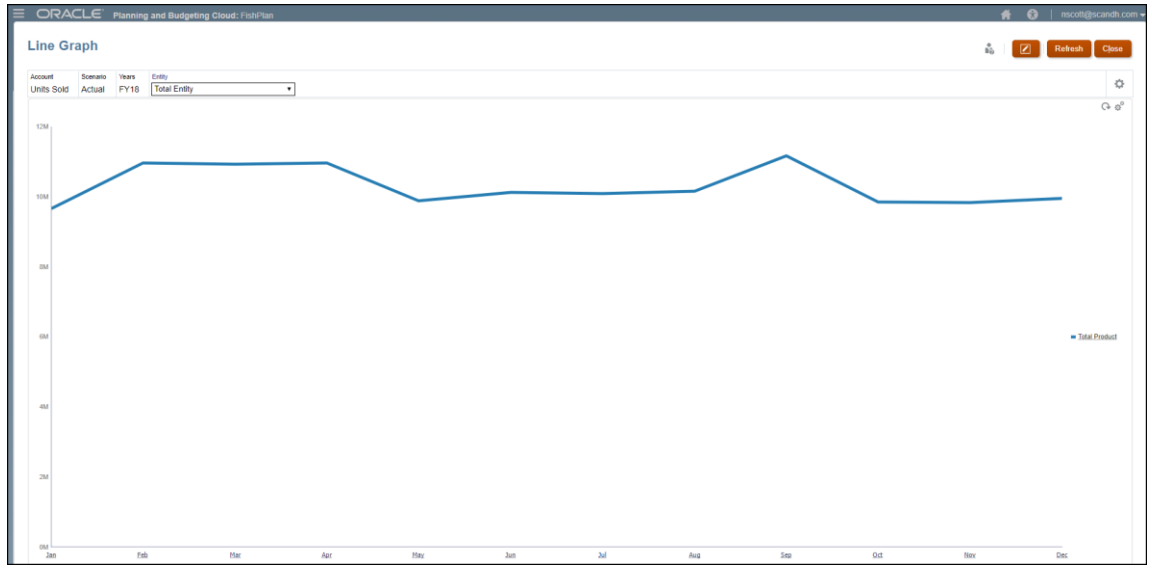
Tips & Tricks

Using the Right Bait

DASHBOARD TYPE	BEST USE
Area	Quantify change in volume of data over time.
Bar	Compare multiple data sets at once.
Bubble	Adaptation of a scatter graph to show data across 3 or more variables to create a correlation.
Column	Shows change in data over time.
Combination	Includes Bar and Line graphs to show changes in comparative data over time.
Doughnut	Variation of a pie chart that allows for information to display in the cut out center.
Funnel	Shows change in data across different phases or categories.
Gauge	Display data relative to a set range or goal.
Line	Shows change in data over time.
Pie	Depicts data as pieces of a whole.
Radar	Creates a unique access for comparing data across multiple variables.
Scatter	Used to display a correlation between two variables.
Tile	Allows users to select a specific intersection to display cell details.

