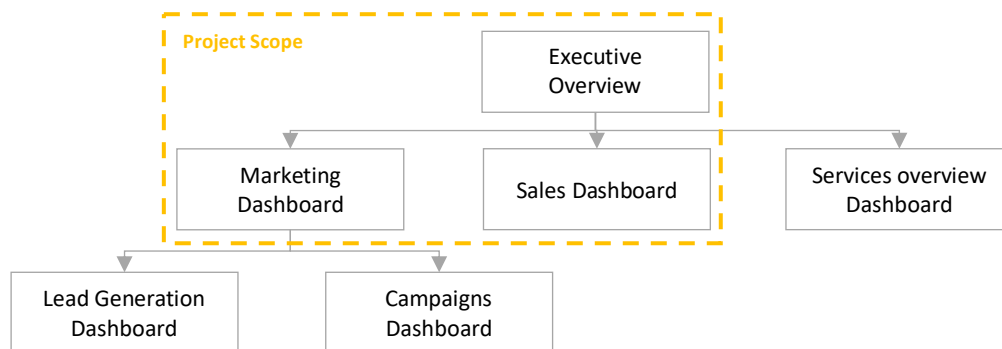


## Dashboard Planning Document

This is a template for planning the dashboard that we will develop during the Onboarding project (OBP). This will serve as a reference throughout the project and for future implementation.

To make the best out of the Onboarding Process, follow these guidelines

- Select one dashboard out of your dashboards hierarchy, and fill in the template below



- To fill in this template effectively, work with the business user who presented the business requirements.
- Examples of how to fill in the template are shown [in blue](#).

We recommend keeping this flow on future Sisense BI projects.

Let's get started...

10/09/19

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## 1. Sales Order Analysis Outline: [See notes on pages 6/7.](#)



### **Dashboard Objective:**

Describe a concrete goal this dashboard addresses

- Support rapid monitoring and analysis for Sales Orders volumes and Net Revenue by:
  - International vs. Domestic
  - Store vs. Online
  - Territory with drills to Sales Person and Top Sellers
  - Trends for Online vs. Store and International vs. Domestic
  - Top Selling Items and Units Sold
- This analysis will drive decision making to support:
  - Sales and Marketing focus:
    - Store vs. Online
    - International vs. Domestic
    - Regional Resource Allocations
  - Focus on Top Selling Items to adjust stocking levels.
  - Identification of Top Sales Persons in Stores and Top Items by # of Orders and Revenue by Territory. This will support rewarding Top Sales Persons and identify the Top Sellers at the Territory level.



**Target Audience:**

- Power Users: The business user who presented the business requirements for this dashboard and will provide feedback throughout the process  
[Director Sales and Marketing](#)
- Beta users: End users who will participate in UAT during the OBP  
[Ray and Rachel from the sales/marketing team](#)
- End users: Group/ individual users  
[Sales and Marketing Team](#)
- Concurrent users: How many users will be accessing the dashboards concurrently?  
[Up to 10 users](#)



**Call to Action:**

Describe the short-term actions that the end users should take based on this dashboard

- [Monitoring Orders and Revenue by Territory by Online/Store and domestic vs. international to plan for growth in each Territory.](#)
- [Adjust Sales and Marketing focus \(and possibly spend\) by Territory and Online vs. Store.](#)
- [Early warning of stock sales volumes to help ensure the Top 10 Sellers stay in stock for immediate shipment. Use this dashboard to identify top sellers. Then go to the Supply Chain dashboard to evaluate stock levels and minimum inventory.](#)



