

LAB 9: CREATE AN EFFECTIVE DASHBOARD & STORYTELLING



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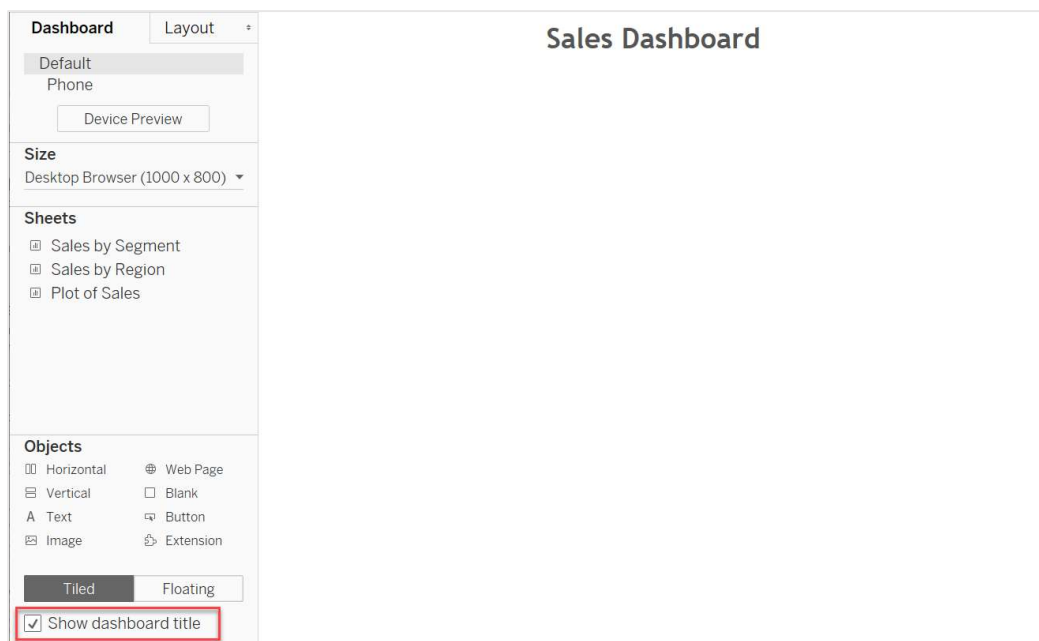
Learning Outcome

At the end of this session, learners will be able to:

- Combine worksheets in a dashboard
- Filter existing views in the dashboard
- Create a dashboard with filter actions and hyperlinks
- Improve dashboard design using the design best practices
- Format and add story points to a story

Task 1: Build an Interactive Dashboard

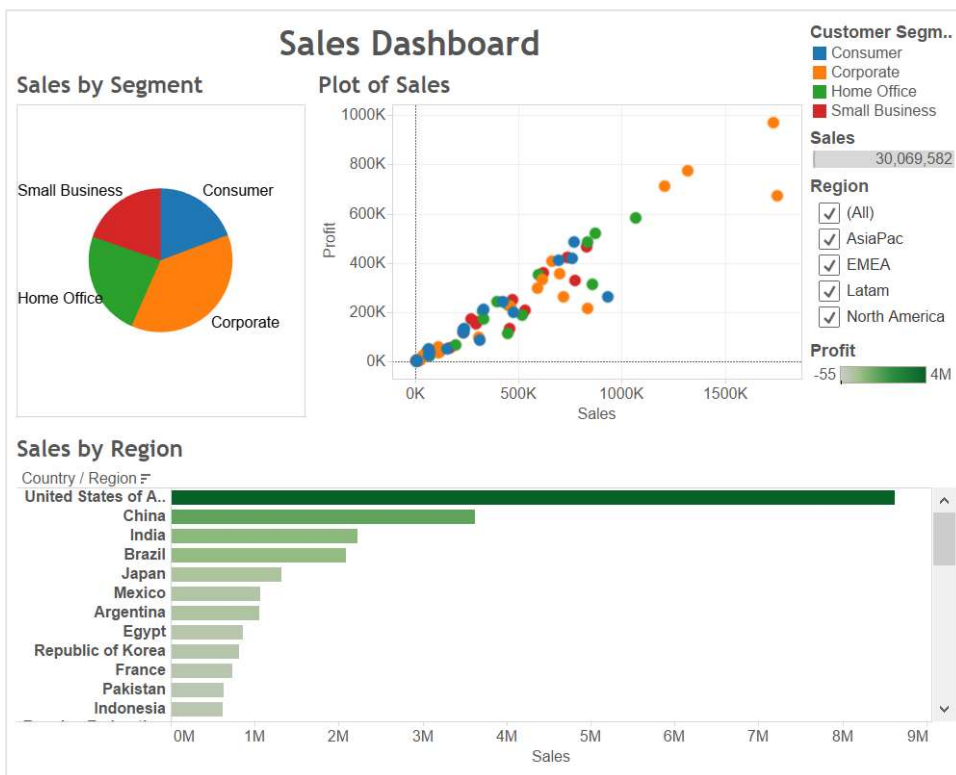
1. Open the **dashboard_starter.twbx** workbook. In the workbook, you will find three views created to show sales by segment, region and profit.
2. At the bottom of the workspace, click the **New Dashboard**  to add a dashboard sheet.
3. Select the **Show dashboard title** and enter **Sales Dashboard** for the title.



