INSTRUCTIONS FOR USE

PROFESSIONAL DASHBOARD IN MS EXCEL TEMPLATE

Contents

1. Information about dashboard template

Templates of these dashboards have been based on our analysts' long-time experience from multinational corporations. We have put together our experience and know-how and created a simple presentation and monitoring tool. The template has been designed for creating your own dynamic, interactive and clear data presentation of your data, and for close review of your KPIs on one well-arranged page, also known as: business scorecards, dashboards or performance overview.

The template has been designed for MS Excel 2007 and higher. Of course we can build a dashboard for earlier versions of MS Excel or a custom-tailored dashboard (more info at www.sreportings.com).

Our dashboards are typically composed as a "one-pager", meaning that all the significant data is viewed on one page with a possibility of dynamic content.

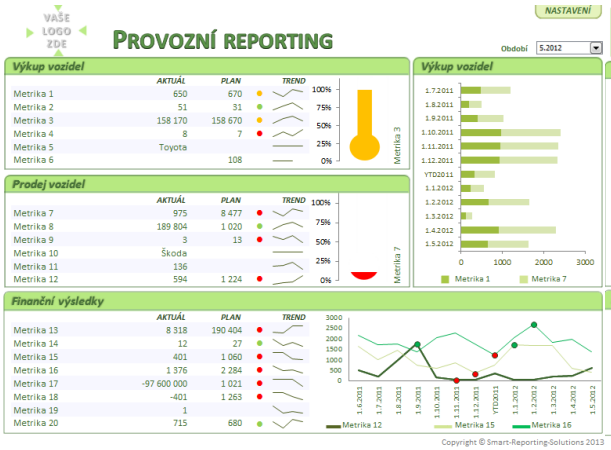
Free visual adjustment according to your needs, e.g. color schemes, logos.

!!! Notice:

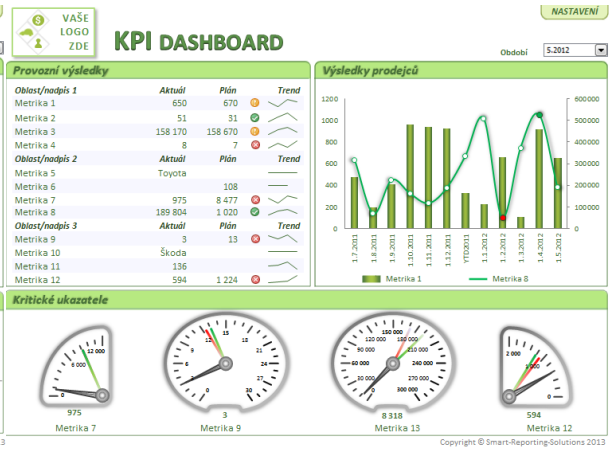
The instructions are presented universally, for all types of templates and all color schemes. This is why the color in the handbook may differ from the one in your final dashboard!

