

DASHBOARD DESIGN PROCESS

STEP 1

ANALYSE REQUIREMENTS



- Collect Requirements
- Choose Right Charts
- Draw Mockups
- Choose Colors

DASHBOARD DESIGN PROCESS

STEP 2

BUILD DATA SOURCE



- Connect Data
- Create Data Model
- Rename Fields & Tables
- Check Data Types
- Understand Data

DASHBOARD DESIGN PROCESS

STEP 3 BUILD CHARTS

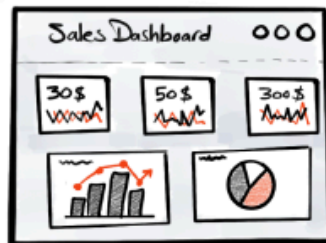


- Create Calculated Fields & Test
- Build Chart
- Format
 - Remove Lines & Grids
 - Clean up Axis & Headers
 - Coloring
 - Tooltips

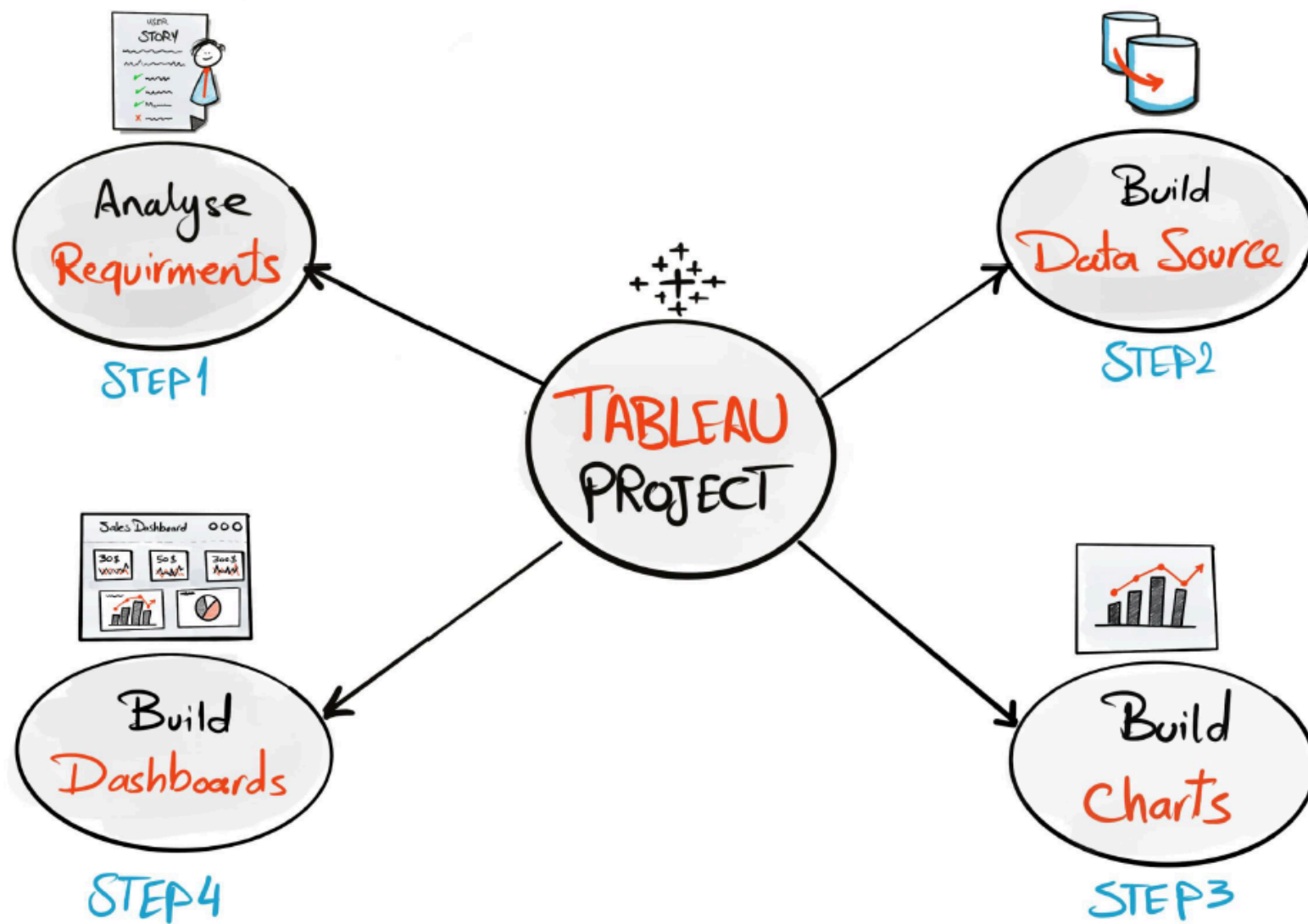
DASHBOARD DESIGN PROCESS

STEP 4

BUILD DASHBOARD



- Draw Mockup for Container
- Create Container Structure