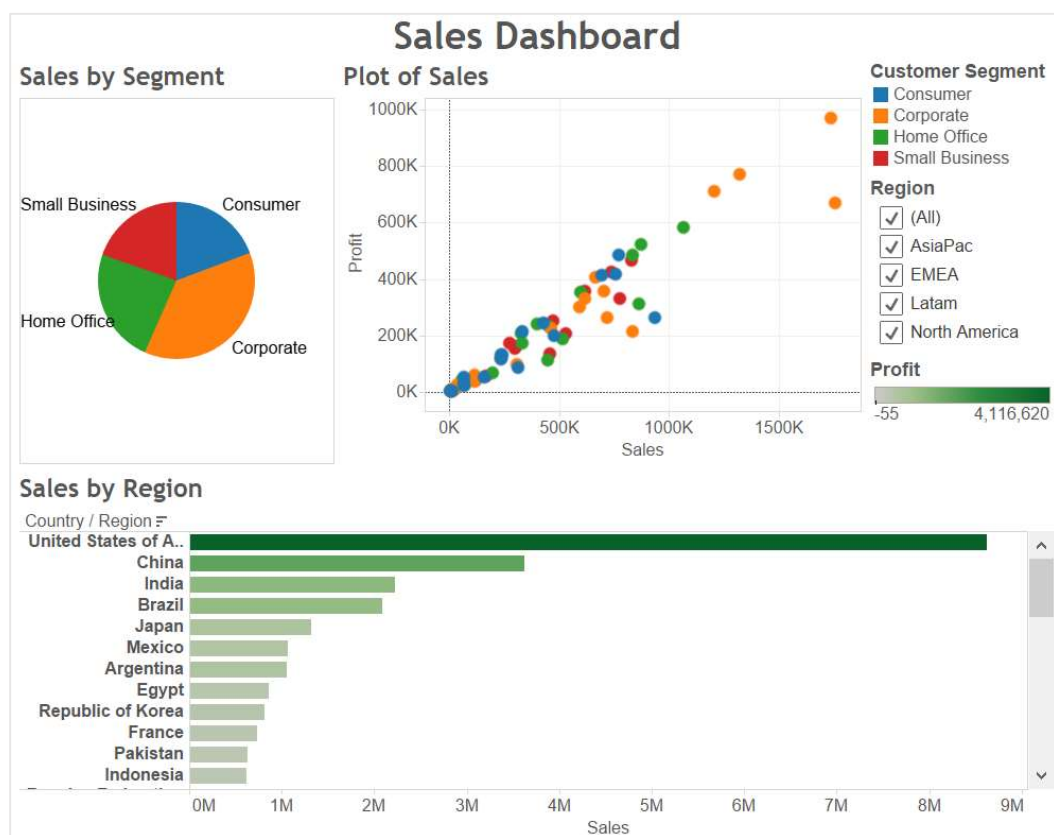
4. Drag and drop the **Sales by Segment** worksheet onto the dashboard.



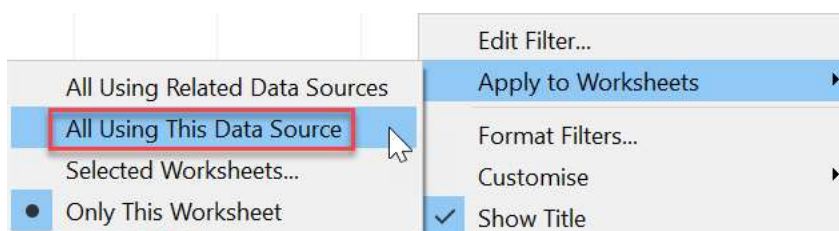
5. Drag and place the **Plots of Sales** to the right of Sales by Segment.
6. Drag and place **Sales by Region** below Sales by Segment and Plots of Sales.
Tip: Make sure you see the gray bar along the full width of the window, at the bottom, before you drop the worksheet.
7. Adjust Sales by Segment and Plot of Sales to fit the entire view. Select **Sales by Segment**, click its drop-down arrow, select **Fit** and click **Entire View**.



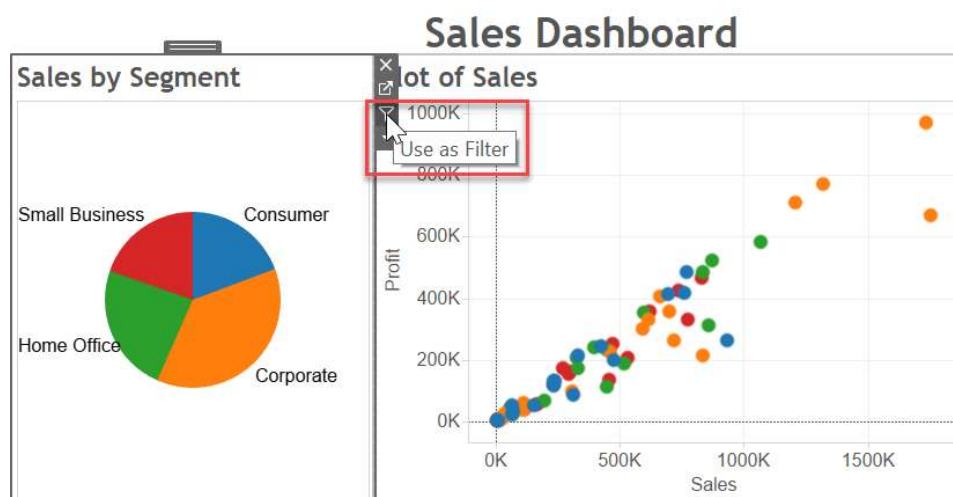
8. Remove the Sales legend. Select the gray **Sales legend** and click the **X** to remove it. Adjust the title position and make the legends and filter visible.



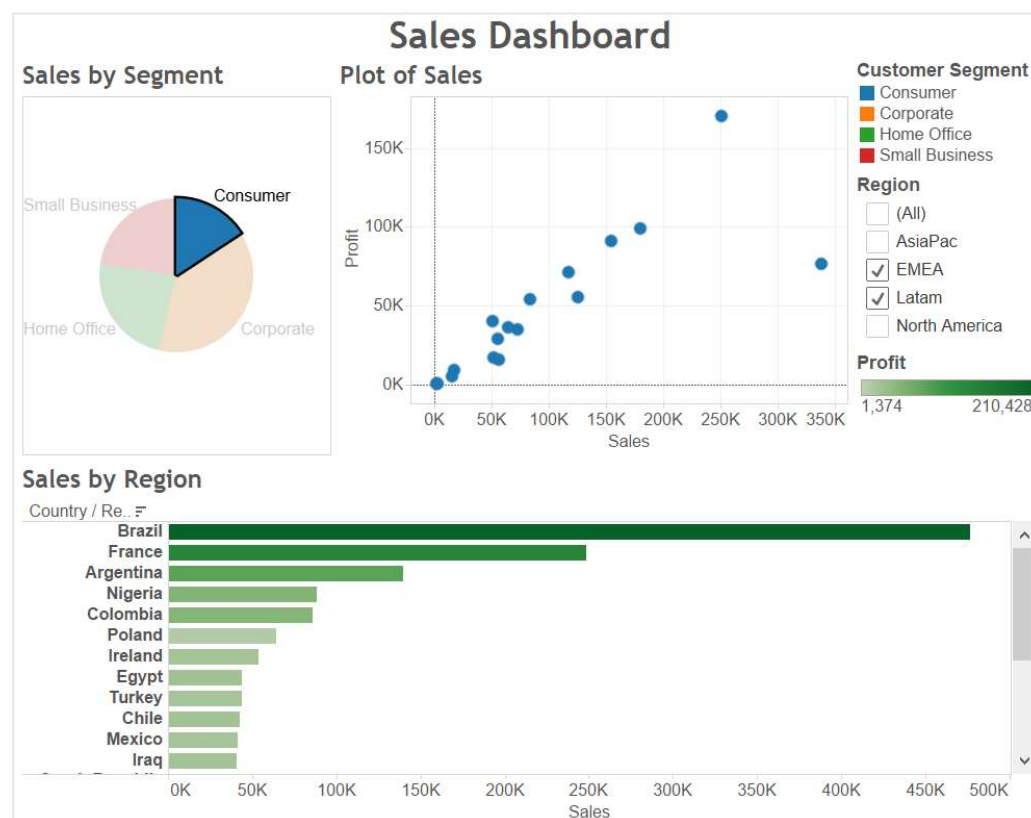
9. On the **Region** filter, click the drop-down arrow, select **Apply to Worksheets**, and click **All Using This Data Source**.



