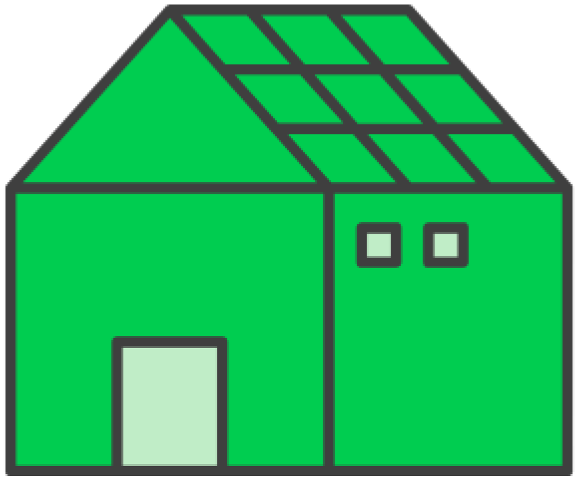

User guide

Carleon case – Dashboard

Group 4

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17/01/2022

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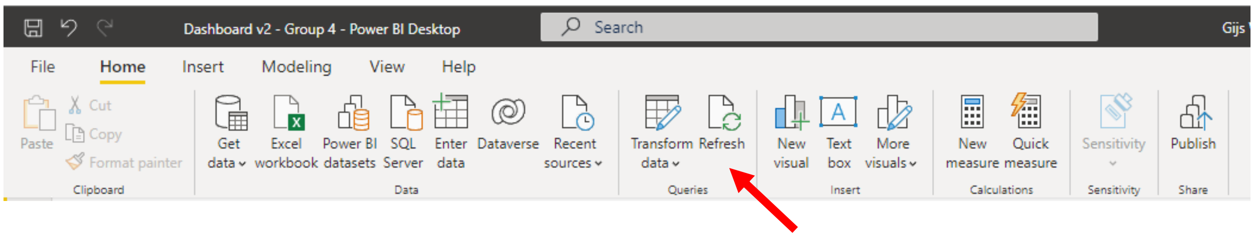
1. Deployment

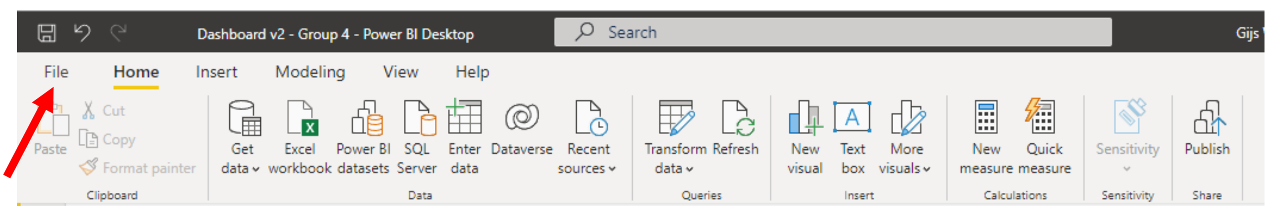
To deploy the dashboard, it is important to follow the steps below. Make sure the following prerequisites are met:

