smartsheet

Create your dashboard activity

✓ By the end of this activity, you will be able to:	⬇ Follow these steps to get the course activity assets
- Create a dashboard - Insert and customize a chart widget - Add rich text to your dashboard - Add a list of links	1. Go to the Get the Course Activity Assets lesson on the left 2. Click the appropriate link for your region 3. Open the following dashboard: 04_Dashboards Course Assets > 13_Create Your Dashboard Activity > Design Team Leadership Dashboard

Add rich text widget

You need to add a rich text widget in the upper right corner of your dashboard explaining who to contact for questions. Follow these instructions:

1. Open **Design Team Leadership Dashboard**
2. Select **Edit Dashboard** (pencil icon)
3. Select **Add Widget** (+ button)
4. Select **Rich Text**
5. Give your title a **light gray background**
6. Title your widget **"Welcome to our dashboard"**
7. Add some helper text that explains who to contact for questions.
8. Format your text however you'd like
9. Size and position your widget in the top right corner above the request form

oard   Cancel   Save

Welcome to our Dashboard

This dashboard shows the status of the design team.
Please contact mbfadmin@mbfcorp.com with questions.

2

gent Requests

MBFCORP

Submit a Marketing Request

Submit a marketing request through this form and we'll contact you within 24 hours of the submission.

Add chart widget

You need to add a chart widget widget in the middle of your dashboard that shows the number of requested and in progress requests from each department. Follow these instructions:

1. Select **Add Widget**
2. Select **Chart**
3. Select **Add Data**
4. In the Add Chart Data window find and select the sheet called **Department - Status Summary** in the practice folder
5. Select and highlight all the data available including the department names.

Department	In Progress	Requested
Legal	2	1
Operations	2	2
HR	1	1
Marketing	4	1
Sales	6	2

6. Select **OK**
7. Select the **Stacked bar chart type**
8. Format the **chart title** (make sure you title text is highlighted to make changes to the text)**:**
   a. Make the **background color the darkest shade of blue**
   b. Make the **font white**
   c. Increase the **font size to 16**
   d. Change the **font to Tahoma**
9. Select the **Legend header** from the Chart Widget Editor panel
10. Put the **legend** to the **right** of the chart (if it's not already set to right)
11. Select the **Series** section
12. Change the **colors of both In Progress and Requested** to whatever you like (use the drop down that says Default to select the each series and the color picker to pick a color)
13. Turn on the **Always show value label** check box
14. Select Done
15. Position your chart in the middle of your dashboard above the report and below the three metric widgets.

Add chart widget continued

Here's a sample of what your chart widget might look like. Yours could have different colors and some different formatting depending on the choices you made above.
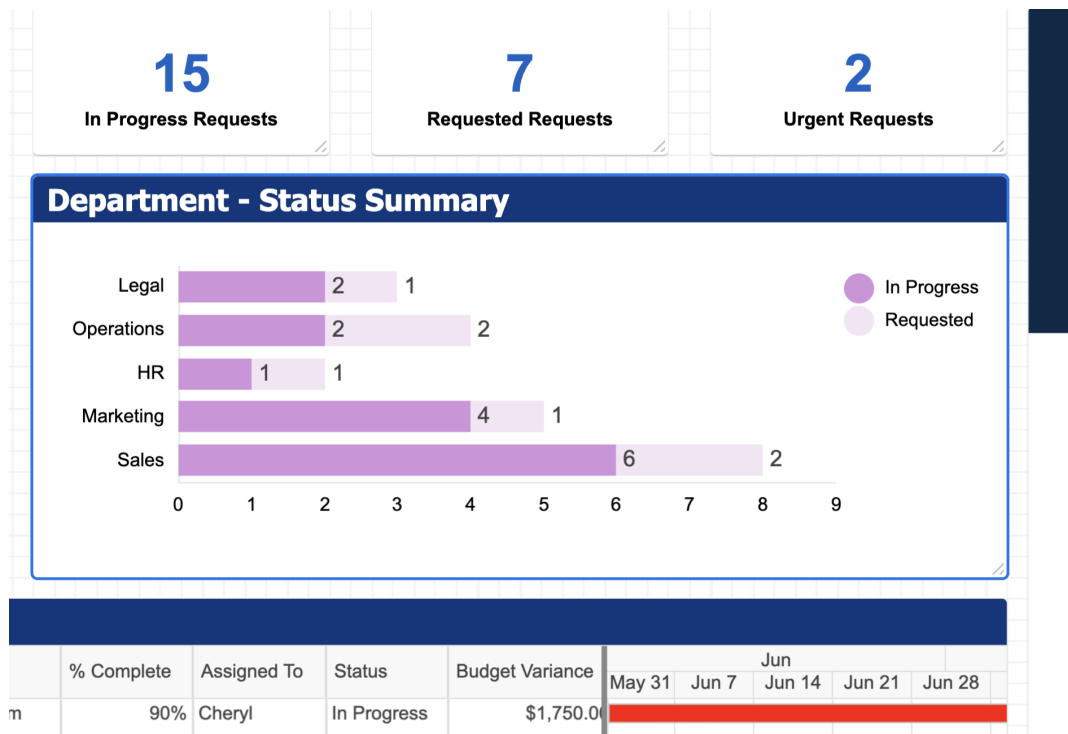
Add metric widget