10. On the **Sales by Segment** view, click the **Use As Filter** button.




11. Click on the Sales by Segment and Region to test the filter.

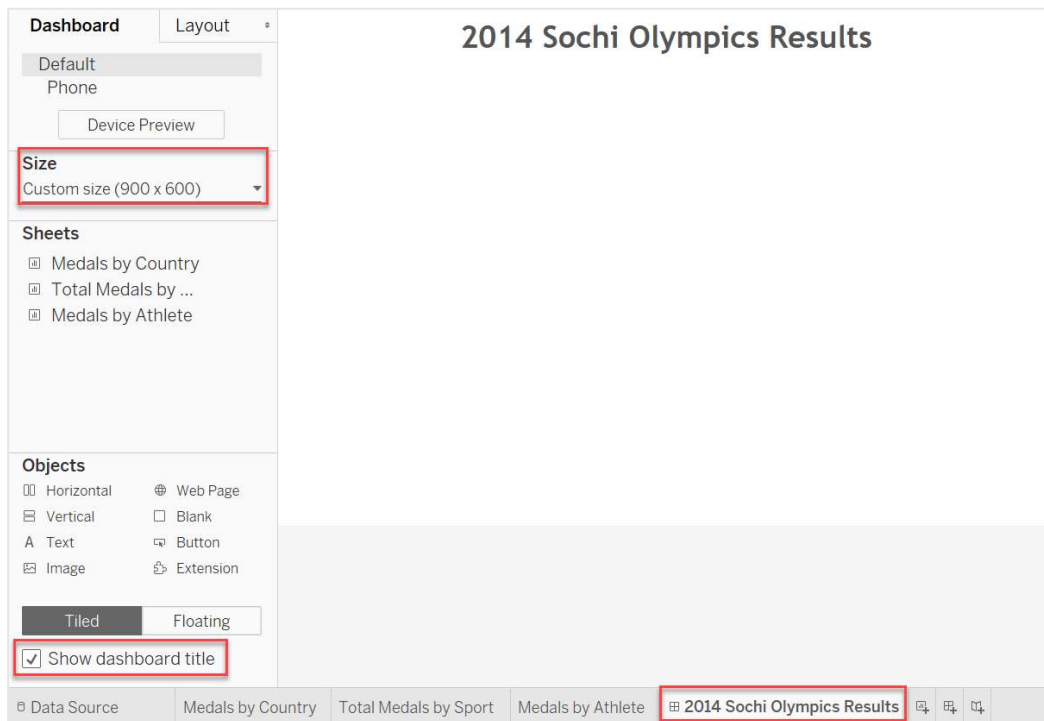


12. Try filtering your newly dashboard and answer the following question:
In the Small Business segment, which country in AsiaPac recorded the greatest sales?

Task 2: Add Actions to Dashboard

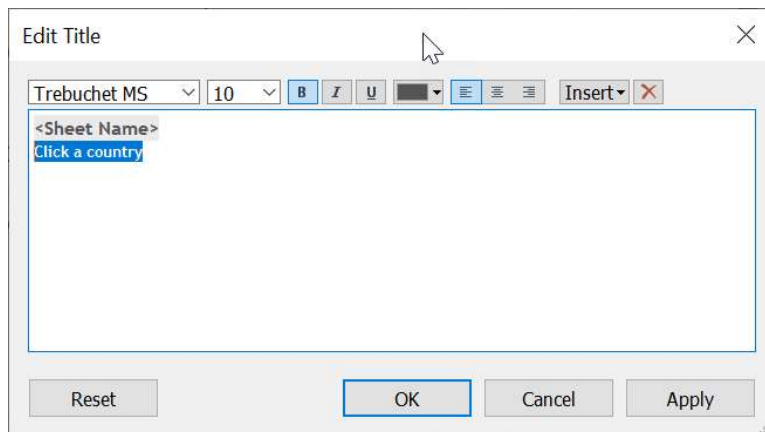
For this exercise, you will create an interactive dashboard that allows users to click a country and sport to view the related medal winners at the 2014 Olympics. You will also enable users to be able to click hyperlinks to find out more about each athlete and sport.

1. Open the **action_dashboard_starter.twbx** workbook. In the workbook, you will find three views: **Medals by Country**, **Total Medals by Sport** and **Medals by Athlete**.
2. At the bottom of the workspace, click the **New Dashboard**  to add a dashboard sheet. Double-click the new dashboard tab and name it: **"2014 Sochi Olympics Results"**.
3. On the **Size** drop-down menu, change the dashboard **Width** to **900px** and **Height** to **600px**.
4. Check the **Show dashboard title** box.