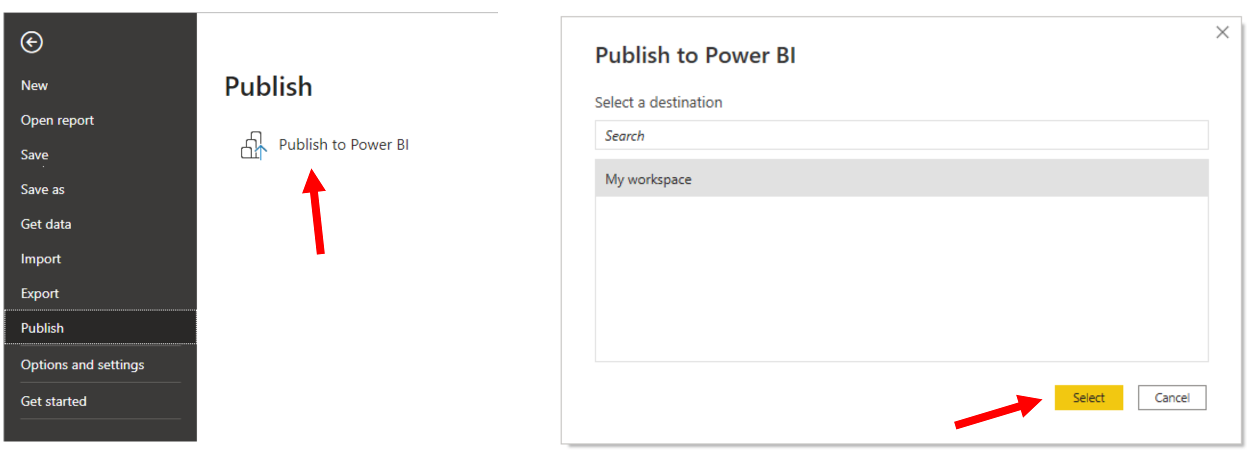
- Power BI Desktop is installed
- You have access to the database

First the data used in the dashboard needs to be updated. This can easily be done by opening the dashboard in '*Power BI Desktop'* and clicking '*Refresh'*, which should be in the *'Home'* tab under *'Queries'*.

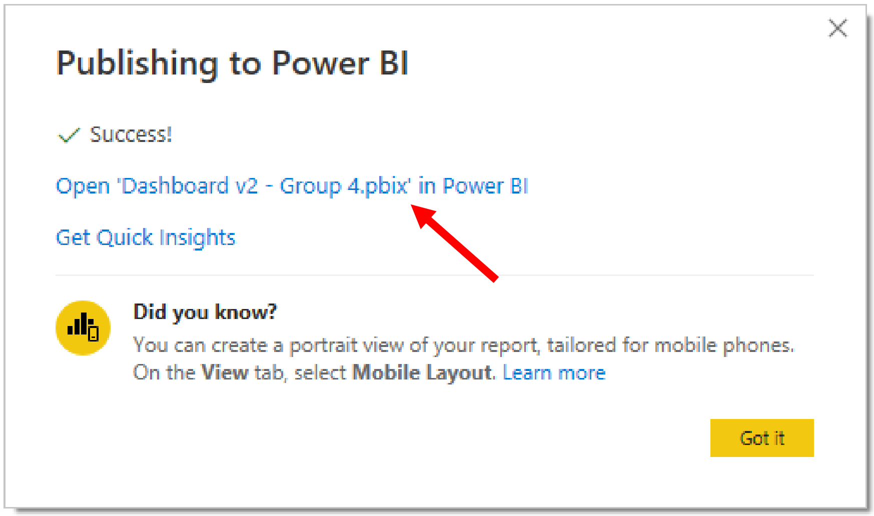


After the data is successfully updated, the dashboard needs to be published to make the update accessible. To do this, click *'File'* followed by *'Publish'* → *'Publish to Power BI'*. This will show the option to choose what workspace you want the dashboard to be published in. Select the destination and click *'Select'*.