2. Overview of the templates we offer

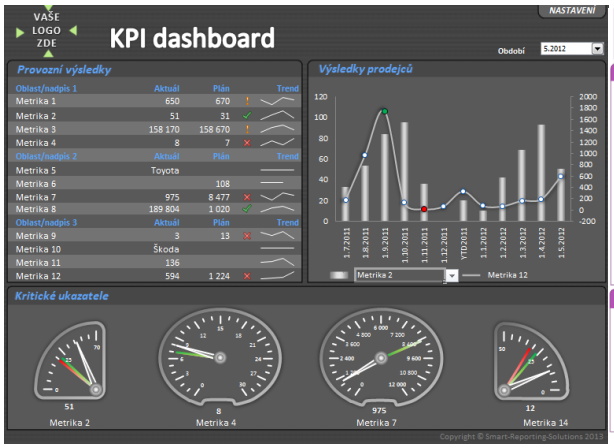
Basic Trio Green



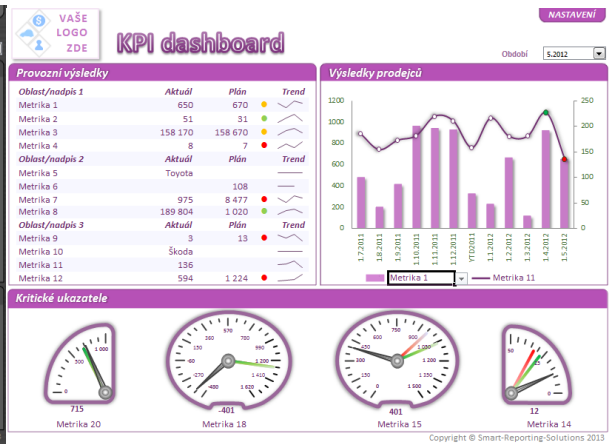
Universal Green



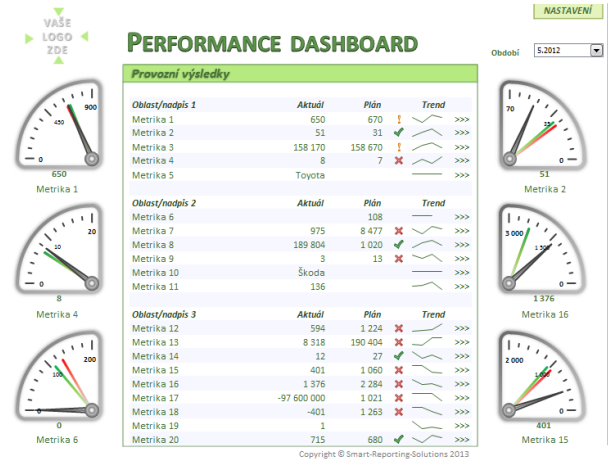
Universal Grey



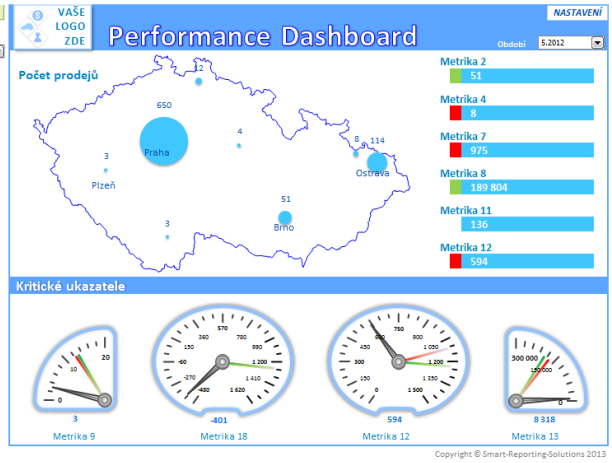
Universal Magenta



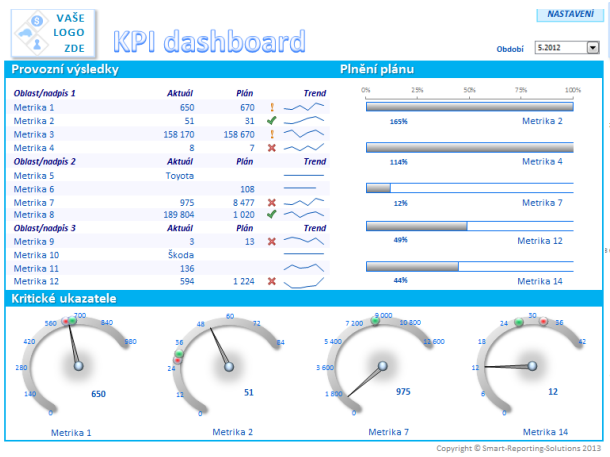
Advanced Green



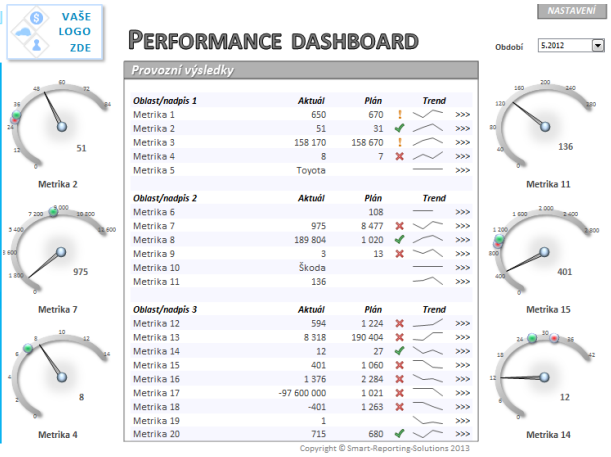
Republic Blue



