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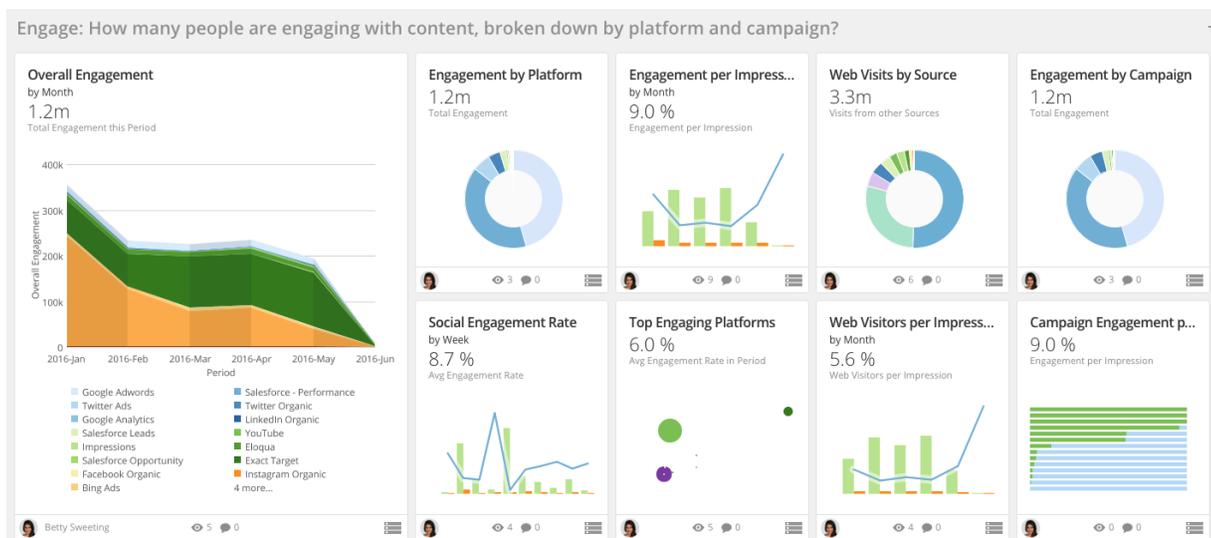
Best Practices for Creating Cards, Card Collections, DataSets, and DataFlows

Collection Best Practices

Each page should be organized into collections that:

1. Are titled and apply to a specific business question.
2. Contain a more detailed description of why the collection exists.
3. Contain a "Hero Card," or a larger card that answers the high-level business question.

Example:



Card Best Practices

Each card should do the following:

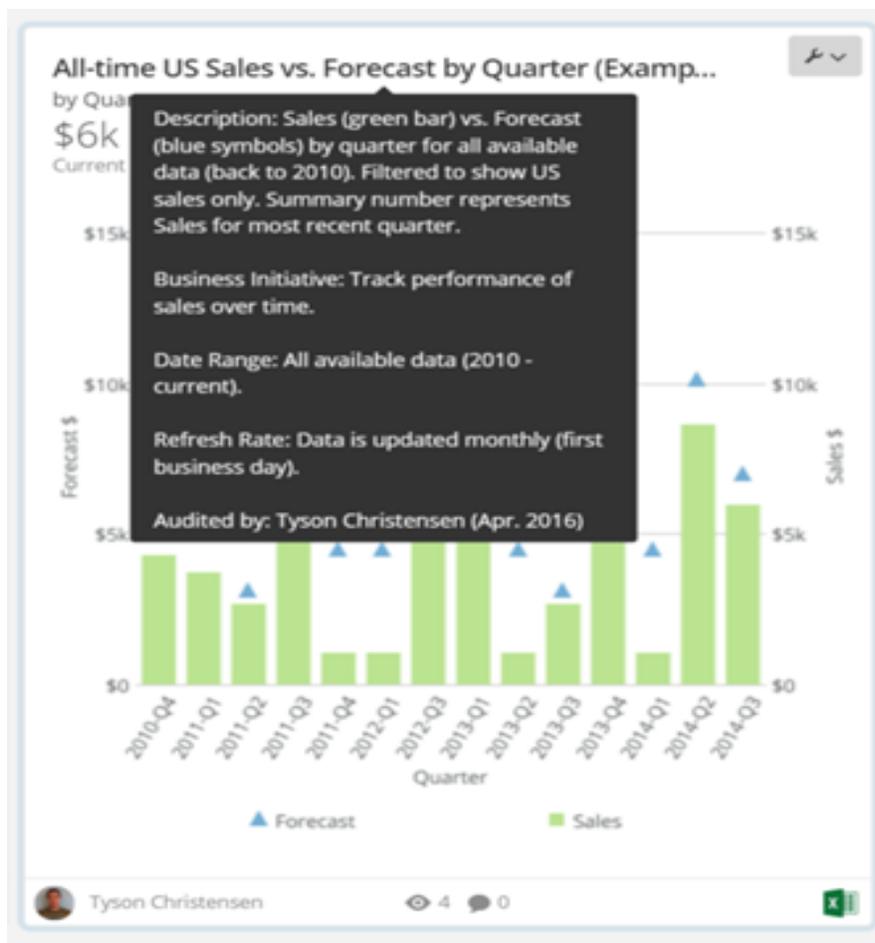
1. It should contain the following information in the Description:
 - Detailed description of the card
 - The business initiative
 - The card's strategic importance
 - Actions the user can take based on this data
 - Helpful Alerts the user can set
 - The date range



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- Drills down options for the card
 - The refresh rate
 - Who the card is audited by
2. Use an appropriate visualization with:
 - A descriptive title
 - Named axes
 - Consistent formatting with other cards in the collection (for example, blue line = forecast, green bar = current actuals)
3. Use an appropriate summary number for the data represented in the card
4. Ensure the card is linked to other appropriate content that applies to the same business question
5. Ensure the card is assigned to the appropriate owner (the person responsible for answering questions about the card)

Example:





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Dataset Best Practices

Each dataset should:

1. Be named with the following template: TYPE_ClientInfo_Source_ReportName (for example, RAW_Acme_Connector1_Performance_Analytics)
2. Use of prepended dataset type:
 - RAW_: Used for raw data file that is pulled directly from a source. Transformations will be done on this data with Magic ETL or MySQL.
 - INT_: Used for datasets that are intermediary steps. Usually the output of a dataflow that prepares the data to be merged with another source.
 - PROD_: Used for final DataSets. These are DataSets you build cards on.
 - TEMP_: Used for test, development, or ad-hoc datasets. These should be periodically audited to determine necessity.
3. Needs to contain a description of what important metrics and dimensions are included along with any applicable filters.

DataFlow Best Practices

Each DataFlow should:

1. Include descriptive names for each step of the transformation.
2. Include a description of the input datasets being merged or manipulated and the DataSet being created. Should also indicate the owner of the data.
3. Be named the same as the output of the DataFlow. This allows for easy identification of which DataSets are produced by which DataFlows.