You added three metric widgets during the interactive lesson. There's one more left to add. Follow these instructions to add the last metric widget:

1. Hover over an existing metric widget
2. Select the **menu** and pick **copy**
3. Right click in the empty space under the MBF Corp logo and select **Paste here**
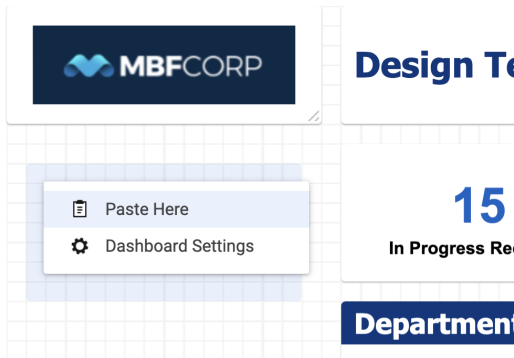
4. With the new widget selected select **Change** in the Data Source section of the Metric Widget Editor
5. Search for and select the **Marketing Request Tracker - CLOSED REQUESTS sheet**
6. Smartsheet will warn you about changing data sources. Select **OK**
7. Select **Sheet Summary Data radio button**
8. Select **Completed Request Count**
9. Select **OK**
10. Change the data label to say "**Requests completed in the last 30 days**"
11. Format the number like this:
    a. Make the font size 28
    b. Make the font color the second darkest shade of blue
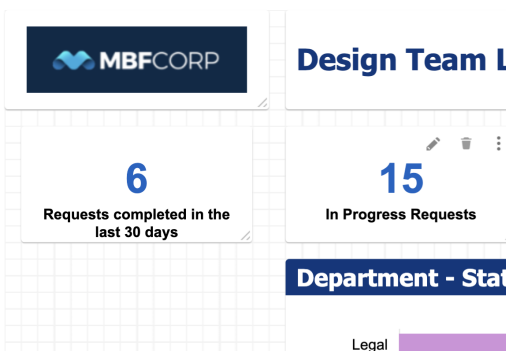
Add shortcut widget

The last widget to add is the shortcut widget. Follow these instructions:

1. Select **Add Widget**
2. Select **Shortcut**
3. Select **Add Shortcut**
4. Select **Smartsheet Item**
5. Find and select the **13_Marketing Request Tracker - Dashboard sheet** from this activity folder
6. Select the **Widget title area and title it Important LInks**
7. Format your title like this
   a. Make the **background color the darkest shade of blue**
   b. Make the **font white**
   c. Increase the **font size to 16**
   d. Change the **font to Tahoma**
8. Add a few additional shortcuts to practice this functionality
9. Position your widget and resize it to fit to the left of the chart

Extra credit

If you would like extra practice, try making a chart with the Budget Summary sheet data. There are lots of ways to display that data.

Great job! You reached the end of the activity!