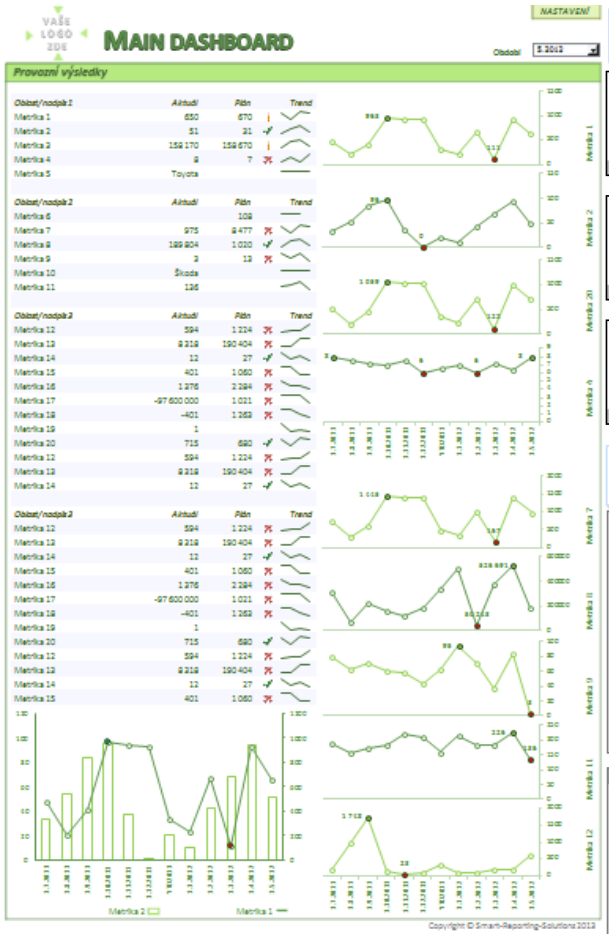
Smart Blue



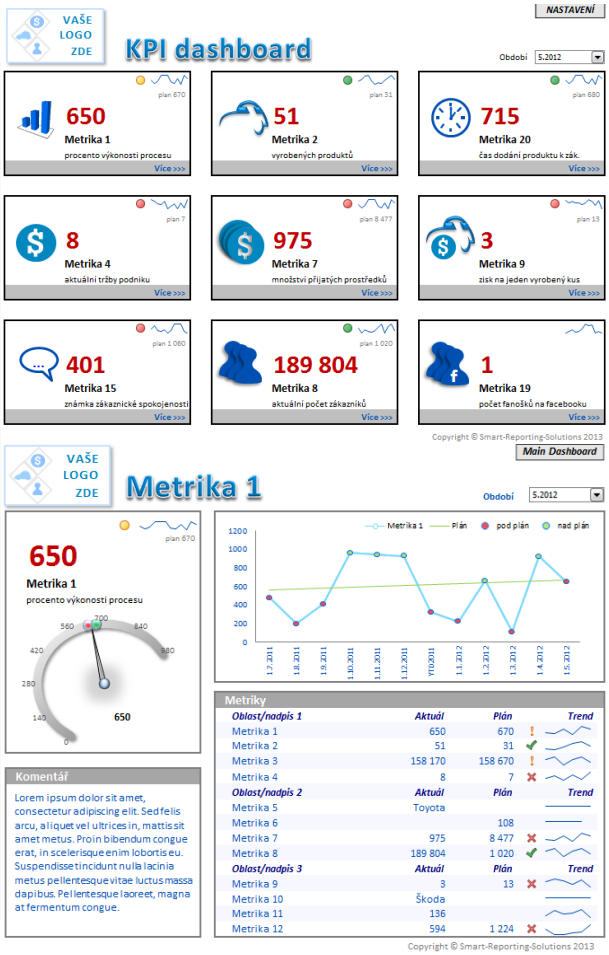
Advanced Grey



Two pager Green



All In One Blue-Grey



3. Setting up the templates, basic commands

Installation/setup is very simple. Since it is a MS Excel book, you only need MS Excel application from Microsoft Corporation. You can save the file anywhere on your local or network drive and run it by double-clicking on the file icon.