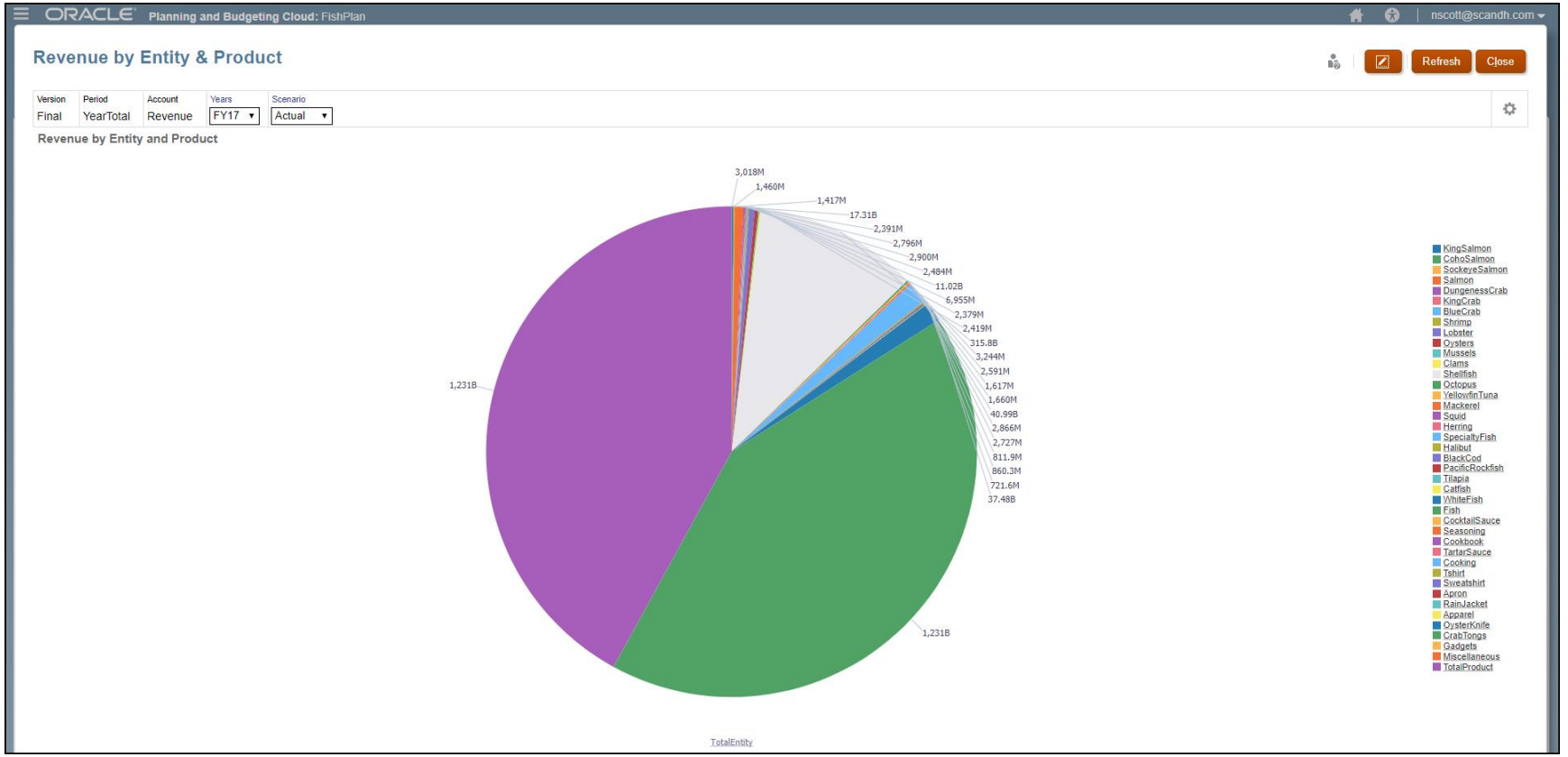
Tips & Tricks

Using the Right Bait



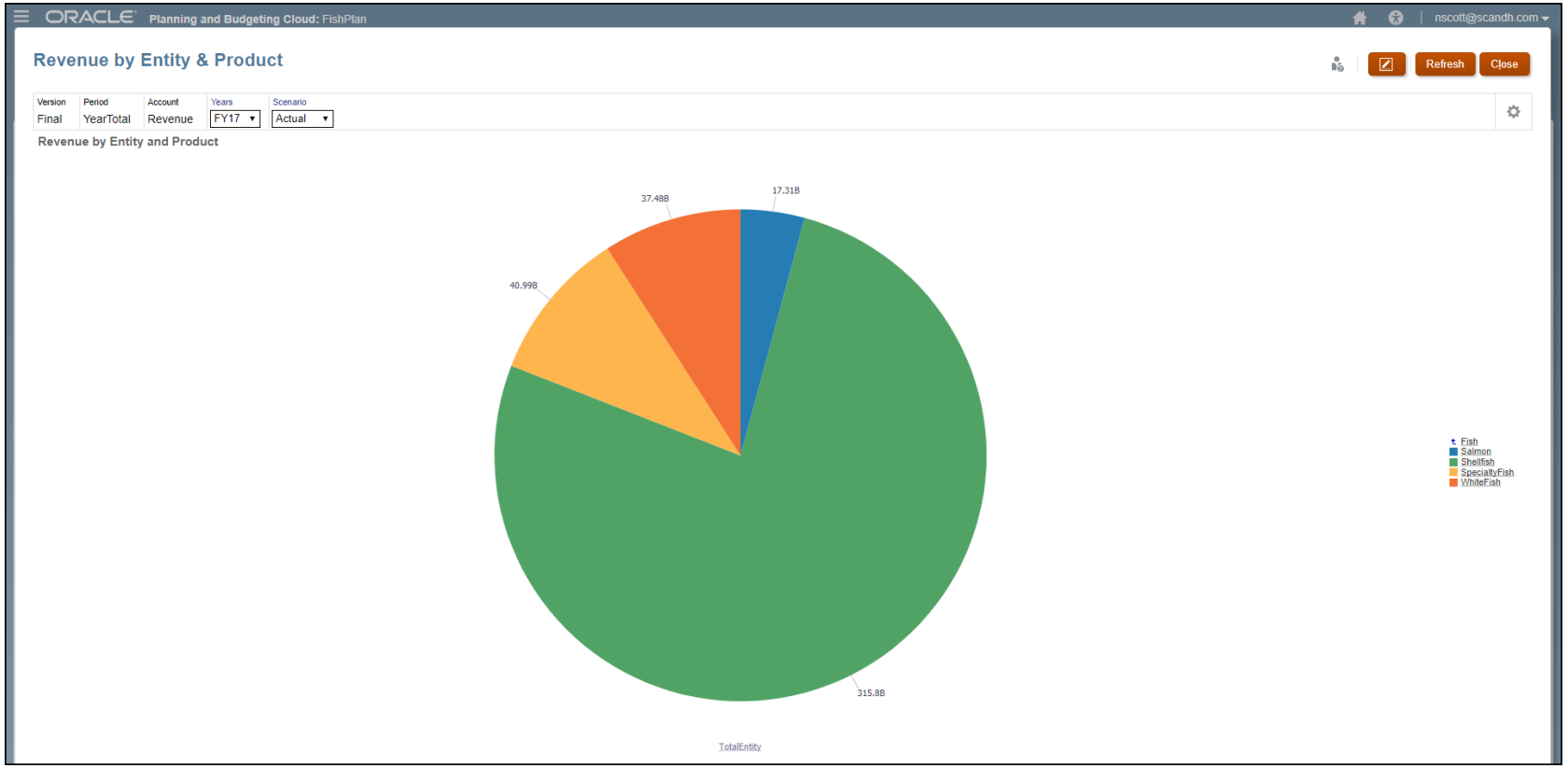
Tips & Tricks

Opening a Can of Worms



Tips & Tricks

Meaningful Visuals



Tips & Tricks

Getting Creative

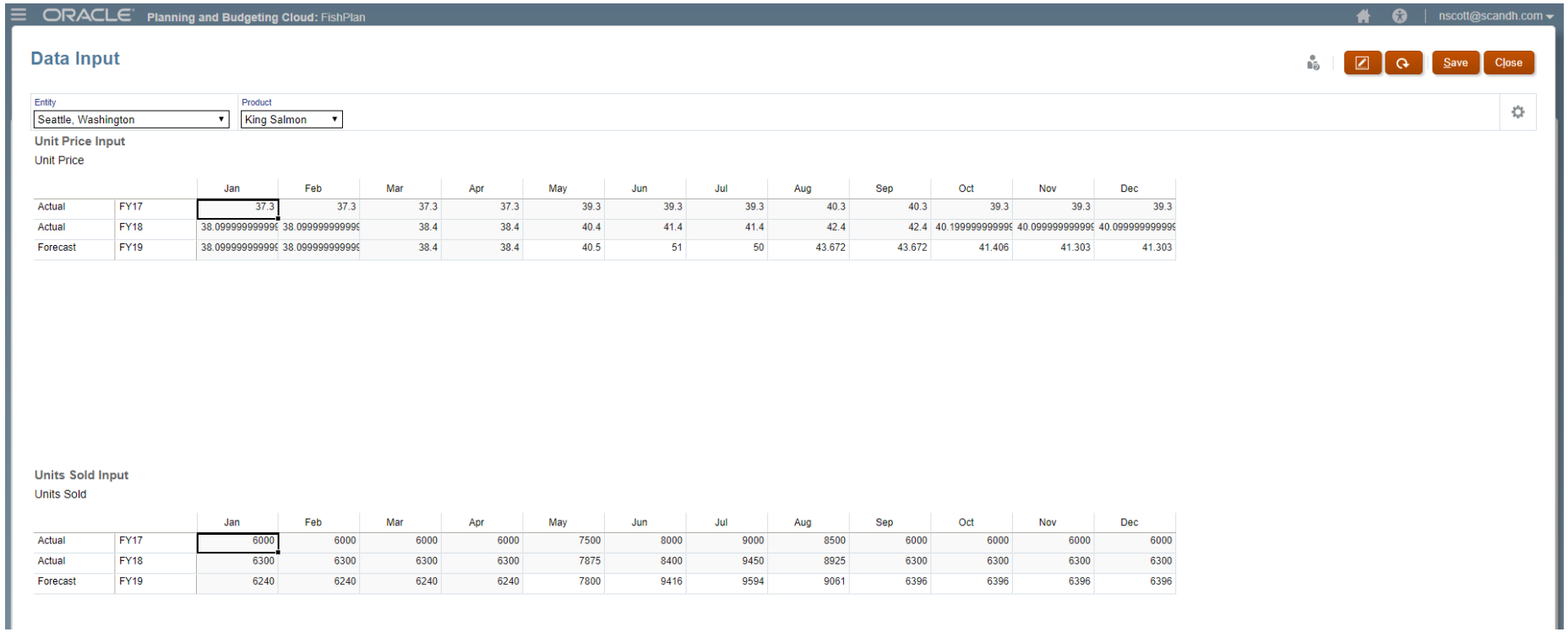
- Certain limitations that exist today can be solved by getting creative with dashboards.
- A heat map graph is not an available chart type, yet users can combine other PBCS functionality to create a work around.

		Current Year Actuals vs. Prior Year Actuals
Juneau, Alaska	King Salmon	-1451.879999999
	Coho Salmon	-1245.870000000
	Sockeye Salmon	-1036.590000000
	Dungeness Crab	-1115.069999999
	King Crab	-879.6299999999
	Blue Crab	-1038.225000000
	Shrimp	-891.0750000000
	Lobster	-923.7750000000
	Oysters	-1381.575000000
	Mussels	-1466.594999999
	Clams	-1358.684999999
	Octopus	-3441.675000000
	Yellowfin Tuna	-1823.025000000
	Mackerel	-4913.174999999
	Herring	-5730.675000000
	Halibut	-5076.675000000
	BlackCod	-1404.465000000
	Pacific Rockfish	-1365.224999999
	Tilapia	-4684.929000000
	Catfish	-1316.175000000
	Cocktail Sauce	4939
	Seasoning	9260
	Cookbook	3000
	Tartar Sauce	3526
	Oyster Knife	4081
	Crab Tongs	4490

Tips & Tricks

Getting Creative

- Composite forms can still be created and maintained via Dashboards.