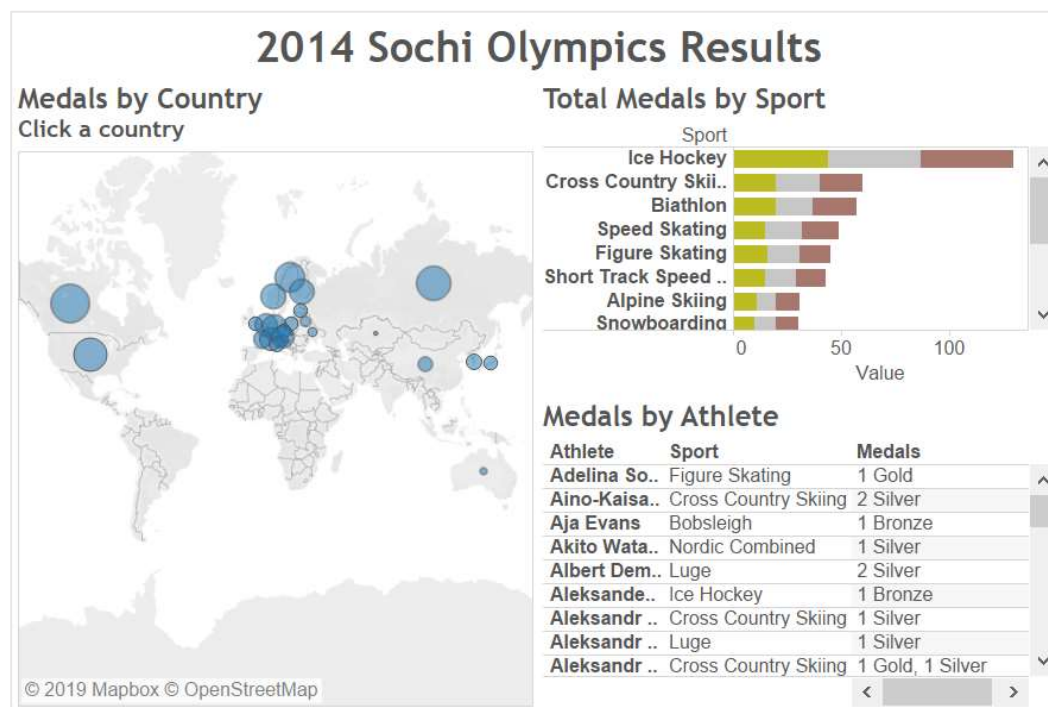


5. Drag the **Medals by Country** worksheet onto the dashboard.

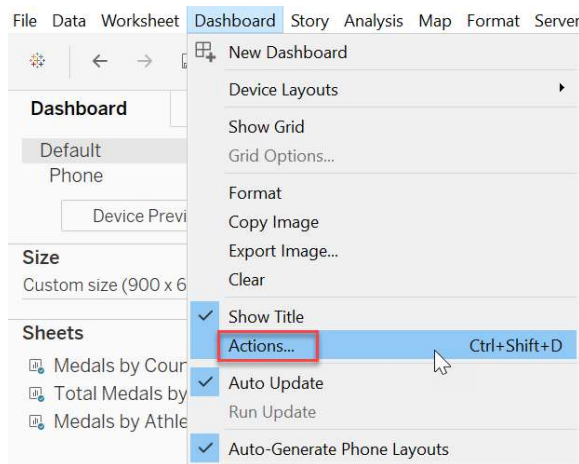
6. Right-click the worksheet title, and then click **Edit Title**. Add a line below the title and type: **“Click a country”**. Change the font size of the new line to **10**. Click **OK**.



7. In the **Dashboard** pane, click **Vertical** and drag a vertical layout container to the right half of the dashboard.
8. Drag the **Total Medals by Sport** worksheet into the vertical layout container.
9. Drag the **Medals by Athlete** worksheet into the layout container under Total Medals by Sport.



10. On the **Dashboard** menu, click **Actions**.

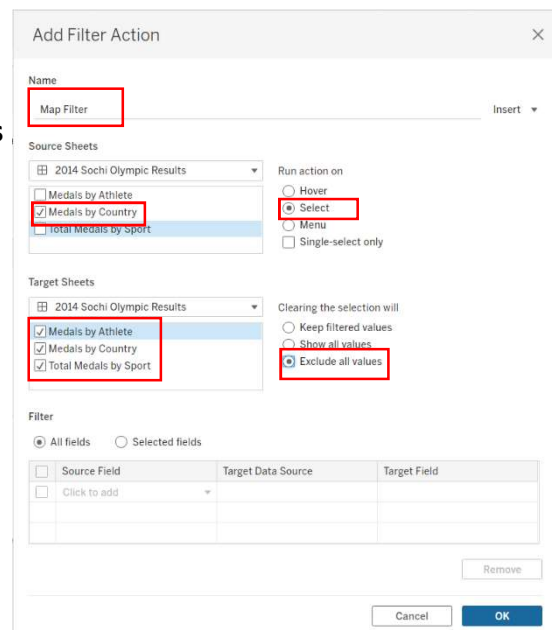


11. Click **Add Action** and choose **Filter**.

12. Name the Filter “**Map Filter**” and use the following settings:

- Source Sheets: **Medals by Country**
- Run action on: **Select**
- Target Sheets: **Select all available sheets**
- Clearing the selection will: **Exclude all values**

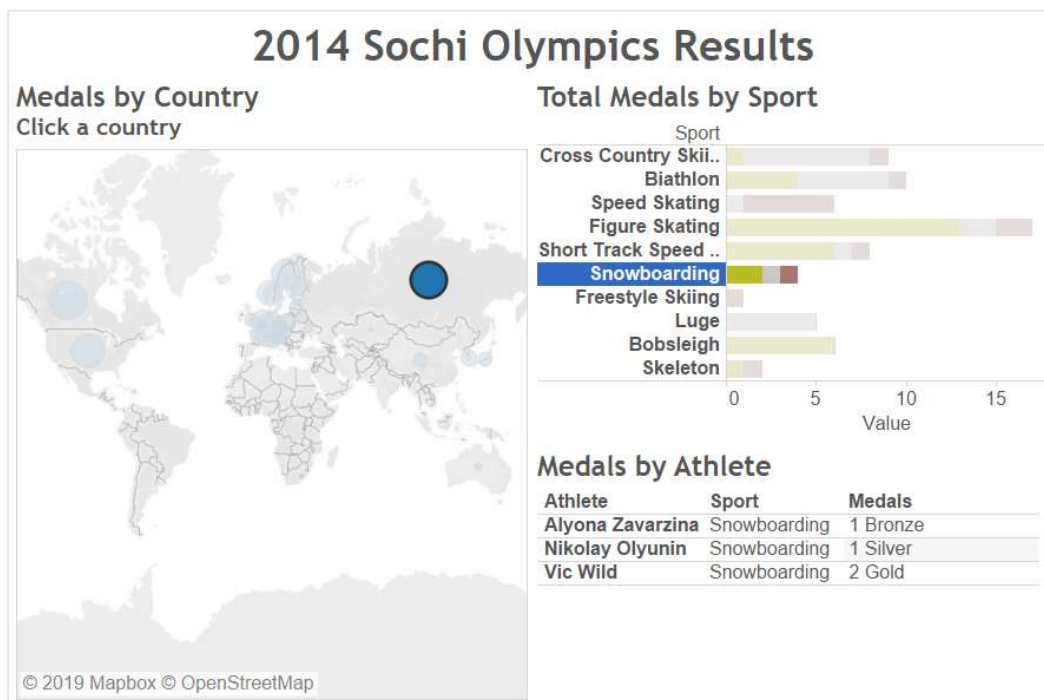
Click **OK**.