**Data Update frequency:** [Every 8 hours](#)



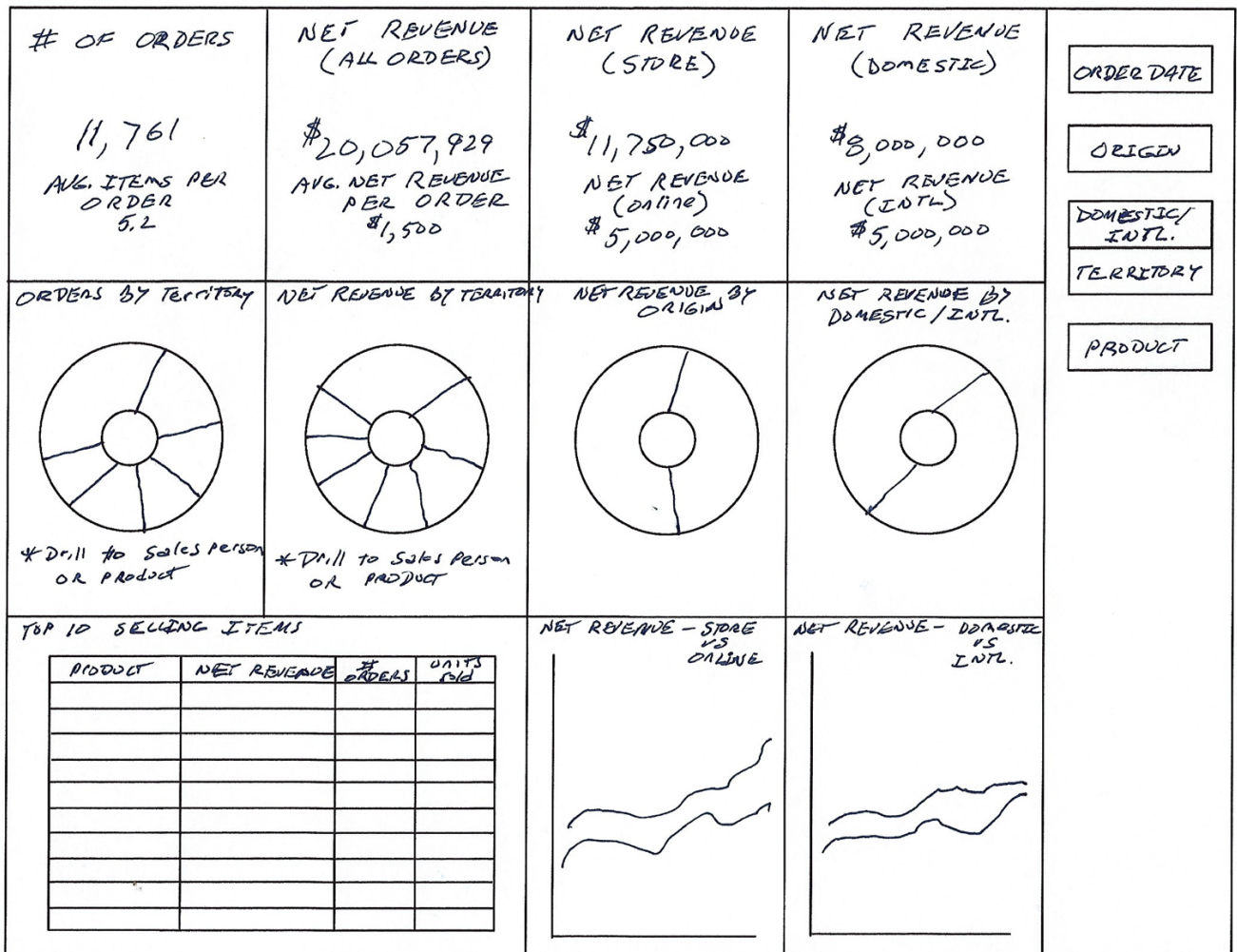
**Time line:**

- [UAT Date: Nov. 4, 2019](#)
- [Go live Date: Nov. 18, 2019](#)

## 2. Dashboard Mockup

Design your widgets' visualization and the dashboard layout. Use the mockup to evaluate the design with the power user (use the following [link](#) to get references for dashboard examples).

- Reviewed draft with Director Sales and Marketing and Team. They requested to add the Top 10 Sellers pivot to dashboard. Updated document and mockup. Second quick review and approved.
- User have 24" to 27" monitors. This drove dashboard design considerations including number of widgets and placement. Mobile was not considered a priority for this dashboard design.



### 3. KPI Architecture

Fill in your KPIs and associate them with the required data. Select the KPIs that you want to set up Pulse Alerts for.