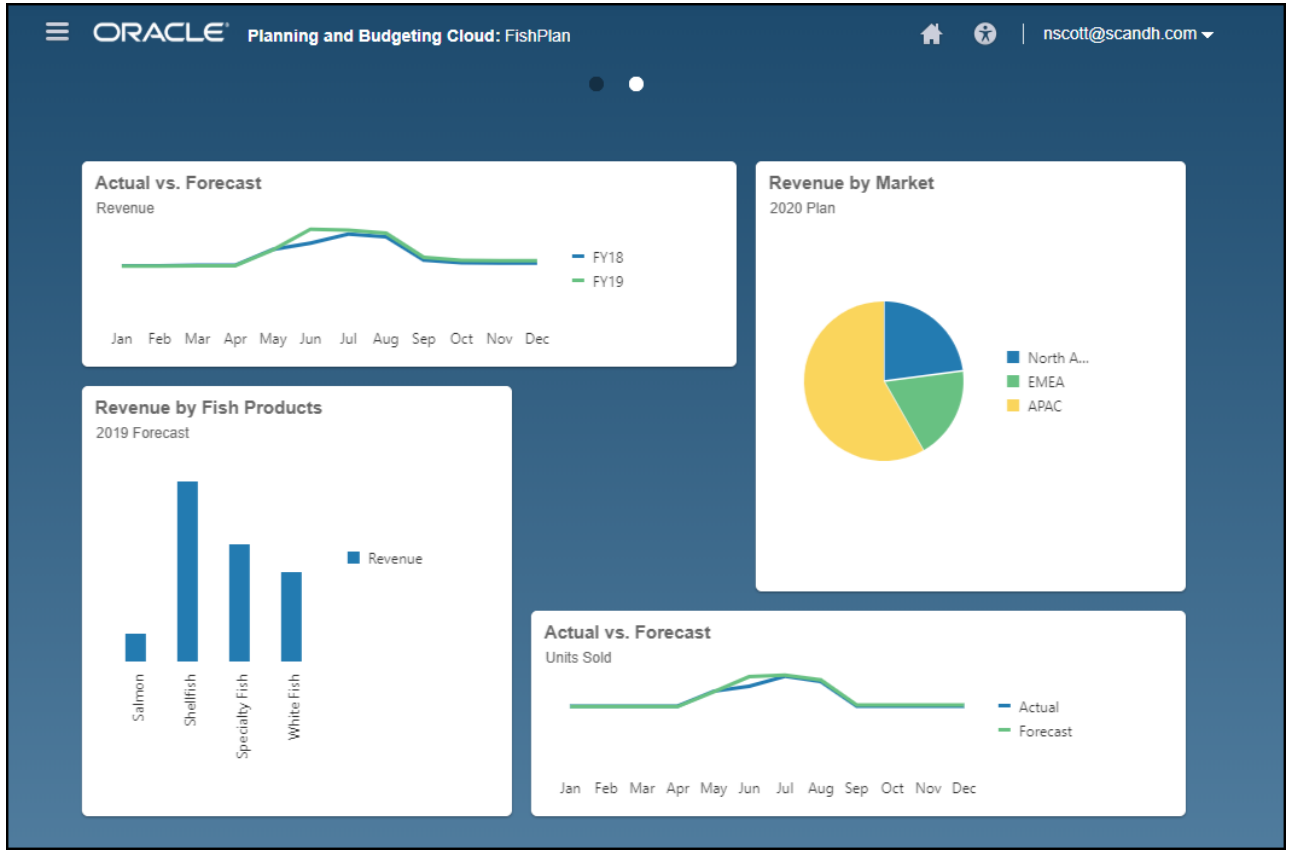


Infolets

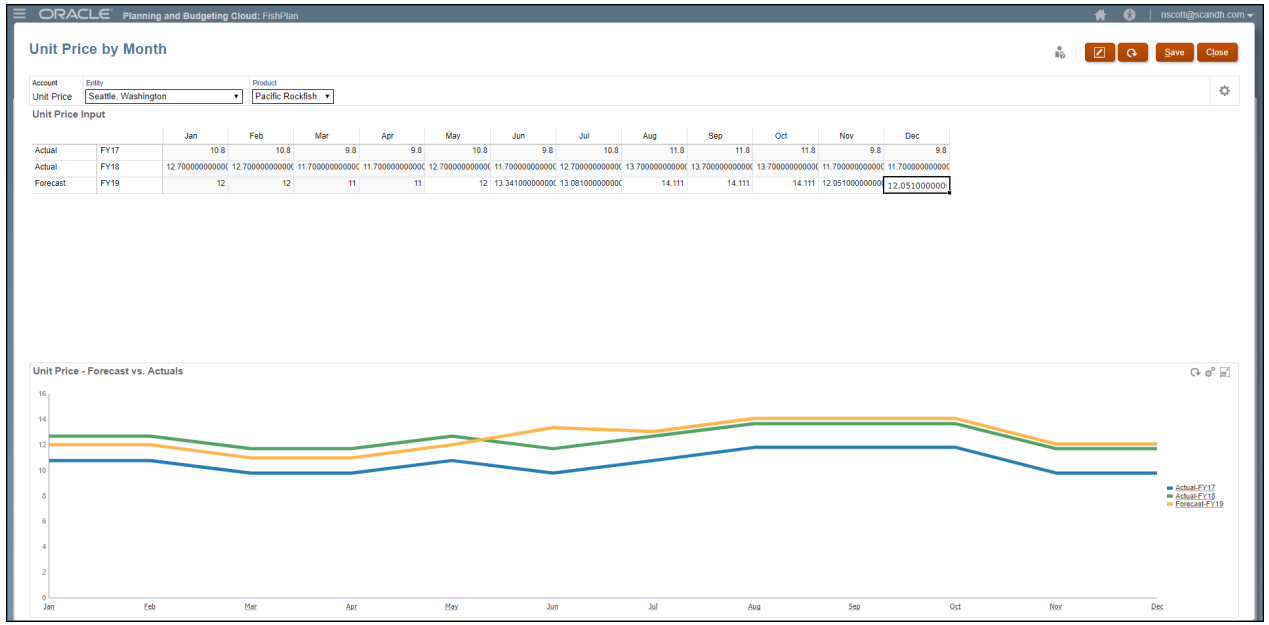
SC&H GROUP

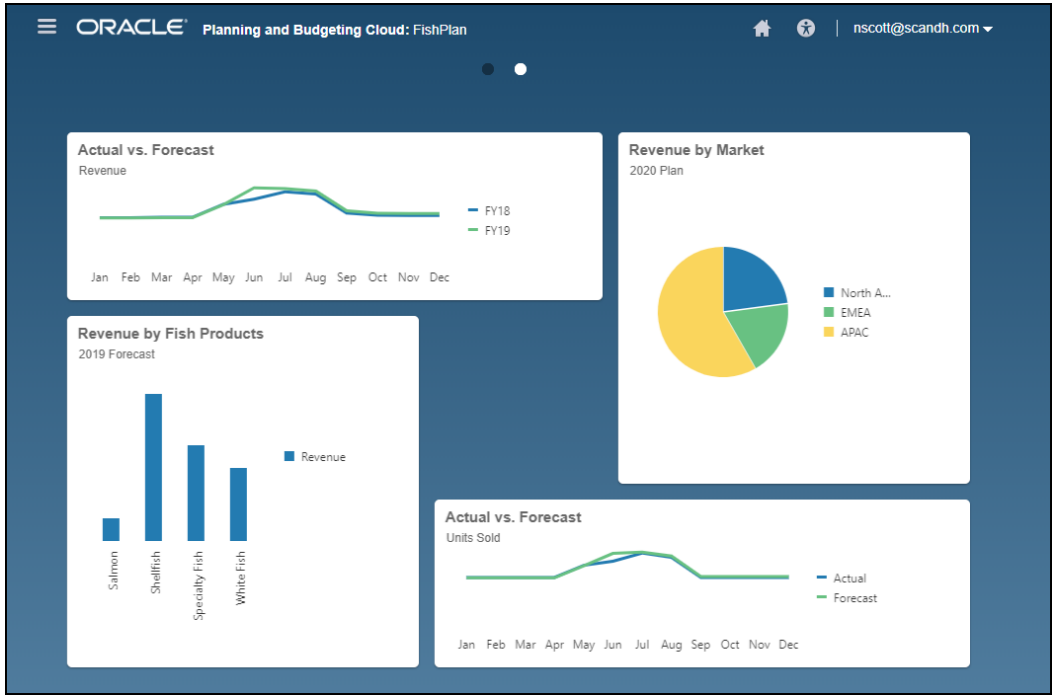
Infolets

- Infolets are another reporting feature in PBCS.
- This type of reporting is great for quick, summarized views of data.
