



Forest Grove
Data-Driven Decision Making

Optimising technology to
unlock insights that drive
better business decisions

Forest Grove Customer Conference 2023

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[D1S5.1] Prophix Training: Dashboard Studio - creating meaningful visualisations

Presented by:

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About the session:

Wouldn't it be great to have a dashboard with decision-ready information when you log in to your Prophix application? Join us as we show you how to transform your traditional style of reporting and analysis into eye-catching visualisations that are easy to interpret and provide meaningful and impactful insights. In this session, you will gain hands-on experience in Dashboard Studio. Led by our experienced FP&A consultants, you will learn how to create Prophix dashboards with user specific charts, geo-maps, and other data-rich tiles.

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What Dashboard have you got ?

The screenshot displays a dashboard interface. At the top left, there is a 'Dashboards' header with a cube icon. The main content is divided into two primary sections: 'Welcome Dashboard' and 'Prophix Online Help'.

Welcome Dashboard:

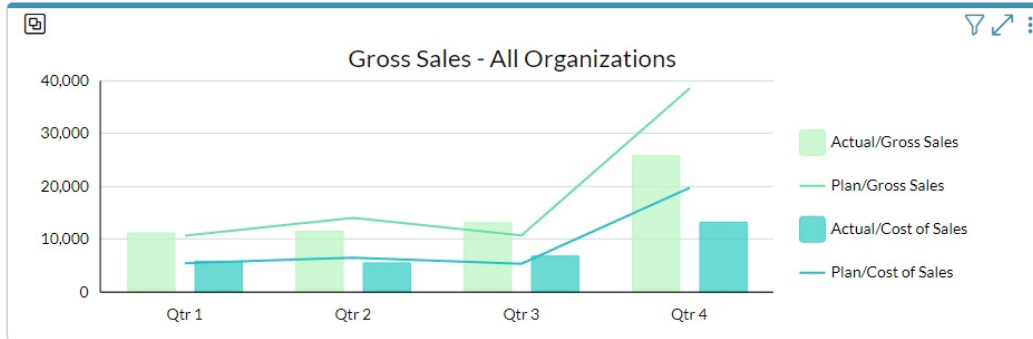
- Announcements:** A section with a megaphone icon and the text 'No Announcements'.
- Did you know...:** A card with the text 'Earthworms have 5 hearts'.
- Fun Fact:** A card with the text 'A bear has 42 teeth'.

Prophix Online Help:

- Header:** 'Prophix Online Help' with the Prophix logo and a hamburger menu icon.
- Section:** 'Prophix Cloud Help' in red text.
- Search:** A search bar with the placeholder text 'Search' and a magnifying glass icon.
- Navigation Cards:**
 - What's new:** Features a megaphone icon and the text 'New or improved in this release'.
 - Get started:** Features a rocket icon and the text 'For those new to Prophix'.
 - Basics:** Features a bar chart icon and the text 'Getting things done'.