13. In the Actions dialog, add another Action. Click **Add Action** and choose **Filter**.
14. Name the filter "**Filter by Athletes**" and use the following settings:
 - a. Source Sheets: **Total Medals by Sport**
 - b. Run action on: **Select**
 - c. Target Sheets: **Medals by Athlete**
 - d. Clearing the selection will: **Exclude all values**

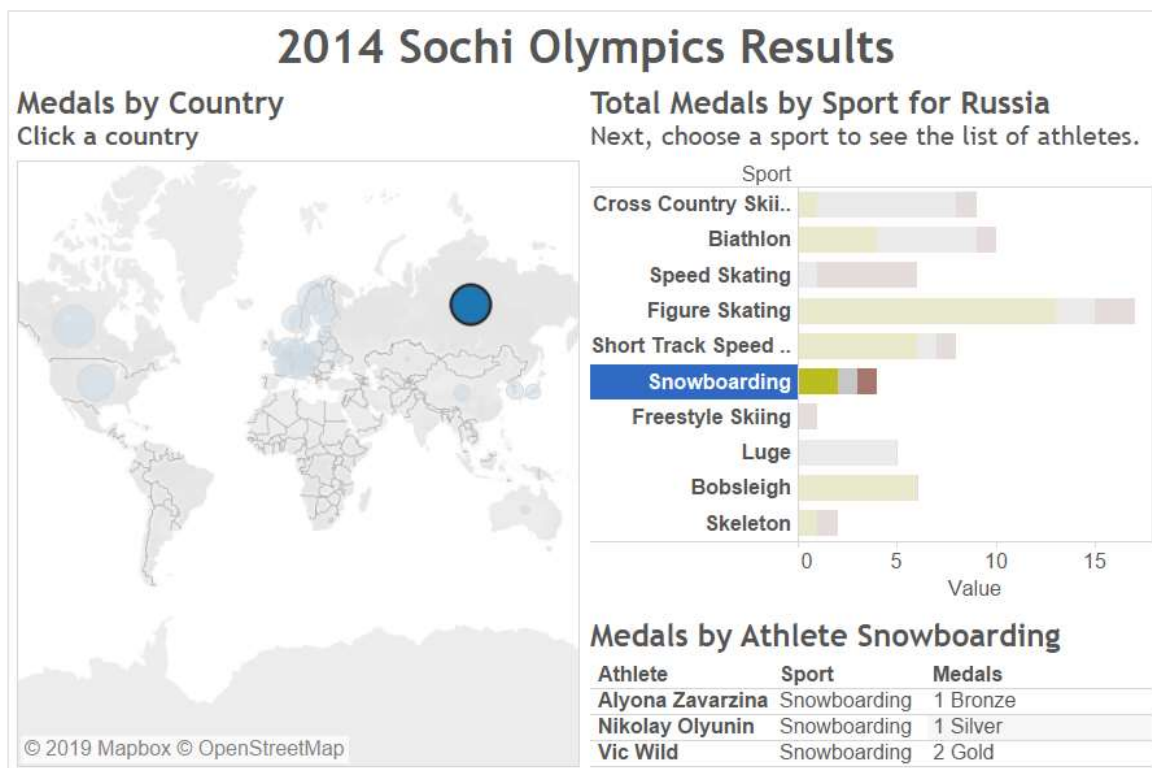
Click **OK**, and then click **OK** again to close Actions.

15. Test your actions to make sure events and athletes appear.
 - a. Click **Russia's** mark on the map.
 - b. Click **Speed Skating** in the bar chart.
 - c. Click a **blank area** in the bar chart to clear the player list.
 - d. Click **Snowboarding** in the bar chart.



16. In the dashboard, click to select the **Total Medals by Sport** view.
17. In the top right corner, click the drop-down arrow, select **Fit** and then choose **Entire View**.
18. Use the same method to set **Medals by Athlete** to **Fit Width**.
19. Select Russia's mark on the map and Snowboarding in the bar chart to test the change.

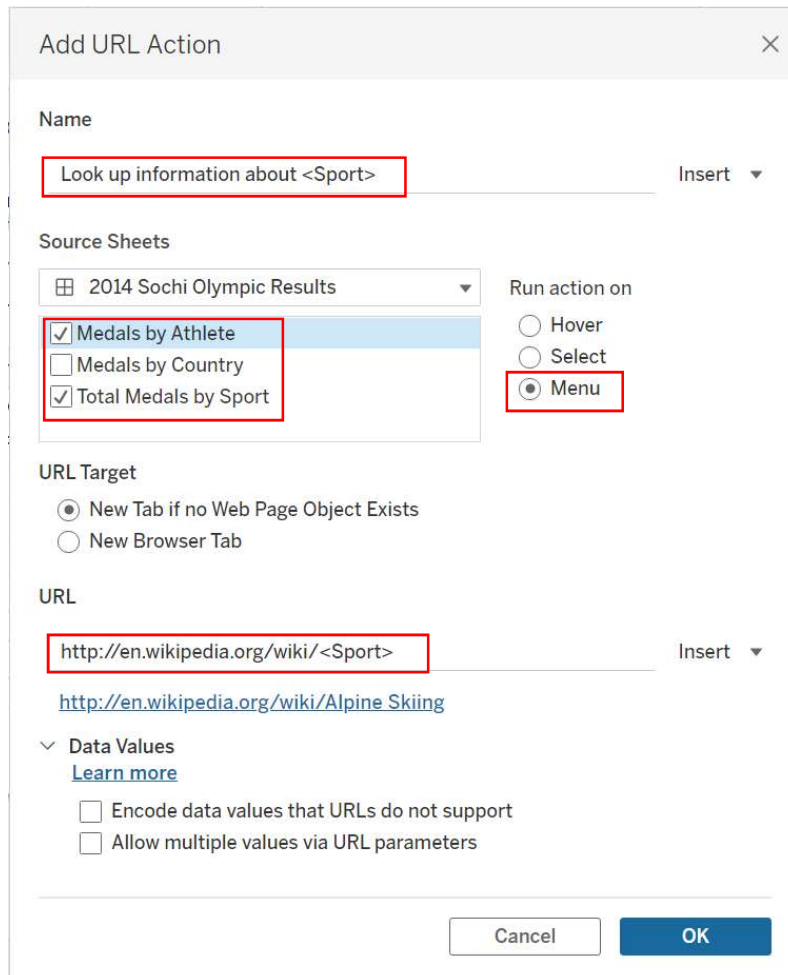
20. Right-click the **Total Medals by Sport** title, and then click **Edit Title**. Edit the title to look like this: **<Sheet Name> for <Country>**.
21. Add a line below the title and type: **"Next, choose a sport to see the list of athletes."**
22. Change the font size of the new line to **10**, and then click **OK**.
23. Edit the title of Medals by Athlete to read: **<Sheet Name> <Sport>**, and then click **OK**.
24. Select Russia's mark on the map and Snowboarding in the bar chart to test the change.