- Infolets can be combined with Navigation Flows to create a second home page so users can get a glance of their data in one place.



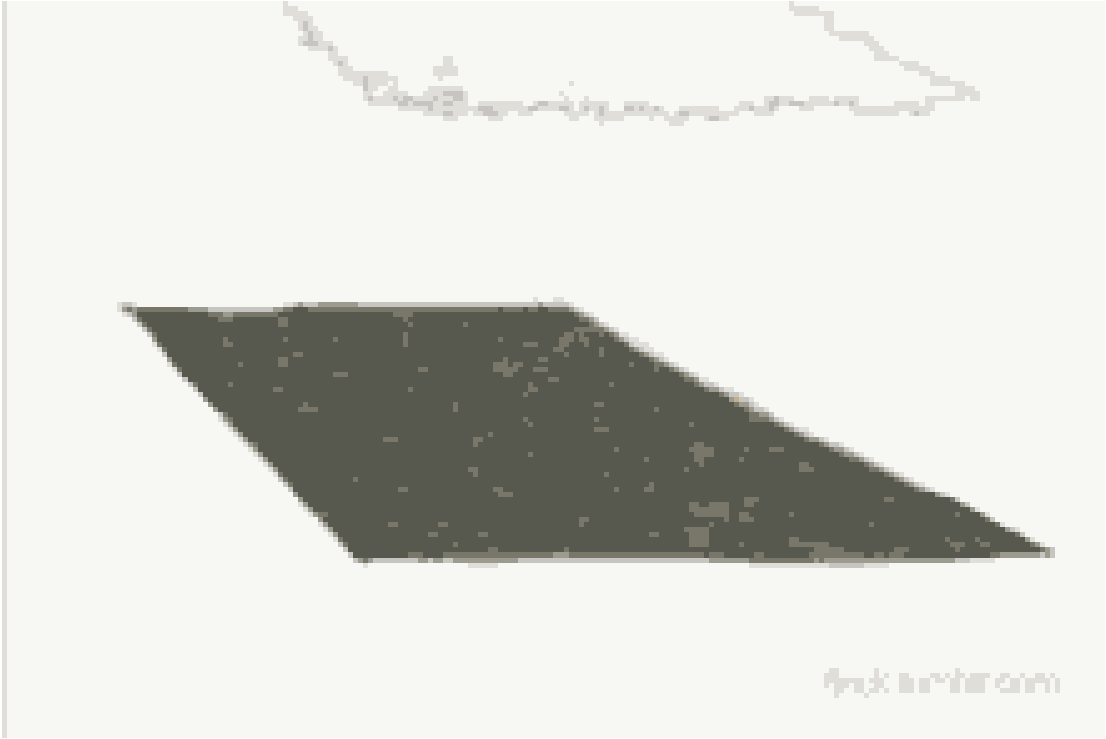
Infolets vs. Dashboards





Wrapping it Up

- Dashboards provide users a chance to tell a story with their data.
- The benefits of dashboards help users make more informed decisions.
- Getting started with dashboards is simple and fun!



Honeymoon:

1. Greece

2. Hawaii

SC&H GROUP

Questions?