Several metrics and sample data are included in the template for demonstrational purposes. You can delete them whenever you feel ready.

Basic Commands

Commanding, administration and general work with our template is very intuitive and simple. You will be able to command it within minutes. Anything can be triggered by a simple click or by entering a value. You can modify the headlines freely and choose metrics for the overall view or for visual presentation into graphs.

Work with the template in 3 stages:

1. Setup names and parameters of the metrics – substantial for displaying the metrics across the dashboard.
2. Insertion of the data and picking the desired period
3. Set the view of the metrics directly in the dashboard and its graphs

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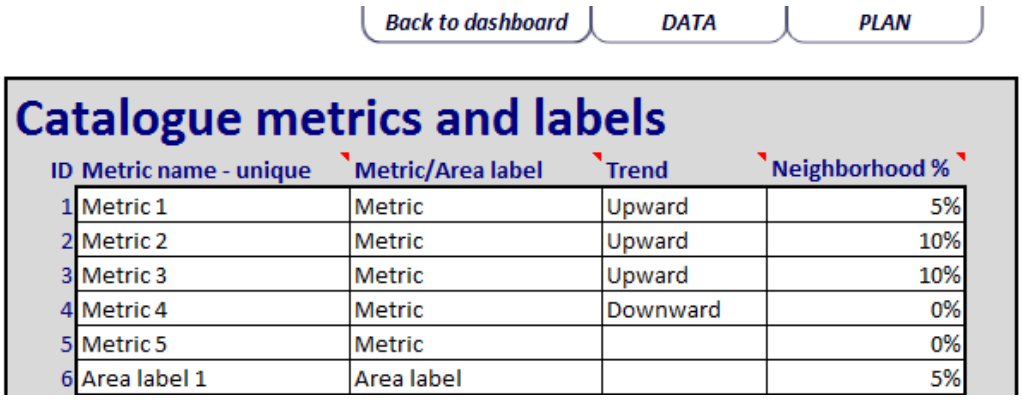
4. Set up the metrics

Before we start working with the dashboard, it is necessary to decide on exact parameters of the metrics. You will find this option on the list "**Setup**". This setup will work upon reset on all lists of the dashboard.

You can setup metrics for more templates, if the templates are from one MS Excel Book.



ID	Metric name - unique	Metric/Area label	Trend	Neighborhood %
1	Metric 1	Metric	Upward	5%
2	Metric 2	Metric	Upward	10%
3	Metric 3	Metric	Upward	10%
4	Metric 4	Metric	Downward	0%
5	Metric 5	Metric		0%
6	Area label 1	Area label		5%

Image 2. Metrics setup

Metrics properties

- **Metric name** – is a **unique** name of the viewed metric. The name you pick then works for all the dashboard, data and plans.
  Notice: In order the dashboard works correctly, it is necessary that every metric has its unique name.

- **Metric/Area label** – Choice of attribute determining whether it is a Metric or Area. If you pick "metric", you will track the metrics performance against a plan, whereas "area label" will be visualized in the dashboard.
- **Trend** – A desired development of a metric's development (e.g. as low error rate as possible, therefore the desired trend is "downward"; revenues should be as high as possible, therefore the desired trend is "upward"). This choice is significant for the visualization of the metrics and graphs (e.g. too high value will be red in the "costs" metric, whereas too high profit will be visualized in green).
  Notice: A metric without any user-set "Trend" is considered "upward" by default. The name of area does not carry or take into consideration this attribute.
- **Neighborhood %** - The percentage of a point marked by orange color distinguishes values reaching but not yet delivering the plan (e.g. "neighborhood" set to 5 %, plan value 100, actual value 96 – the value will be visualized in orange in the dashboard as it is close enough to the plan).
- **Metric description** (only in the "All In One" solution) - simple description of the metric which can be viewed in the main dashboard and serves to explain the significance of the metric.

!!! Notice: If you change the name of the metric, you need to update the metric in the dashboard, in the data and in the graphs' properties (MS Excel characteristic)!!!

5. Work with data

Insert and setup data

The bases of every quality dashboard are data and their history. List "**Data**" is ready for their insertion.