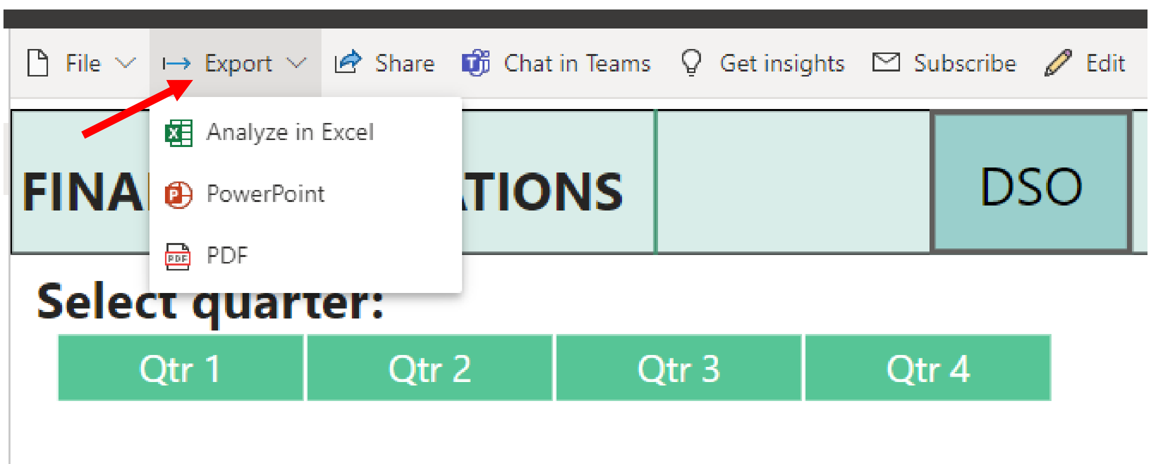




After you click select, Power BI Desktop will start publishing the refreshed dashboard. After it is done, you will see a popup similar to this one:



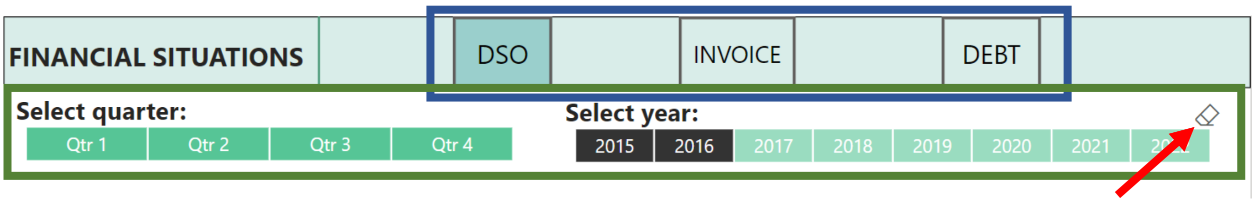
Clicking *'Open dashboard in Power BI'* you can open the new dashboard in Power BI, where you can easily send the dashboard to the recipients by sharing the dashboard through *'Share'* or *'Export'* to *'Analyze in Excel'*, *'PowerPoint'*, or *'PDF'*.