Let’s Catch Up

Katie High

Senior

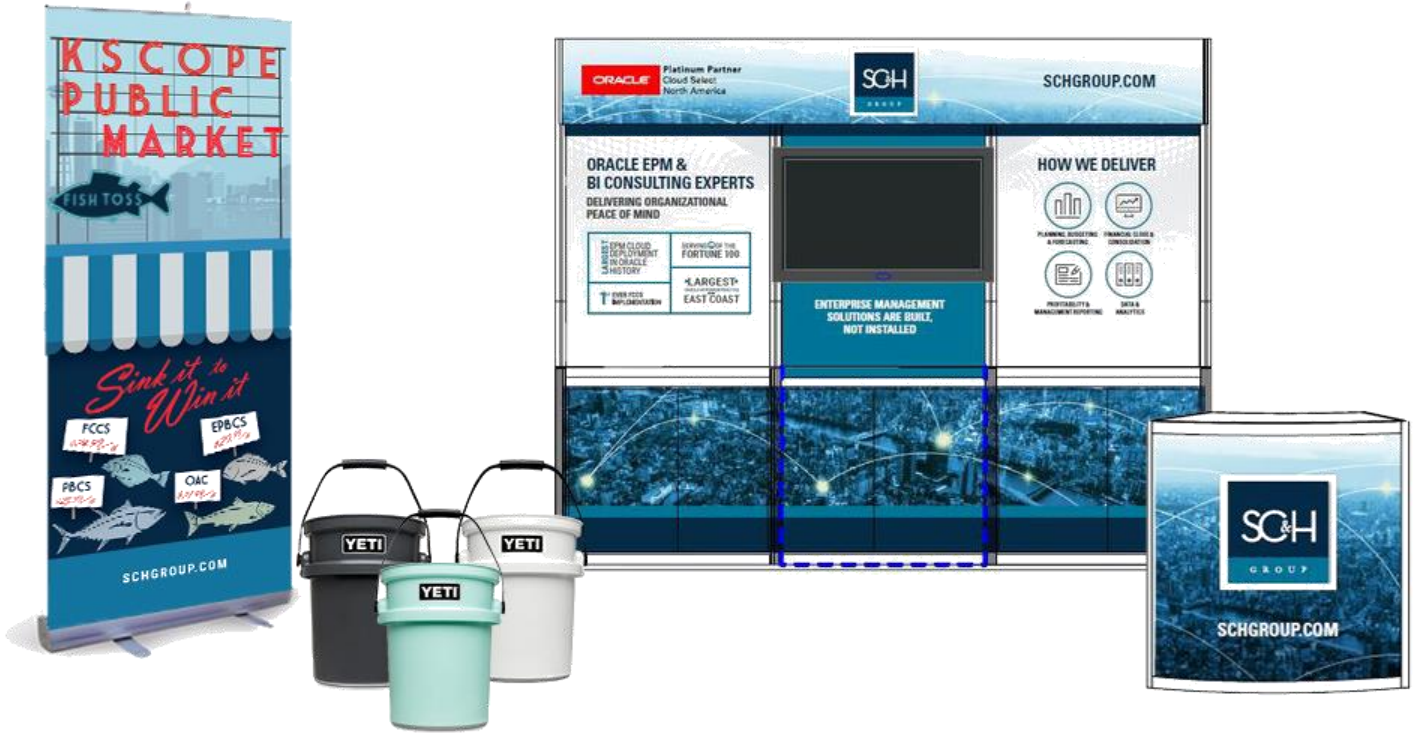
SC&H Group

chigh@schgroup.com

410-988-1380

Stop By and See Us in the Exhibit Hall!

SC&H @ Booth #110



"Live" Fish Toss Contest

Make 3 Shots:

- Win Starbucks Gift Card
- Entered for Chance to Win 1 of 3 Yeti Buckets

Boat Keychains!
Swedish Fish!
Koozies!

I'M SPEAKING AT

ODTUG Kscope19

SEATTLE, WASHINGTON • JUNE 23-27

www.kscope19.odtug.com

SEATTLE

Washington State Convention Center