



## **Video Transcript for Module 5: How to plan and design a Dashboard**

Hi, guys. So, in this movie, we'll be looking at how to plan and design a dashboard, right. And when you think about a dashboard, dashboard is best described as a simple white canvas with relevant visuals that usually gives you a summary or at a glance view of whatever you're looking at in terms of sales reports, business report or, you know, a couple of other stuff. So simply a white canvas designed to give like an at a glance view

So, in this case, what we're starting with is pretty much a blank sheet so asides from this logo, this is a blank spreadsheet. And if you had looked at some of our previous earlier courses on design layouts for the spreadsheets, you see that we had removed the, we've talked about how to remove your grid lines? And that's why this looks like a very clever white canvas. And that's because we removed the green lines from the View tab. So, your dashboard pretty much starts with a very blank white canvas

And then you can decide on how you want to design it, what sort of information you want to show and what not. So usually, a very good design for dashboards would be a situation where at the top area of the canvas, you have your slices and timeline. So, we can just put a marker here that says slices and timeline just to sort of map it out so our slicers and timeline will come into the tab part and then usually there are some visuals that are called cards or tiles.

So, you can call them cards or tiles, and usually they just convey one single information like total sales, total this or total that. So, we're going to have some cards and tiles on the left most part the sheet. Right. And then in the body of the canvas this other area, this white space area here we can have some charts. Right, so we can have some charts and other visuals. So, we can have charts, tables and

what not, so just brief information, and then we can go one step further.

So, for here, we've specified the different slices and timeline for the cards and tiles based on the data that we have here, so that we know that this is a sales report. We need the kind of information we have within the report. So, we can base on our understanding of the information, decide on what should be on the dashboard. So just coming up with something off the top of my head. We can have a card for total transaction counts.

So, transaction count, we can have another tab for sales values since this is a sales dashboard. So, we can have sales value and then we can have one more for sales volume, this is a sugar business so there is a lot of volume sales. So, we can have this and then for the charts from the report we created and remember, we're working with the module five point zero now. So if we open that case file, you will see some additional tables have been included for ease of analysis.

We now have sales by period, which was the first table we created. We also have volume sold by period and we have the reports of sales by product and then sales this is sales value by product. Sales value by product and this should be sales volume by product, so we have this different information. So, in terms of our dashboard, we might decide to have a trend chart here for sales value trend.

Right, and then we might leave some space then have sales volume trend. And the whole idea is to get different insights from this sales report that might help with decision making. So, your most valuable, valuable product might not be the one you're selling the most. You might have some highly prized products that command a large sale, but not as many volume. So different instances might come out from some of these illustrations. We might also have sales value by product distribution.

Right and you might also have sales volume by product. So this is just a very simple dashboard, the richer your data and information, the more powerful you can create visuals but here we are just trying to cover the bases, so nothing out of out of this world. So now in this simple video, we've looked at how to plan your dashboard and we mentioned that the top part of your canvas can be used for your filters so slices and timelines can be at the top.



And then by the left-hand side, you can use that for your cards or tiles, these are the main areas. And then the body of it can be for your charts and visuals. So that's how you sort of plan and design your dashboard. In the next videos we will get into the details of creating your cards, creating your charts and other visuals. So, see you then guys