Data SETUP

Metric ID/name / Period	1_Metric 1	2_Metric	3_Metric 3	4_Metric 4	5_Metric 5	9_Metric 6	10_Metric 7	11_Metric 8
1.2011	1_Metric 1	4,10026	361792	6	Škoda	17	556,5	434150,4
2.2011	2_Metric 2	3,49031	182032	6,5	VW	15	1371	218438,4
3.2011	3_Metric 3	2,28381	232833	7	Renault	17	844,5	279399,6
4.2011	4_Metric 4	5,63806	111376	6	Škoda	14	1227	133651,2
5.2011	5_Metric 5	14,4999	344689	7,2	Škoda	15	636	413626,8
6.2011	6_Area label 1	35,62016	313188	6,3	Škoda	11	505,5	375825,6
7.2011	7_Area label 2	33,1475	263457	8	Toyota	11	718,5	316148,4
8.2011	8_Area label 3	53,86171	57392	7,6	Toyota	11	295,5	68870,4
9.2011	411	84,17518	187172	7,1	Peugeot	11	616,5	224606,4
10.2011	963	95,66339	134406	6,9	Audi	18	1444,5	161287,2
11.2011	941	36,44719	97419	7,5	Škoda	15	1411,5	116902,8
12.2011	928	0,162998	157201	6	VW	20	1392	188641,2
YTD2011	326	19,96103	279316	6,5	Renault	13	489	335179,2

Image 3. Data

The Logic of the data inserted is easy to comprehend simple to administer. Each column contains data for one metric and each row contains the specific period. How to work with data in several steps:

1. First pick the period you want to review. Months are chosen in our example. **It does not matter for the final visualization what periods you choose but you need to set the data aggregation accordingly** (everything will be viewed in the menu "period" in your dashboard). E.g. if you choose "months", we aggregate data in every row on a monthly basis, whereas if you choose "week", all the rows will be treated as weekly data.
2. Then you move on to assigning the metrics to their respective tables. You click in the chosen cell and a list of the metrics saved in the "setup" list shows up. Then pick desired metrics into columns in the table.
3. Finally you insert data, following a simple logic: column=metric; row=period. You can do it in several ways:
    1. Basic option is to insert data manually.
    2. You can connect your dashboard with another xls sheet and upload the data automatically
    3. In the optimal case, you connect the dashboard to an external database, which can be done in MS Excel. As this is not a basic feature and it requires advanced knowledge of MS Excel, the procedure is not a part of this manual. However, we can help or advise you on this topic. More at www.sreportings.com.
    Instructions how work with external data connection you can found at www.microsoft.com.
4. **Setting your data in a map** (only in the solution Republic CZ a SK): For inserting data into the map, use the list "Data_rep_CR/SK". The logic of the data inserted is similar as in the previous point. Periods are taken from the list "Data", you pick desired cities in the header, you insert data in the same logic as in the list "Data"(row = period, column = city).

In order to connect the dashboard with external data, sheet "data" is locked. We recommend lock this sheet after setting data connection.

Insertion and setup of plans

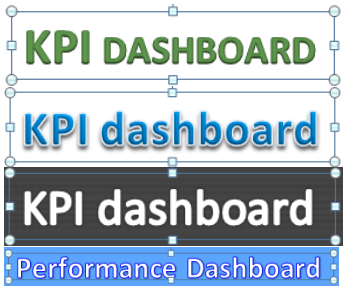
In order to evaluate the extent of how a particular metric meets business expectations, it is necessary to setup plans for each of them. You can set up plans values on the list "**Plan**". The same logic as in list "Data" applies but you do not have to pick the period and metric manually – the plans are linked to the list "Data" and the same setup of periods and metrics is applied for your comfort.

Plans setup is not necessary for the dashboard to be working but we strongly recommend investing the effort and planning out values for all metrics, so as you can easily evaluate the development of the respective metrics.
Sheet „plan" is locked without password.

Notice: If no values for plans are inserted, the dashboard will not apply any visualization of metrics status (green, orange, red) for any of the related metrics.