KPI*	Measure		Dimension*		Comments
	Formula	Source table/ view	Content	Source table/ view	
# of orders	<i>count([Fact Sales Orders_Items].[# of unique SalesOrderID]))</i>	Fact Sales Orders_Items	<i>Order Date, Origin, Domestic/Int., Sales Territory, Product, Sales Person</i>	<i>Dim Order Date, Dim Order Origin, Dim Domestic/Intl., Dim Sales Territory, Dim Product, Dim Sales Person,</i>	
Avg items per sales order	<i>(([Fact Sales Orders_Items].[Total ProductOrderQty] / ([Fact Sales Orders_Items].[# of unique SalesOrderID]</i>	Fact Sales Orders_Items	<i>Order Date, Origin, Domestic/Int., Sales Territory, Product, Sales Person</i>	<i>Dim Order Date, Dim Order Origin, Dim Domestic/Intl., Dim Sales Territory, Dim Product, Dim Sales Person,</i>	
Net Revenue	<i>(([Fact Sales Orders_Items].[Total ProductTotalPrice])</i>	Fact Sales Orders_Items	<i>Order Date, Order Origin, Domestic/Int., Sales Territory, Product, Sales Person</i>	<i>Dim Order Date, Dim Order Origin, Dim Domestic/Intl., Dim Sales Territory, Dim Product, Dim Sales Person,</i>	
Avg. Net Revenue per Order	<i>(([Fact Sales Orders_Items].[Total ProductTotalPrice]) / ([Fact Sales Orders_Items].[# of unique SalesOrderID])</i>	Fact Sales Orders_Items	<i>Order Date, Origin, Domestic/Int., Sales Territory, Product, Sales Person</i>	<i>Dim Order Date, Dim Order Origin, Dim Domestic/Intl., Dim Sales Territory, Dim Product, Dim Sales Person,</i>	
Units Sold	<i>(([Fact Sales Orders_Items].[Total ProductOrderQty])</i>	Fact Sales Orders_Items	<i>Order Date, Origin, Domestic/Int., Sales Territory, Product, Sales Person</i>	<i>Dim Order Date, Dim Order Origin, Dim Domestic/Intl., Dim Sales Territory, Dim Product, Dim Sales Person,</i>	

**f\* Terminology:**

- Key performance indicators - Business metrics which support decision making. KPIs are used to evaluate factors which are crucial to achieve the business objectives.

- Dimension – (AKA as Filters/ Slicers/ X axis/ Category) Business entities that categorizes measures to enable users to answer business questions. Commonly used dimensions are people, products, place and time.

## 4. Data Requirements

Specify the required data to support your analysis.

**History Depth:** 5 Years

#	Data Source type	Table Name	Description	Max # of records
1	CSV	SalesOrderHeader	One row for each sales order with metadata.	~ 1M
2	CSV	SalesOrderItems	Individual items of a sales order.	~ 1M
3	CSV	SalesTerritory	Identifies the sales territories to support regional analysis.	~ 1M
4	CSV	ProductionProduct	Lists the Products to support product analysis.	~ 1M
5	CSV	SalesPerson	Lists Store Sales Persons with metadata.	~ 1M
6	CSV	DimDates	Source table for dates with datenum column to support daily joins.	~ 1M

## 5. Security and Additional Constrains (Optional)

Describe the applicable data security restrictions and any other constrains.

- EC sharing with All Users
- EC Data Security: All users. Company wants to empower staff to understand the company's performance. This will change in the future if they decide to create management only dashboards.

## 6. Notes

- Wasn't sure what the ElastiCube instruction 5<sup>th</sup> bullet meant ("Dates applicable to current time"), but I adjusted the Order Dates by 5 years in the EC so the latest date is in 2019.
- Assumed I needed to do currency conversion. I imported Sales.Currency.Rate to support that, but when I looked at the CurrencyRateID codes in SalesOrder, all were USD to the intl. currency. Also,

when the CurrencyRateID was null, the Territories were all in the US. So apparently all the revenue was recorded in USD.

- I created several validation tables to verify widget results. I left them in the EC. Typically, once an EC goes live, I delete them or comment out the code and set to 'select 1'. That way they are readily available in the future if needed again.
- I also left in a few tables I brought in to review the data. Since all the tables are small, I left them in anticipation of the next dashboard. If they were large, I would delete anything unneeded before go-live.
- No plugins were used or harmed during this exercise. 😊😊😊😊😊