25. On the **Dashboard** menu, click **Actions**.
26. Click **Add Action** and choose **Go to URL**.

27. Name the Filter “**Look up information about <Sport>**” and use the following settings:
- Source Sheets: **Medals by Athlete** and **Total Medals by Sport**
 - Run action on: **Menu**
 - URL: **<http://en.wikipedia.org/wiki/<Sport>>**

Click **OK**.



Add URL Action

Name: Look up information about <Sport> Insert ▾

Source Sheets

2014 Sochi Olympic Results ▾

☒ Medals by Athlete

☐ Medals by Country

☒ Total Medals by Sport

Run action on

☐ Hover

☐ Select

☒ Menu

URL Target

☒ New Tab if no Web Page Object Exists

☐ New Browser Tab

URL

http://en.wikipedia.org/wiki/<Sport> Insert ▾

[http://en.wikipedia.org/wiki/Alpine Skiing](http://en.wikipedia.org/wiki/Alpine_Skiing)

▼ Data Values

[Learn more](#)

☐ Encode data values that URLs do not support

☐ Allow multiple values via URL parameters

Cancel OK

28. In the Actions dialog, add another Action. Click **Add Action** and choose **Go to URL**.
29. Name the filter “**Look up information about <Athlete>**” and use the following settings:
- Source Sheets: **Medals by Athlete**
 - Run action on: **Menu**
 - URL: **[http://www.google.com/search?q="<Athlete>" + Olympics](http://www.google.com/search?q=)**
 - URL Options: **URL Encode Data Values**

Add URL Action

Name
Look up information about <Athlete> Insert

Source Sheets
2014 Sochi Olympic Results
☒ Medals by Athlete
☐ Medals by Country
☐ Total Medals by Sport

Run action on
☐ Hover
☐ Select
☒ Menu

URL Target
☒ New Tab if no Web Page Object Exists
☐ New Browser Tab

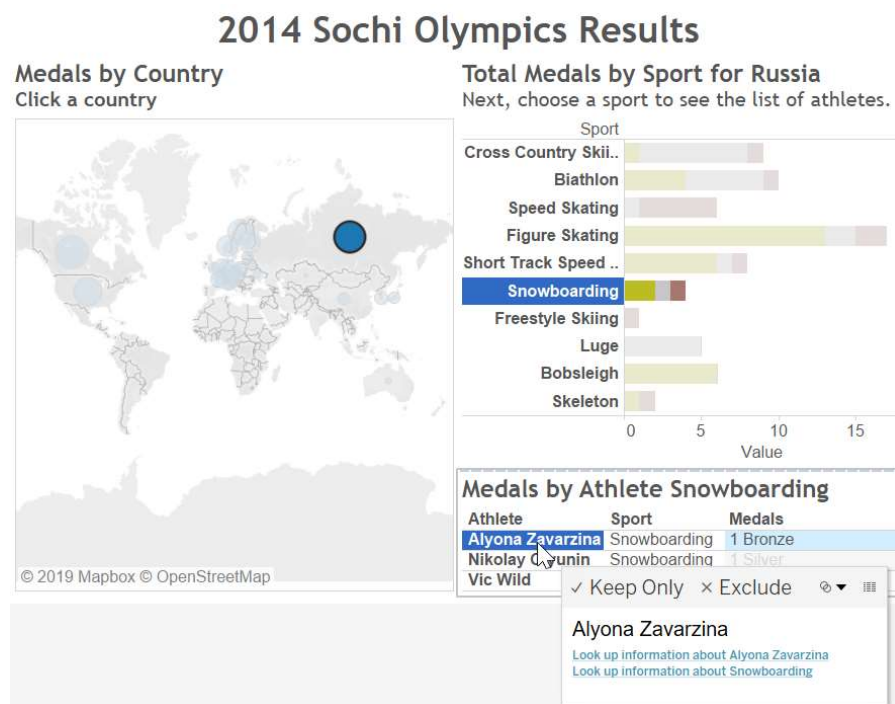
URL
<http://www.google.com/search?q=<Athlete>+Olympics> Insert
<http://www.google.com/search?q=Adelina Sotnikova+Olympics>

Data Values
[Learn more](#)
☒ Encode data values that URLs do not support
☐ Allow multiple values via URL parameters

Cancel OK

Click **OK**, and then click **OK** again to close Actions.

30. Select Russia's mark on the map and Snowboarding in the bar chart. Click on one of the Athlete to test the change.



31. Try filtering your newly dashboard and answer the following question:
How many Canada athletes won gold medals in the sport of Freestyle Skiing?

Task 3: Creating a Story

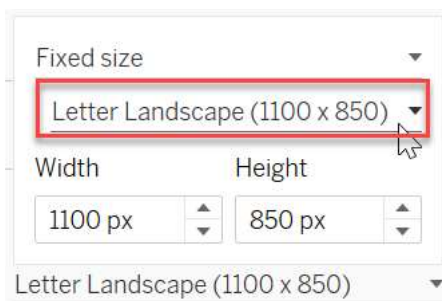
Profits in the Furniture department of your company are very low, although sales are high compared to other departments. After analyzing the data, you've found that table sales in the East region have been deeply discounted. In this exercise, you will be creating a data story to present your findings.

Open the **story_starter.twbx** workbook. In the workbook, you will find the **Story Starter View** with the following views:

- Average Discount
- Customers Purchases
- Profitable States
- Profits by Department
- Sales and Profits

Change the Story Size

1. Ensure that the **Story Starter View** is selected.
2. At the bottom of the **Size Bar**, under **Story size**, click the drop-down menu and change story size to **Letter Landscape (1100 x 850)**.



