

# Data Dashboard: Process Overview

## **Phase 1. Designing a data dashboard**

- Determine your audience(s)
- Identify the key questions you would like to address
- Identify the key variables you would like to examine
- Identify the key relationships between variables you would like to examine
- Determine the time period your dashboard will capture
- Select the types of visualizations to be included in your dashboard

## **Phase 2. Building out a data dashboard**

- Identify the data sources your will need to access
- Extract and clean data
- Link data (if necessary)
- Select the dashboard software (e.g. Tableau, Power BI) that is the best fit for your team
- Build a summary file with key variables and relationships to export to software
- Implement dashboard design

## **Phase 3. Publishing a data dashboard**

- Determine the level of detail audiences will have access to (internal, external, etc.)
- Provide dashboard codebook that defines terms and acknowledges any limitations
- Determine the level of frequency for updating
- Consider presenting the dashboard to key audiences or providing training
- Integrate dashboard into operational and reporting practices