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Getting started with dashboards

SEA23

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v.07/16

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Meet your speaker

Kendra Michaels

Senior Solutions Consultant

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Where’s the information you need?

The top challenge facing knowledge workers today is quickly finding the right answers and information to do their jobs

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Make information easy to find

Dashboards help you organize, execute and present your work in one place

No more digging through old emails, or trying to remember which system that one file or report data was shared in.

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What you'll learn

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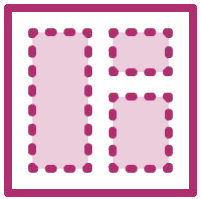
What you'll learn

How and when to use dashboards



Different dashboard widgets and what they do

How to sketch and plug information into a dashboard

How and when to use dashboards

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“There is something almost quite

magical

about visual information.”

- David McCandless, Founder, Information is Beautiful

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“I haven’t yet found a solution or use case that didn’t benefit from a dashboard. However, the content all depends on what needs to be said.”

“I haven’t yet found a solution or use case that didn’t benefit from a dashboard. However, the content all depends on what needs to be said.”

Kendra Michaels

Senior Solutions Consultant, PMP, general rockstar

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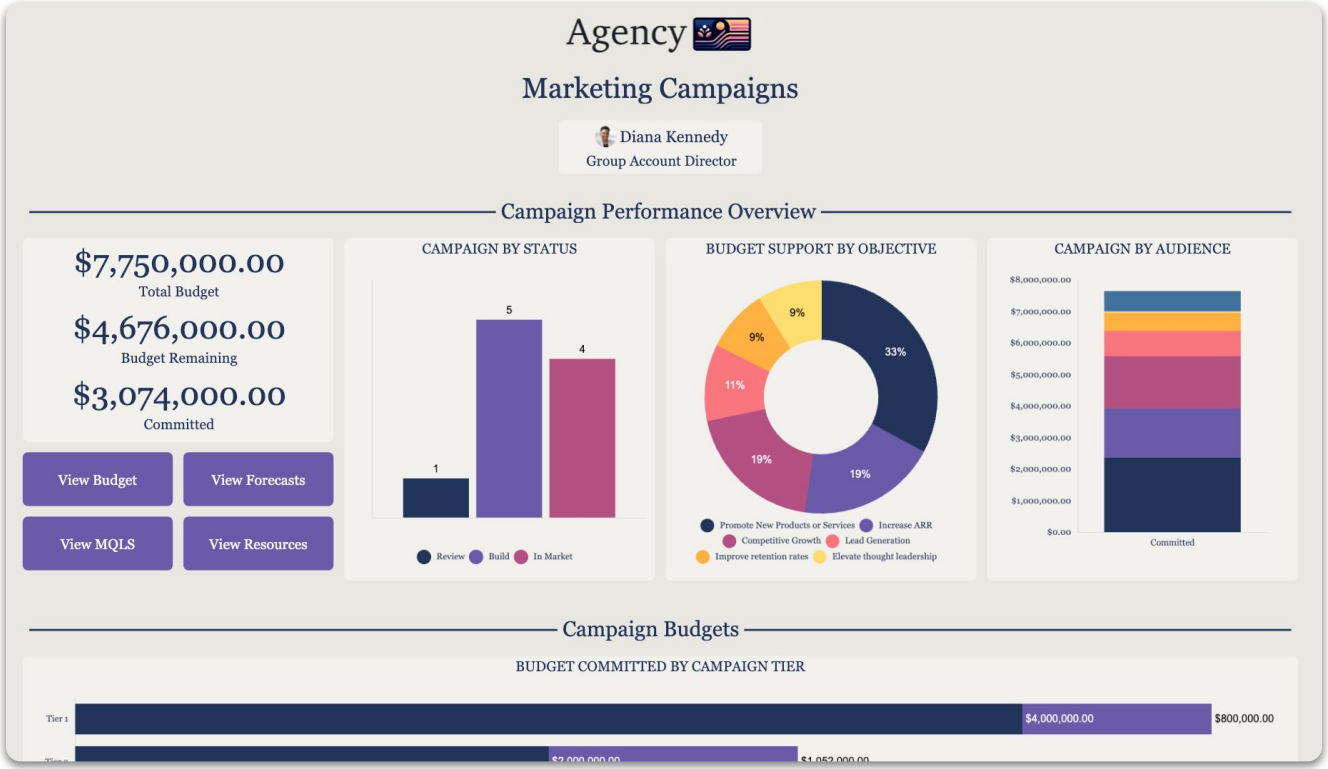
Types of dashboards