6. Working with the template

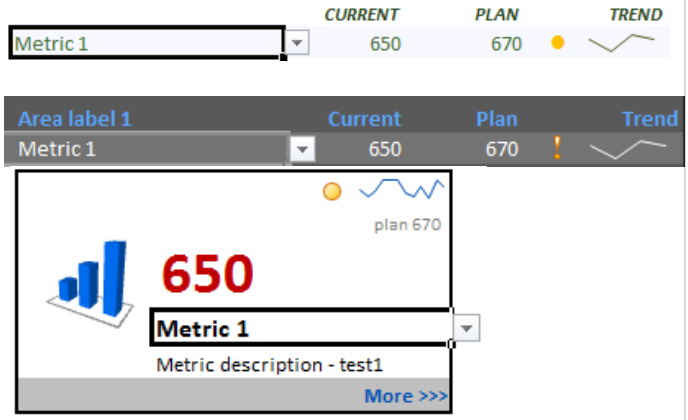
Brief overview of main dashboard elements, description and explanation of their use



Dashboard name
You can change the name simply by clicking in the name area and inserting any text.

Area label / dashboard field
You can change the name simply by clicking in the field and inserting any text.

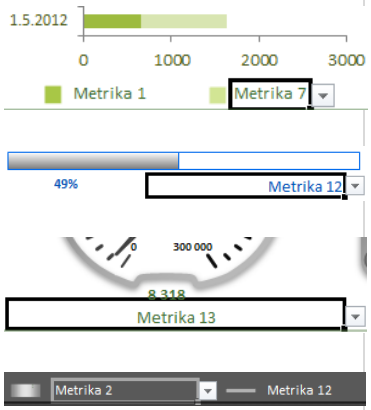
Period:
A very important element of the dashboard! By adjusting the period, you change the data currently viewed.



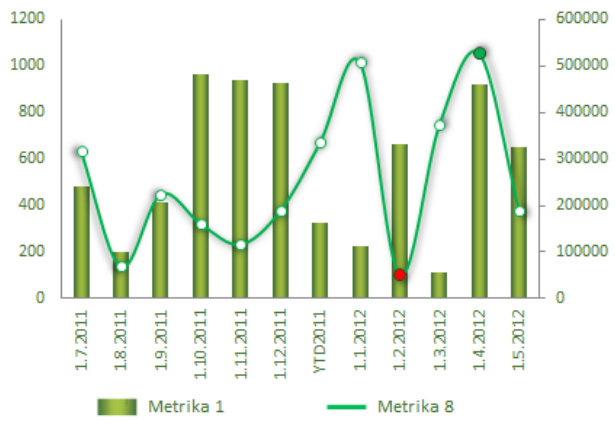
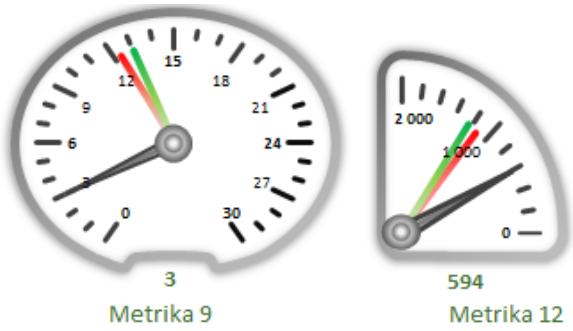
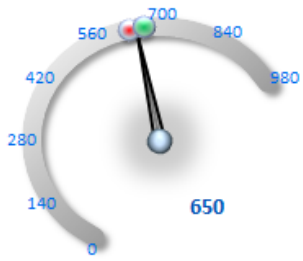
!!!Notice:
!!!Trend does not show, if you are viewing the very first period
!!!Actual and Plan do not show up, if no values are inserted into the lists "Data" and "Plan".
!!!Graphical symbol does not show, if no values are inserted into the list "Plan".