Update the Story Title

1. Double-click the title at the top. In the **Edit Title** dialog box, enter the text: **What is Happening with Tables in the East?**
2. Click **OK**.

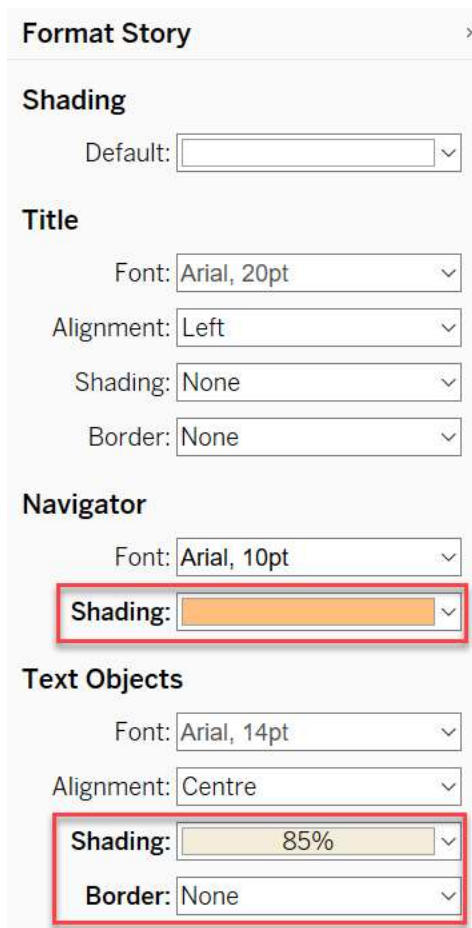
What is Happening with Tables in the East?



Apply Global Story Formatting

1. On the **Format** menu, select **Story**.

2. At the **Format Story** pane, perform the following settings:
 - a. Set the **Navigator Shading** to the color of your choice.
 - b. Set the **Text Objects Shading** to the color of your choice, at **85%**.
 - c. Set the **Text Objects Border** to **None**.



Format Story [X]

Shading
Default: []

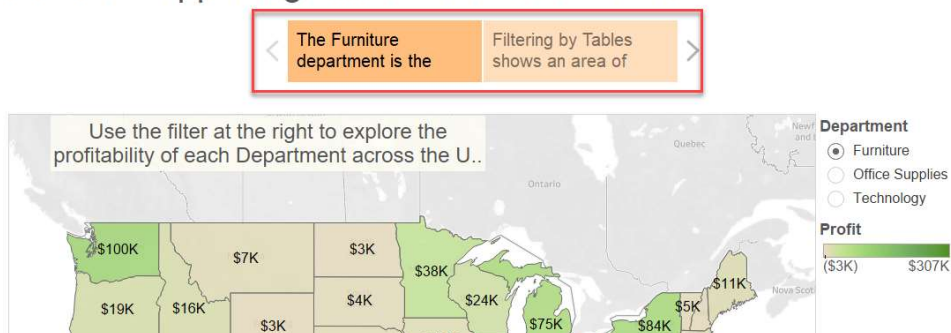
Title
Font: [Arial, 20pt]
Alignment: [Left]
Shading: [None]
Border: [None]

Navigator
Font: [Arial, 10pt]
Shading: [Orange] (highlighted)

Text Objects
Font: [Arial, 14pt]
Alignment: [Centre]
Shading: [85%] (highlighted)
Border: [None] (highlighted)

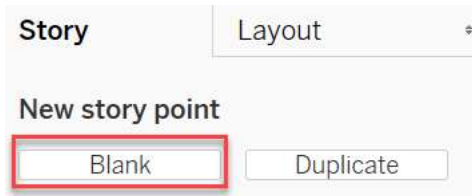
3. Close the Format Story pane.

What is Happening with Tables in the East?



Add Customer Purchases Story Point

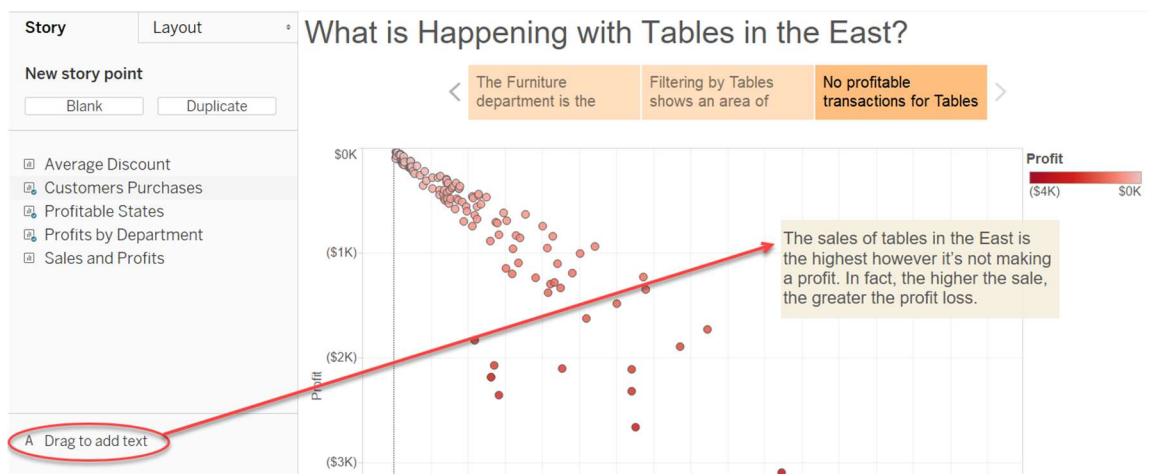
1. Click the **Blank** button in the Story pane.



2. Drag the **Customers Purchases** worksheet to the view.
3. Click **Add a caption** and enter the text: **No profitable transactions for Tables in the East.**
4. In the **Side Bar**, click and drag **Drag to add text** to the top right area of the view.

