Southern New Hampshire University

DAT 530 Data Dashboard Guidelines and Rubric

Overview: Excel dashboards are powerful, easy to design, and a great way to improve your Excel and data visualization skills. Because of its flexibility, you can virtually design any dashboard in Excel. To complete this assignment, you will create a data visualization dashboard by creating a pivot table for your pre-selected data. Review the steps and resources in the assignment to complete this assignment, including the resources for creating a pivot table.

Prompt: You have been asked by your manager to provide a brief report simulating a dashboard view. The report is to show the performance of small/short-term loans that were issued in the past five years. The report should consider information such as how many loans were issued by different categories and how much was issued, repaid, profited, etc. The brief report is to show the executive management audience performance using graphical representations of the data via charts and other visualization methods. Follow the steps below to develop your data dashboard:

1. Access the file sample file provided LoansIssued.xlsx found in the Assignment Guidelines and Rubrics folder. This file is a subset of the source Excel file found at Lending Club Statistics. The data used for this example has a reduced row count and has columns deleted from the original source. **NOTE:** If you are not familiar with creating pivot tables and charts in Excel, please reference Excel Training: Create PivotTables.
2. Create a Word document that will be submitted with the requirements of this assignment.
    A. Your data dashboard (page 1)
    B. Brief report summarizing the data visualization in your dashboard
3. The brief report should be presented on a single page using a landscape page format. This page format offers enough space for dashboard title and annotations and graphics of charts and tables. To set the format, from the top menu in Microsoft Word, select LAYOUT→ORIENTATION→LANDSCAPE.
4. Select a data grouping from your pivot table and insert it onto the first page of your assignment.
5. Insert a 4x1 table to insert the images/annotations. To ensure you create the proper visual effect, your table will NOT have any borders.
6. On page 2 of your document, include a 1- to 3-paragraph discussion of your approach to the problem and what performance result you expect your audience to leave with.

To complete this assignment, address the following critical elements in your submission:

A. Create a visual data dashboard (via a pivot table).
B. Include a brief description of steps used to create the dashboard information.
C. In the report, show the executive management audience performance using graphical representations of the data via charts and other visualization methods.

(Note: The information used to create the data visualization dashboard is for educational purposes only and does not represent any individual or confidential data.)

Rubric

Guidelines for Submission: Capture the visuals from Excel and arrange in a landscape page in Microsoft Word. On page 2 of your document, include a 1- to 3-paragraph discussion of your approach to the problem and what performance result you expect your audience to leave with. You may save the Microsoft Word document as PDF or submit as a Microsoft Word document.

Critical Elements	Exemplary (100%)	Proficient (90%)	Needs Improvement (70%)	Not Evident (0%)	Value
Visual Data Dashboard	Meets "Proficient" criteria and demonstrates ability to formulate and build a data dashboard using Excel with correct formatting	Submission contains an image demonstrating ability to successfully build a data dashboard in Excel with correct formatting	Submission includes image of a data compilation but lacks organization to represent effective data dashboard	Visualization analysis is unable to address the effectiveness of a minimum number of tools	20
Dashboard Compilation Steps	Meets "Proficient" criteria and includes a step-by-step description of process used to create data dashboard including justification of use of proper design elements like color selection, pie charts, and how groupings were selected	Submission includes a detailed explanation summarizing steps applied to build the data dashboard including justification of using appropriate design elements	Submission includes brief overview of data dashboard creation but requires additional supporting details to support compilation and design elements	Submission did not address how data dashboard was created	30
Data Visualization Communication Summary	Meets "Proficient" criteria and includes a detailed communication summary and visualization that aligns to the identified data	Communication summary aligns to the data dashboard visualization	Communication summary needs additional supporting criteria and analysis to demonstrate comprehension of the data visualization	Communication summary is not included in the submission	50
				Total	**100%**