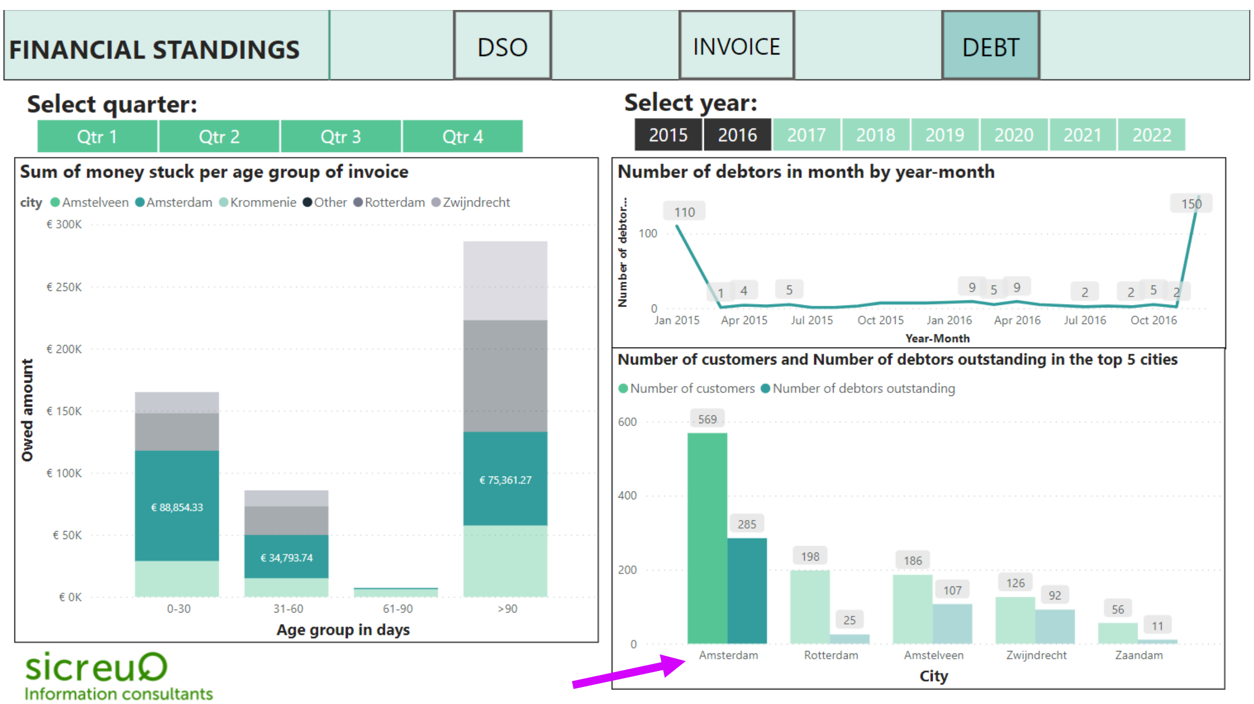


2. Usage

2.1. Dashboard basics

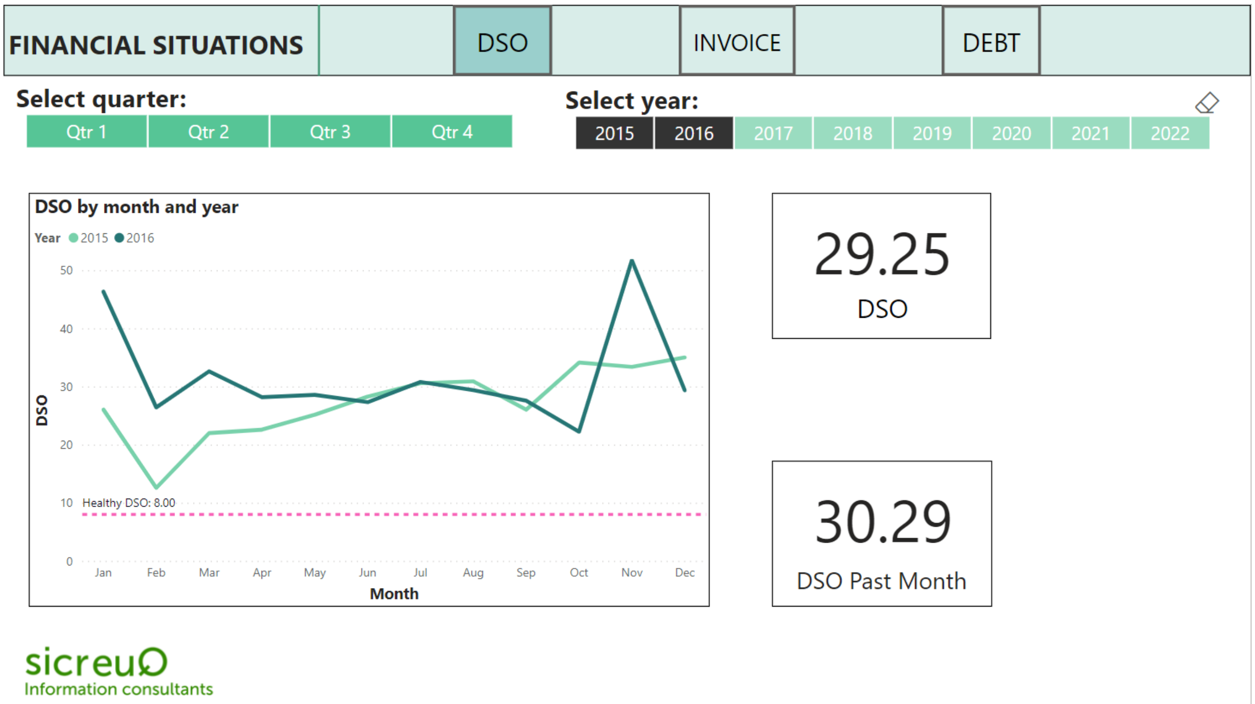
First, the basic dashboard controls are discussed that are available in all pages. At the top of the dashboard, you are able to navigate to the 3 pages of the dashboard; *'DSO'*, *'INVOICE'* and *'DEBT'* (highlighted in blue below). Each page gives the option to filter data per quarter and year with the buttons highlighted in green. Multiple years and quarters can be selected in any combination by clicking on them. If you want to reset the selection, you can click the eraser that shows when you hover over a selector (highlighted with red arrow). Within each page, you can also filter out information by clicking on a certain value. As an example, in the *'DEBT'* page below "Amsterdam" is clicked where the purple arrow is pointing. As you can see, this filters all other information on the page to highlight the data about Amsterdam.