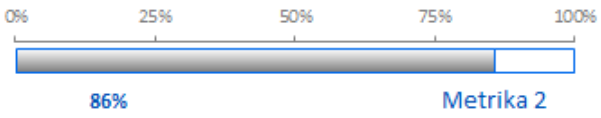
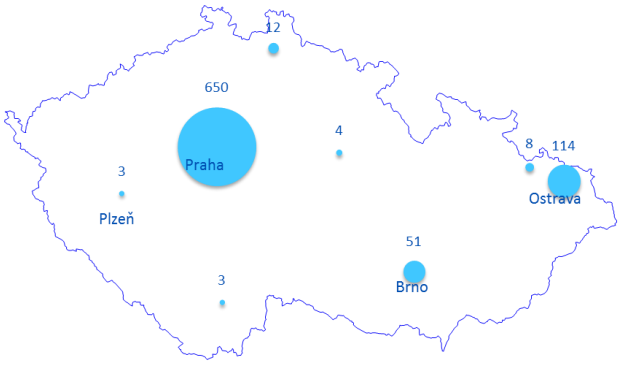
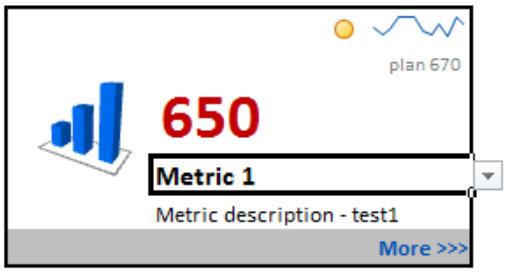
Choice of metric / area label
A field with a list of currently setup metrics (from the list "Setup") rolls down upon clicking on the metric cell. After you pick your desired metric, other elements load automatically. If you choose a metric, you will get symbols visualizing the development of the metric next to the "Current" and "Plan" fields, and values from last four periods show up in the "Trend" field.
If you pick a label of an area, other fields, show Current, Plan and Trend, and the entire row formats according to the dashboard template.
!!! Notice: If you change the name of the metric, you need to update the metric in the dashboard, in the data and in the graphs' properties (MS Excel characteristic)!!!

Metric status visualization
Symbol demonstrating comparison of current metric value with its plan value in the chosen period.
Green – metric value follows the desired pattern, i.e. the plan is delivered (if any plan value is inserted)
Orange – current metric value is close to the plan value (this color only shows if "Neighborhood %" is set in the list "Setup"
Red – plan is not being delivered (if any plan value is inserted)
Notice: Visualisation of status depends on the desired "Trend" (upward / downward) setup, which determines the desired values in relation to the

	"Plan", e.g. a cost value too high will be visualized as red but a revenue too high will be visualized as green.
	**Metrics setup for Graphs** Metrics presented by each graph can be easily setup. You simply click on the name of metric label by the graphs and you can pick the desired metric from the roll-down menu. This applies for all the graphs used in our templates.

Graphs - explanatory notes

	**Column/line/combined graph** Visualizes the development of metrics in last 12 periods from the current period. Graphs dynamically adjust, as you can change the current period. Minimum and maximum values are highlighted (red and green points on the curve).
	**Speedometer** Visualizes current status of the selected metric. It is used for a closer view of key metrics. *"How fast does the metric go?"* *Notice: If no plan values are set, no pointer depicting the plan value shows, and neither does the pointer depicting the "neighborhood". If no "neighborhood" is set, only the green pointer depicting the plan value shows.*
	**Speedometer** Visualizes current status of the selected metric. It is used for a closer view of key metrics. *"How fast does the metric go?"* *Notice: If no plan values are set, no pointer depicting the plan value shows, and neither does the pointer depicting the "neighborhood". If no "neighborhood" is set, only the green pointer depicting the plan value shows.*

	**Bar graph** This graph show fulfillment of a plan as a percentage. It is calculated as a fraction “actual value / plan value“
	**Thermometer** This graph show fulfillment of a plan as a percentage. It is calculated as a fraction “actual value / plan value“. The colors change dynamically based on the current metric status.
	**“Republic“ graph** A very interesting and sophisticated view showing the ratio of values contributed by specific regions. Various quantities, such as number, Kč or percentage may be used.
	**“All In One“ metric visualization** This is not a graph *per se* but a way of professionally visualizing your key metrics. including illustrative images for the issues viewed (you can choose the images freely). Each metric contains an interactive reference onto the metric details. The detail is able to view other related metrics as well.

7. Saving the file in PDF

Click “File / Save As“ and pick the PDF type in the “Pick as type“ pop-up menu.

8. Information about authors

Smart Reporting Solutions is a team of skilled consultants with long-time experience in the services sector (reports design, process optimizing) and software developers (design of professional reporting tools and minor applications with a focus on processes automation.

We help our clients to improve their business by in-depth analyses and by using proven reporting tools.

The value-added of our methods is among others an efficient evaluation of key indicators as well as considerable time- and cost-saving effects and increased productivity while maintaining at least the same quality of our products and services.

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