Best Practices

Most of our other help documents are intended to address “how-to” questions. For instance, “How do I create a new metric?” In contrast, this article is intended to address “what-to-do” questions. It’s geared toward new admins who may be uncertain about how best to organize their Metric Insights instances. By following the advice in this article, we believe that you will:

- Minimize time to value
- Build-in flexibility to facilitate future changes
- Drive adoption by end users

Starting Out

Metric Insights is designed to provide flexibility and ease of use for the end user. Users can customize their Favorite folders so that they can focus on the elements that are most important to them. That suggests that you adopt an attitude of “the more, the merrier.” Indeed, we hope you'll wind up with a large collection of elements, but a scatter gun approach is probably not the best way to start. You’ll soon learn that useful collections of tiles don’t just materialize by accident. As Rodney Dangerfield said, it’s not pretty being easy. You’ll need a good strategy.

We suggest that you start with Metric Insights' Push Intelligence features in mind. What information do users want to receive every day? These are likely to be high-level KPIs (i.e., metrics) such as 'Daily Sales'. That's a good place to start. Once these high-level KPIs are in place, you'll be able to set up Daily Digests, which is a great way to begin engaging your users.

Do you occasionally receive valuable information that has a limited shelf-life? If so, then you'll want to set up data-driven Alerts or Report Bursts so that this information can be pushed out to users in a timely manner. We suggest that you focus on Alerting and Reporting early during your implementation. Delivering valuable information to the right users at the right time is one of the best ways to drive adoption of Metric Insights.

Metrics

What gets more attention: the top-line sales result, or the details of what was actually sold? Build metrics first, because that's what users will want to see first. Also, in hierarchical families of tiles, metrics often live at the top. They are therefore natural starting points for developing collections of interrelated tiles. Finally, metrics are easy to build -- if you make mistakes or build some that you don’t need, you won’t have wasted much time. Other aspects of your Metric Insights implementation will require more effort, but metrics are easy so it pays to get a basic set on the board early in the game.

Start with un-dimensioned metrics. They require the least amount of planning. Simple metrics are easy to think about, while dimensioned metrics may seem daunting and actually do require some planning. Also, un-dimensioned metrics are the raw materials for dimensioned metrics; keep them around, even if you're not planning to display them on the home screen.

- How to build a metric
- Understanding how dimensions work
- How to create a dimension

Reports

Planning will really pay off here, especially for reports that are intended to provide drill-down detail for other elements. Start by planning your drill-paths. What questions will your top-level metrics inspire? Where do you want them to lead? When you answer those questions, you will have identified many of the reports that you'll need to create.

As with metrics, start with un-dimensioned reports. Even if you're not planning to display them, they'll serve as valuable concrete examples of what you really need to build. (Keep in mind that not all reports need to be on your home page. In some cases, reports will be accessed primarily by drilling down from other elements.)

Things to keep in mind when building reports: If a report will be accessed by drilling from another element, what parameters will be passed by the other element? If the other element is dimensioned, the report will need to be dimensioned in the same manner.

Think of a report as a chapter in a larger story. Don't try to tell the whole story in one chapter. Keep it tight and concise, and leave the rest of the story for other chapters.

- When to use a report or a metric
- How to build a report
- Drilling

Pivot Tables

If a report is a chapter in a larger story, then pivot tables are paragraphs. They're used to organize report data into smaller chunks in order to make one or two concise statements. Sometimes you'll be lucky and will be able to create useful charts directly from the raw data that you've gathered into reports. More often than not, however, you'll need to reorganize the data into pivot tables in order to get the full value out of it.

For instance, if the raw data in your report includes columns for Month, Sales, and Product Type, you might use a pivot table to create a two-dimensional table using Month as the row label and Product Type as the column label. The table could contain an aggregate measure of sales such as Total Sales or Number of Sales. The table could stand on its own as a component of your report, or if you like, you could use it to create, say, a stacked bar chart showing Total Sales by Month, broken out by Product Type.

- Create a Pivot Table in a Report

External Reports

One of Metric Insights' great strengths is its ability to serve as a central portal for reports that you've created with other business intelligence tools. (Believe it or not, metric Insights isn't always the best tool for your reporting needs!) Perhaps you've accumulated a rich set of Tableau or Qlik Sense reports. Consider publishing them in Metric Insights as External Reports. There are several benefits associated with this:

- All of your reports can be found on one place
- Users can add notes and expert commentary to reports
- Reports can be pushed out to users via daily suggests and data driven alerts

We've created wizards to help you integrate Metric Insights with some of the most popular business intelligence tools. Among other things, the wizards enable you to publish an External Report and connect it to the alerting mechanism, all in one simple process.