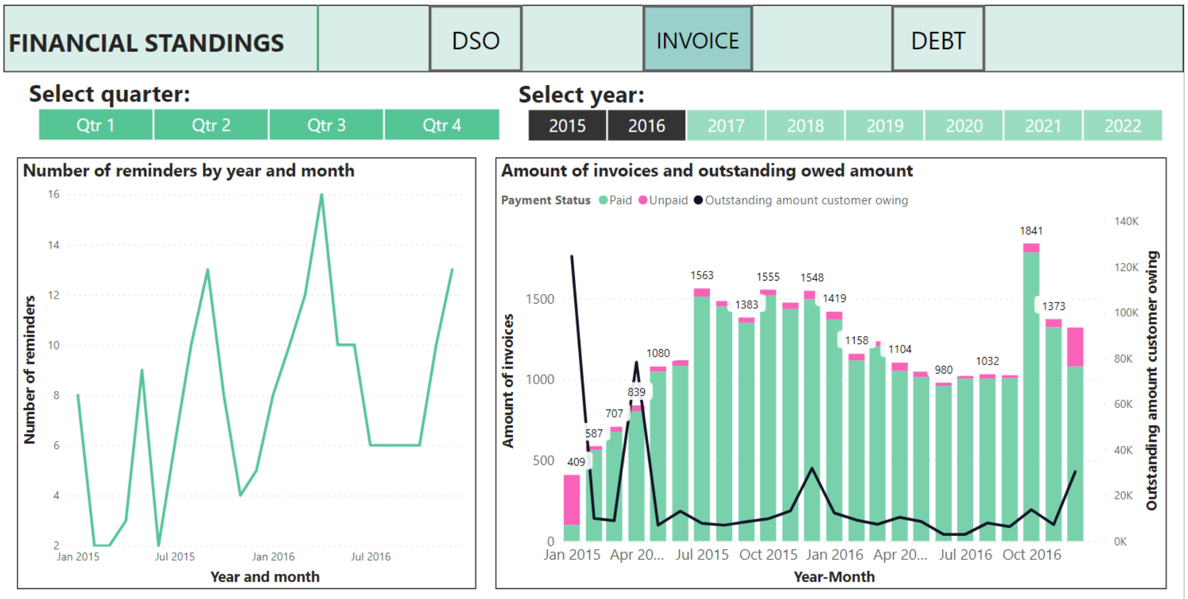
2.2. DSO page

When you open the dashboard, you will be greeted by the most valuable page, *'DSO'.* Here you can immediately see the DSO trend lines per year on the left, compared to a healthy DSO of 8 days. The top *'DSO'* value is the DSO for the selected time period. The *'DSO Past Month'* shows the DSO for the last 30 days.



2.3. Invoice page

The next page is the *'INVOICE'* page. This page shows the trends in all the invoices. The left graph shows how many reminders have been send to late-paying customers. The right graph shows 2 things: The black line shows how much money is owed based on each month. The bars show the number of paid invoices in green and the number of unpaid invoices in pink. At the top you can see the total invoices send that month.



2.4. Debt division page

The third and final page shows more details about the outstanding debt customers have. The left graph gives insight of the owed money per age group. The age is the amount of days since the due date of an unpaid invoice. Within these bars, the top 5 cities are highlighted with their respective amounts of debt. On the right, we can see the trend line of new debtors per month at the top. At the bottom, the number of debtors is compared to the total number of customers of the top 5 cities.