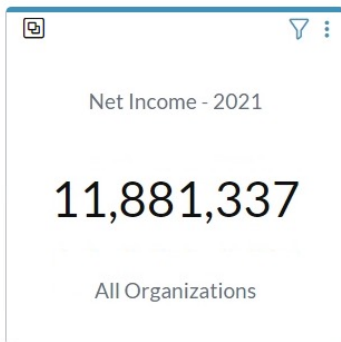
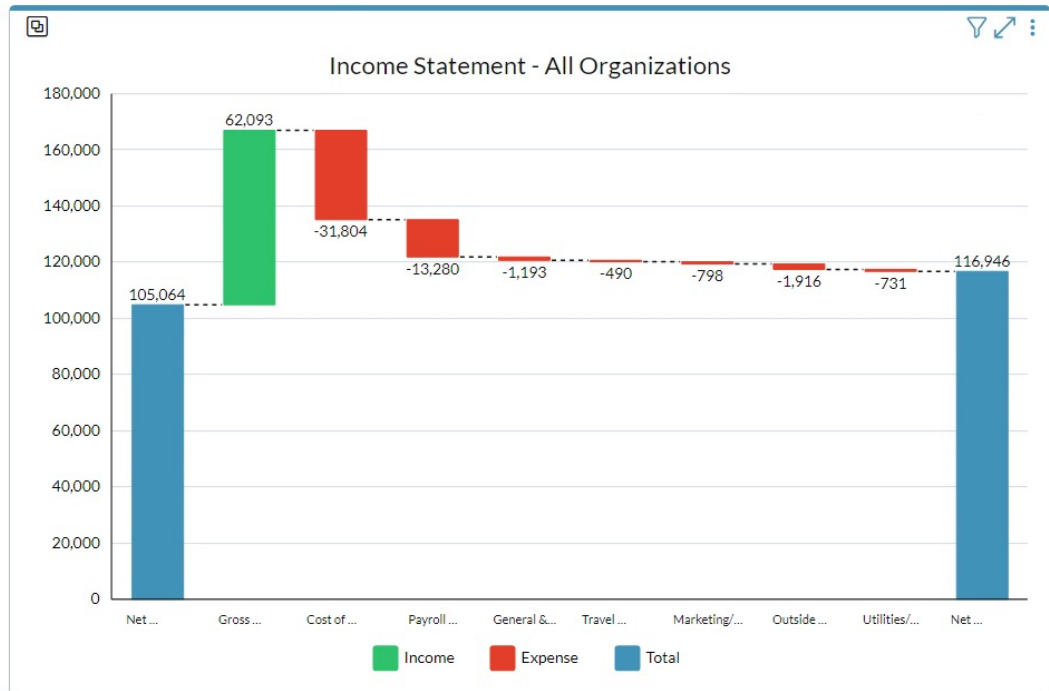
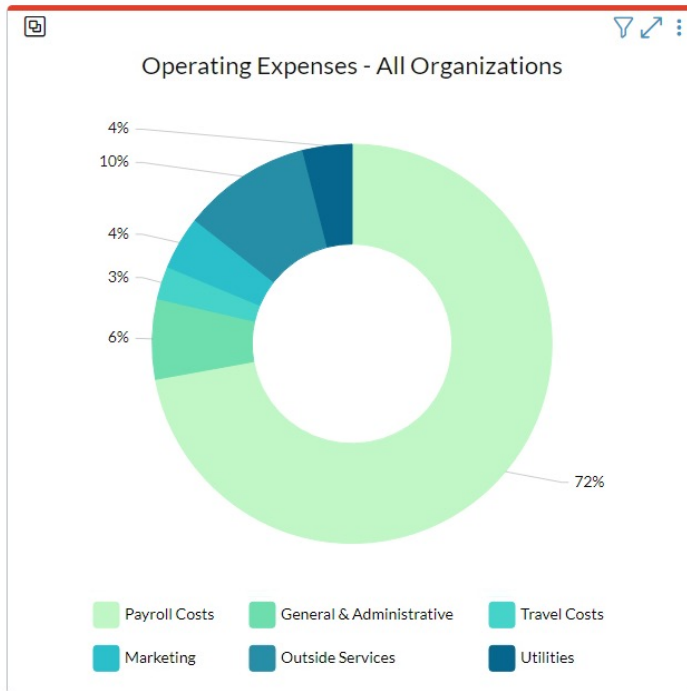
How about this one?

Finance CC Dashboard



My Favorites

- AWCG Financial - P&L Analysis
Date added: Nov 11, 2014
- LOB Comparison Report
Date added: Nov 11, 2014
- Reports & Templates
Date added: May 4, 2015
- Revenue by Product Line
Date added: May 4, 2015



Why you need a Prophix Dashboard

- Quick snapshot of the KPIs.
- Connected services - Review financial and non-financial information from different data sources.
 - Human force
 - Chris21
 - 2Cloudnine
 - Epicor
- Foresee future challenges – Example: cost overrun, outliers
- Slice and dice or drill across
- Quick access to favourite reports and workflows

Important things to consider

- What KPIs do I need in my Dashboard ?
 - Industry
 - Institute
 - Organizational hierarchy
- Flow of information
- Keep it simple
- How to build it in a meaningful manner
 - Data view
 - Tile type

Let's build a dashboard

<https://cloud.skytap.com/vms/f61740bc30ecfb83a4c64ecaf7297293/desktops>

User name: mrobin
Password: Prophix1

Introduction to Dashboard Studio

Finance CC Dashboard



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