- Put All Charts Together
- Format
 - Distribute Object Evenly
 - Format Colors, size ... etc
 - Fit "Entire View"
 - Add Legends
 - Add Spaces (inner/outer Padding)
- Add Filters & Dynamic
- Add Icons



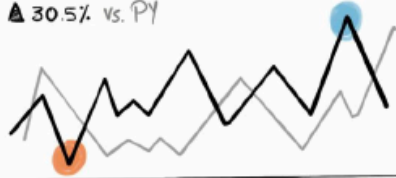


Sales Dashboard | 2023



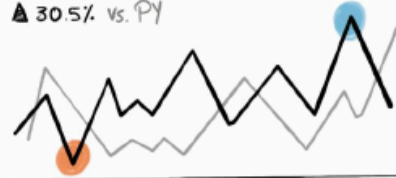
Total Sales
\$500K

▲ 30.5% vs. PY



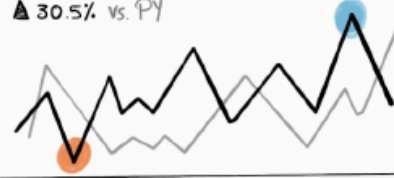
Total Profit
\$400K

▲ 30.5% vs. PY

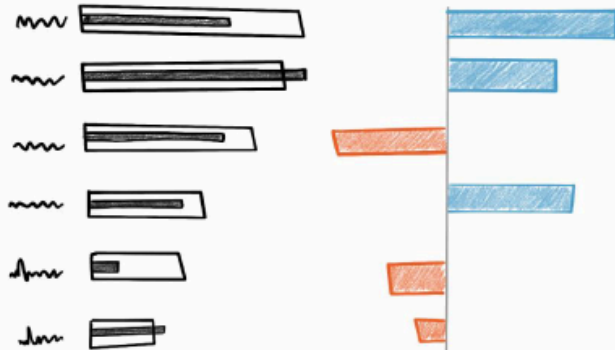


Total Quantity
\$30 K

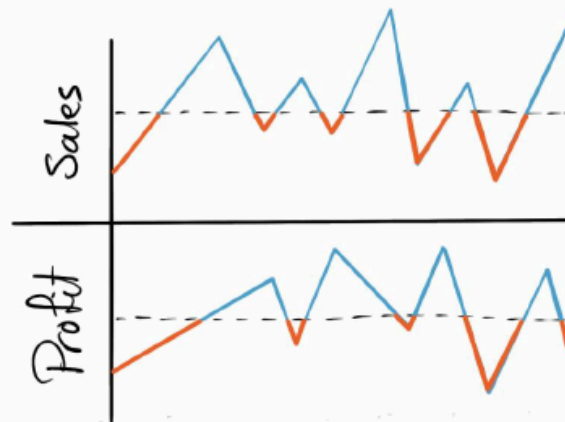
▲ 30.5% vs. PY



Sales & Profit By Subcategory



Trends over Time



Filters

Category

Sub-Category

Region

City

