



Module 6

Process, Architecture and Requirements

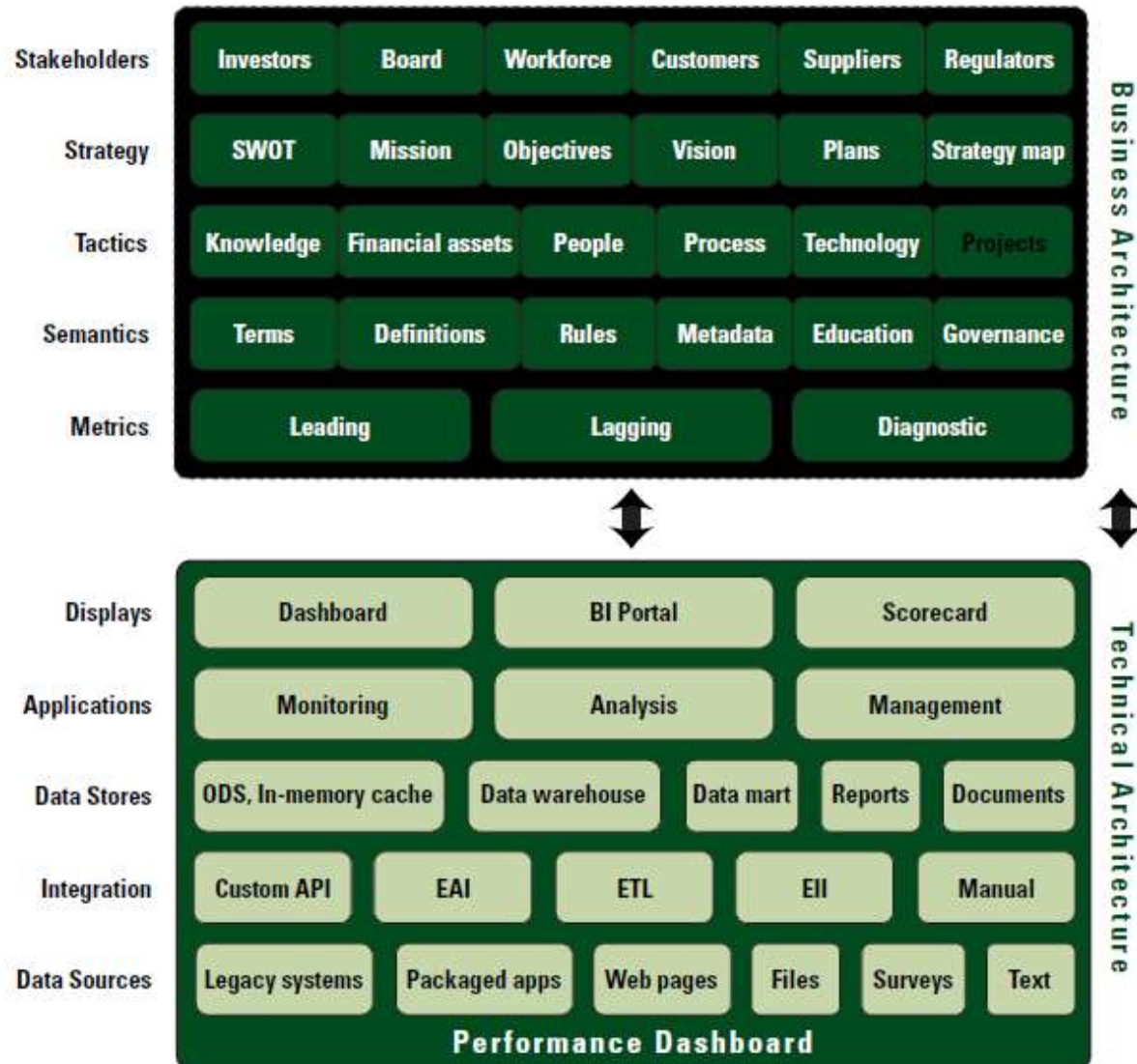


Design process

- **What effective design provides for users**
- **Typical design progression**
- **Features affecting how dashboards are designed**
- **Top checklist items for designing dashboards**
- **Status of dashboard design**
- **Process for designing a dashboard**
- **Best way to architect dashboards and scorecards**

Figure 10: Business architecture

Architecture of Performance Management System



Business and technical architecture

■ **Business architecture**

- Basics of the business architecture
- Importance of KPIs and metrics
- Targets
- Thresholds

■ **Technical architecture**

- Components of the technical architecture
- Architecting performance management systems

Objectives and users

- **What objectives should reflect**
- **Business users' perspective**
- **Determining end user needs**
- **Key groups participating in creating a dashboard**
- **Designing a dashboard as an effective BI tool**

Basic functional requirements

- **Main user requirements for designing a dashboard**
- **Basic requirements**
- **User action requirement**
- **Presentation and display requirements**
- **Output and distribution requirements**

Basic questions for determining requirements

- **Optimizing for the organization**
- **Common aspects to be considered for all dashboards**
- **Common technique used to determine requirements**
- **Key objective questions that need to be asked**
- **Key questions regarding metrics**

Determining requirements (continued)

- **Questions regarding responsibilities and user actions**
- **Questions pertaining to views**
- **Questions pertaining to monitoring frequency**
- **Questions pertaining to security**
- **Technology and environment questions**

Design questions

- **Key design element pertaining to users**
- **Prerequisite for identifying metrics**
- **Key dashboard design requirement questions**
- **Data to be displayed**
- **Placing data: Where and how**
- **Types of interactions to be supported**
- **How data should be presented** (See section titled “Data presentation options” (Module 9))