A Drag to add text

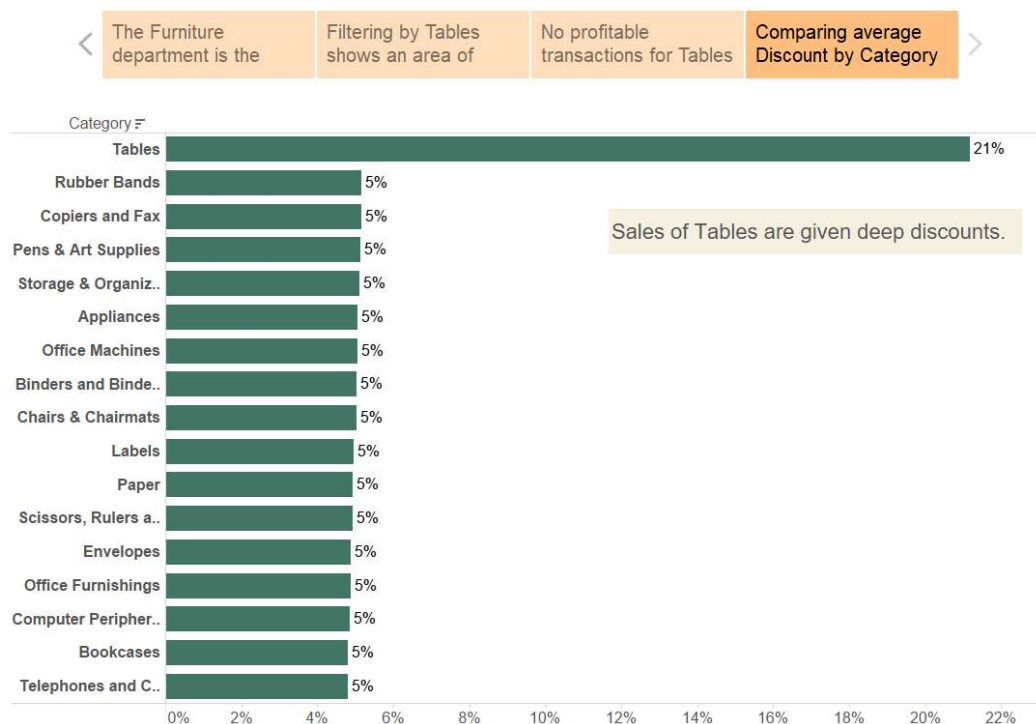
5. Enter the description text: **The sales of tables in the East is the highest however it's not making a profit. In fact, the higher the sale, the greater the profit loss.**
6. Align the text to the left by clicking **Left** margin align button.
7. Click **OK** to close the **Edit Description** dialog box.
8. Click and drag the corner of the description to adjust the width and height.



Add Average Discount Story Point

1. Click the **Blank** button in the Story pane.
2. Drag the **Average Discount** worksheet to the view.
3. Click **Add a caption** and enter the text: **Comparing average Discount by Category**.
4. In the **Side Bar**, click and drag **Drag to add text** to the top right area of the view.
5. Enter the description text: **Sales of Tables are given deep discounts.**
6. Click **OK** to close the **Edit Description** dialog box.
7. If necessary, click and drag the corner of the description to adjust the width and height.

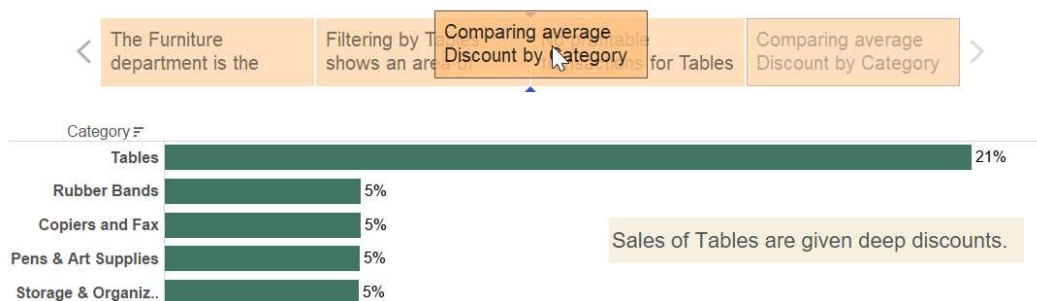
What is Happening with Tables in the East?



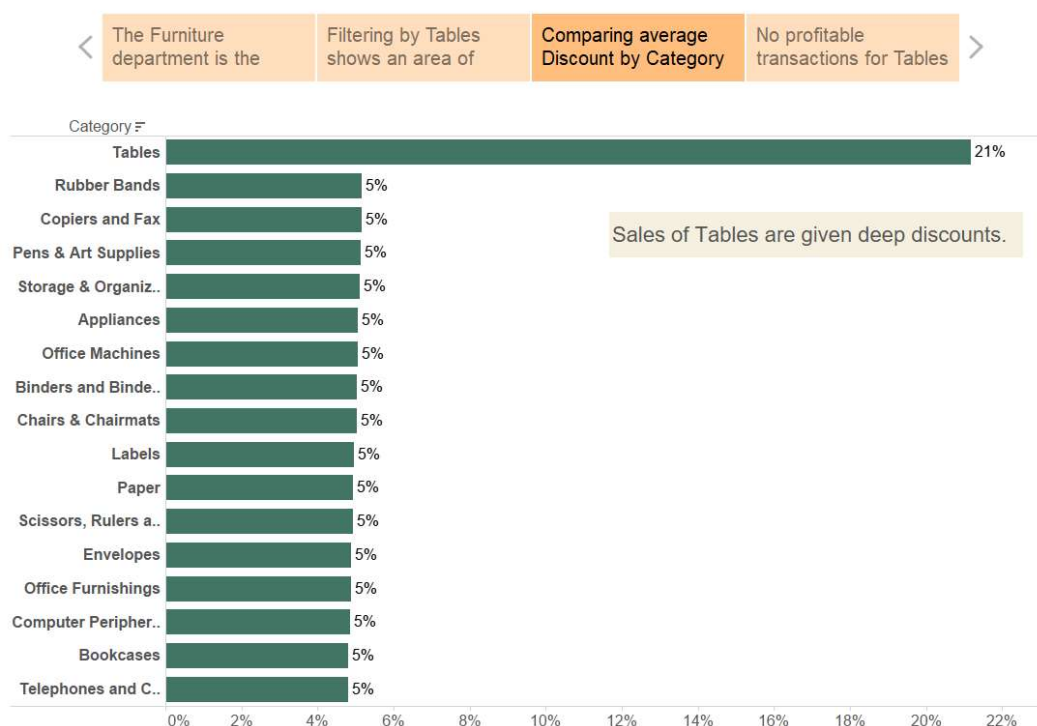
Adjust Story Point Position


1. Click and drag the last Navigator button (**Comparing average Discount by Category**) and place it in the third position.

What is Happening with Tables in the East?



What is Happening with Tables in the East?



2. Click on the **Presentation Mode** icon  at the top of the screen or press **F7**.
3. Click each Navigator button and read through the story.