Categories and Topics

By the time you've created half a dozen metrics and reports, you'll want a way to organize them. That's where Categories and Topics come in. Categories and Topics can be used to:

- search for specific elements that may be of interest
- find other elements that are related to the one you're looking at
- organize your home page

A well-designed system of Categories and Topics will significantly increase the utility of your Metric Insights instance. When information can easily be discovered and interpreted, it’s more likely to be used.

Create a Category (Version 4)

Alerts

Now and then, every business comes into possession of time-sensitive information. Metric Insights can help you deliver that information to the right users at the right time. You'll be a hero if you can do this successfully, so it's worthwhile to develop a good alerting strategy.

Alerts are triggered by metrics, so you'll need a metric for every alert. Depending on the data source, however, you might first need to create a snapshot report to serve as the basis for your metric. If so, then you'll want to think this through carefully. Snapshotting can be tricky -- you can waste a lot of time on wild goose chases.

When your alert is triggered, do you want users to receive the metric? Or do you perhaps want them to receive a report containing details about the underlying cause of the alert? Sometimes, it's not enough to know that some KPI has exceeded your alert threshold. If you need to know why it exceeded the threshold before you can take action, we suggest that you create a suitable report and connect it to your alert.

Several steps are required in order to set up alerts. You'll need to:

- Setup email
- Create a Simple (Undimensioned) Metric
- Setting up your Alerts (Version 4) using Alert Editor

Once everything is in place, users can easily opt-in to receive alerts by updating their Alert Subscriptions. They can also create their own custom alerts.

Enabling alerts requires a few steps but we highly recommend that you take advantage of this capability -- it's at the heart of the Push Intelligence value proposition.

Shared Favorites

Another way to ensure that end users are seeing the right information is to use Shared Favorites. Any admin can set this up. Just create a new Favorites folder, place some key elements in the folder, and then share it with one or more groups within your organization. The new Shared Favorites folder will appear on each group-member's home page and will include all of the elements that you've inserted (assuming that the members have permission to see those elements). This will help to ensure that users are seeing the information that is key to running your organization.

- Add (or Delete) Elements to a Favorites folder (Version 4)
- How to share your Favorites folder (Version 4)
- How to create a new group

Once the new Shared Favorites folder is in place, group members can Request a 'Daily' Favorites Digest (Version 4) of the new folder. This will provide users with direct access to your key metrics and reports, right in their in-boxes. We encourage you to inform your users about this feature - we believe it's one of the most powerful ways to drive adoption of your Metric Insights instance.

Events and Annotations

Now that you've got the attention of your end users, you'll want to provide some context so that they can better interpret what they're seeing. That's where Events and Annotations come in. Both are used to enrich metrics by permanently attaching notes at specific points in time. Annotations are attached directly to metrics while Events are typically entered in Event Calendars, which are then overlaid on entire families of metrics. Any user with appropriate permissions can create Events and Annotations but Events are particularly well suited for central management by admins.

Does your company offer periodic promotions? If so, then consider creating a 'Promotions' calendar and applying it to metrics belonging to the Sales category. Promotions will then be highlighted on all of your Sales metrics. Users will immediately gain a better understanding of any fluctuations they may observe in your Sales statistics. And by clicking on the Event icons that appear on the charts, they'll be able to get detailed information about specific Promotions.

Events and Annotations are core aspects of the Push Intelligence value proposition. We encourage you to embed them in your Metric Insights application.

- Add an Annotation (Version 4)
- How to create an event calendar
- How to create an event manually or Source Events Automatically

Driving Adoption

The suggestions above should put you on the path to a successful implementation of Metric Insights. Just for good measure, here are few more suggestions to help drive adoption.

Use the Description sections in the various editors. The descriptions will show up wherever the components appear. This will help to inspire confidence among your users. It will also help to reduce questions to administrators.

When end users do have questions, you'll want to make sure that they can get answers. In those cases, it's usually best for the user to talk directly to the business or technical owner of a given element. Be sure to assign a technical owner and a business owner to each element or group of elements so that users know whom to talk to when they need more information.

If your company is like most, you'll soon wind up with a large collection of metrics and reports. At that point, you may find yourself with a new challenge, namely, a proliferation of redundant, poorly defined elements, many of which have effectively been abandoned by their creators. You'll want a strategy for pruning these elements, so that your instance remains useful, appealing, and reliable.