

# 5 Down & Dirty Tips for Clean Data Dashboards



## **Brey Neville** *Senior Technical Support Engineer @iDashboards*

*Brey Neville has been a pillar of support at iDashboards since 2012. Since his start, he has gained a foothold by not only providing reinforcement to customers in need of a solid footing with the software, but also been an abutment for internal employees who need a brace. Outside of work, Brey is the cornerstone for his family as they continue to lay the foundation for their lives.*

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Data dashboards are only successful if the data within it is organized, clean and accurate. So we've synced up with our awesome staff and customers to gather their top clean data tips for dashboards.

# 1. Check for duplicates



With tools like the [Data Integrator](#), you won't need a magnifying glass to de-dupe your data.

*"Clean data does not contain duplicates," Jereme M.,  
Technical Support Engineer, iDashboards*

Dashboards can help you reduce redundancies in your reporting and help you pinpoint duplicates. If you're at the grocery store and the clerk rings you up twice for the same item, you would stop them to let them know they are charging too much. In much the same way, duplicate data can skew your numbers. [Accurate, reliable and timely information is vital to effective decision-making in almost every aspect of human and business behavior.](#)

# 2. Ask & answer the right questions



You shouldn't have to search for your KPIs – bring them into the conversation!

*“Is this data important to your audience? Is it actionable? Does it drive the right behavior?” Nate G., Enterprise Account Representative*

KPIs (key performance indicators), if they aren't already, are the peanut butter to your jelly and the spaghetti to your meatballs. They're the tools you need to dictate the health of your business. Keep it simple by combining KPIs that are similar. Choose the story you want to tell by using KPIs that show the bigger picture of your overall performance.

### 3. Be completely consistent



Consistency is crucial in many things... especially data and peanut butter.

*“Complete and consistent records with unique identifiers and proper indexing,” J.F. Keily Group, Sr. Systems Analyst.*

Now that you have chosen your KPIs, the next step is figuring out proper filters and drilldowns. **Group particular interests** together in order to keep your information organized. Just as your reports have done in the past, your dashboard should tell a similar story. This technology can do much more than an Excel spreadsheet, but it’s only effective if you organize and relay it correctly. For best practice, try not to use more than three levels of drilldowns. But most importantly, **keep all information uniform as it moves across a network and between applications.**

**PRO TIP:** Make sure to double check that you’re being consistent with your data like constantly using “Jan.” instead of “January”. By removing duplicates and

maintaining consistency, you'll keep your reports more accurate.

*Keep the end in mind when building your #dashboard. #goals #designbestpractice*

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## 4. Make it repeatable



*"The formatting should be easily repeatable, if you have to manually keep changing the format every time the data is pulled, you don't have a good data set," Marisa P., Enterprise Account Executive.*

Keep the end in mind when building your dashboard. Good, clean, consistent, accurate data is one step. Building reports is another. Keep your reports consistent with the story your business wants to tell. **Data clutter can actually hinder your reporting process.** Yes, making changes in the future is simple, but do keep the end in mind when changing the format. As your business grows,

maintaining your message and goals of the company will improve as well. If your KPIs aren't change significantly, neither should your reporting.

## 5. K.I.S.S. – Keep It Simple, Silly



*"Don't try to make your data pretty, take the extracts or connect directly to the DB," Stephen M., Account Executive.*

Dashboards can look like an elusive unicorn when it comes to the graphics. If the graphics don't tell your data's story, then it's **back to the storyboard**. Good data will give you good reports. If you're learning how to dance for the first time, you aren't concerned with doing fancy spins and flipping in the air; get the basics down first, then you can add all of the flairs, twirls, and more. Think of your data in the same way. Lay the foundation down to exactly how it makes sense to your company, then add all of the bells and whistles you want. A dashboard has a lot of capabilities to be aesthetically pleasing, and it can be the most glorious thing you've ever

seen, but make sure your data is accurate and set up well first.

*“Format your Excel data source so it is only column and rows, and avoid nulls if you can,” Jereme M., Technical Support Engineer*

Dashboards can integrate all kinds of applications. However, the simplest is an Excel document. Cleaning data is as simple as organizing, filtering, and deleting. Data in its purest form is simply values and numbers. Finding the duplicates within a plain old spreadsheet will save you from having to understand new technology and give you peace of mind that the right information is uploaded to your dashboard.

*“In Excel, clean data includes thinking about your column headers. Blank spaces and special characters should be avoided and plan to use simple and concise header names.” Brey N., Senior Technical Support Engineer*

After all, is said and done – consistent, clean data is the way to go when integrating a dashboard into your business. Take the time to make the information right the first time before bringing your staff on board.

***Consistent, clean #data is the way to go when integrating a #dashboard into your business.***

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Our staff at iDashboards are pros. They deal with data day in and day out. If you're still struggling with clean data, check out our free Excel Data Integrator add-in, take advantage of the **iDashboard Data Integrator** or **test drive iDashboards for free today.**

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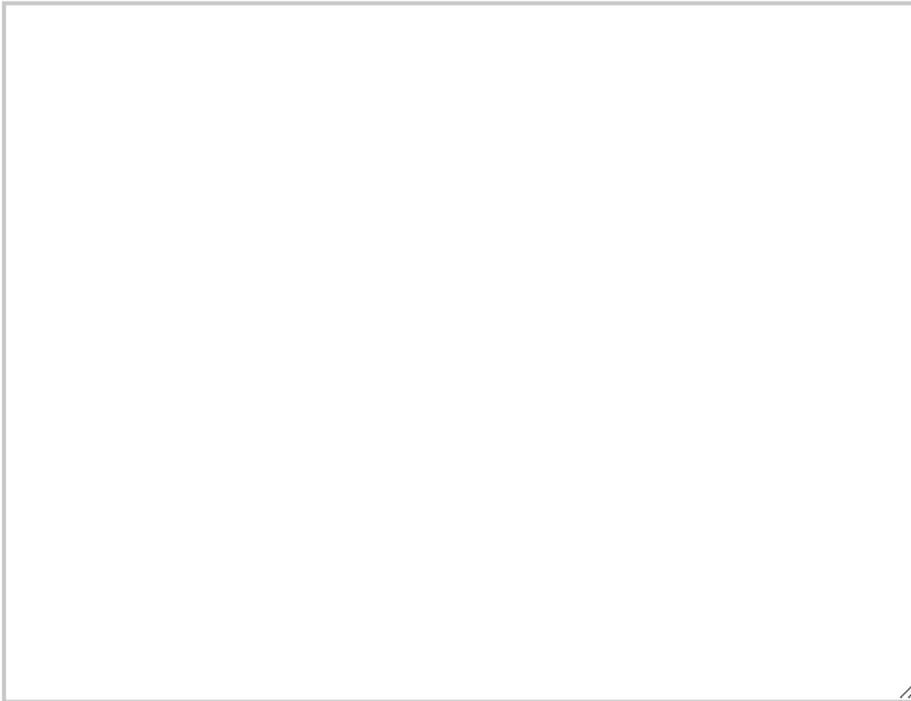
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