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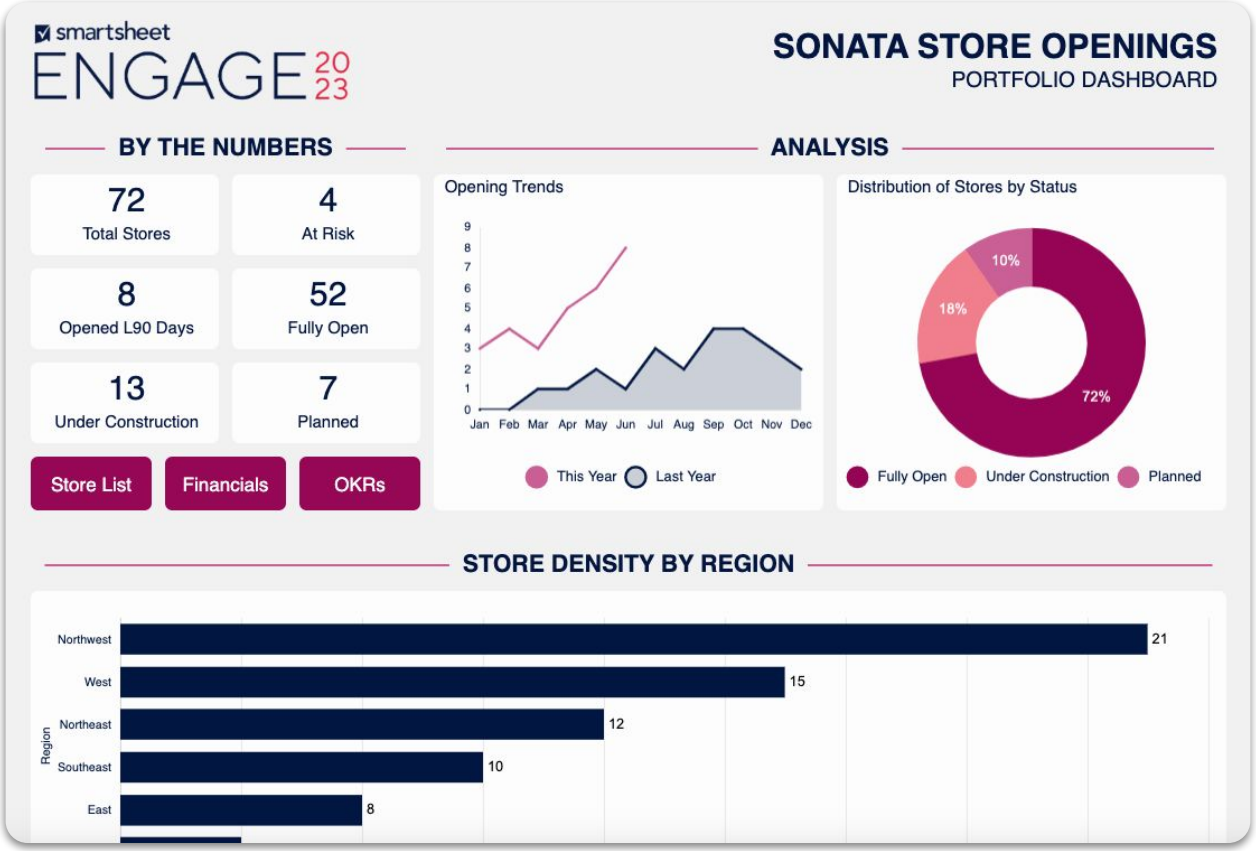
Types of dashboards



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Types of dashboards

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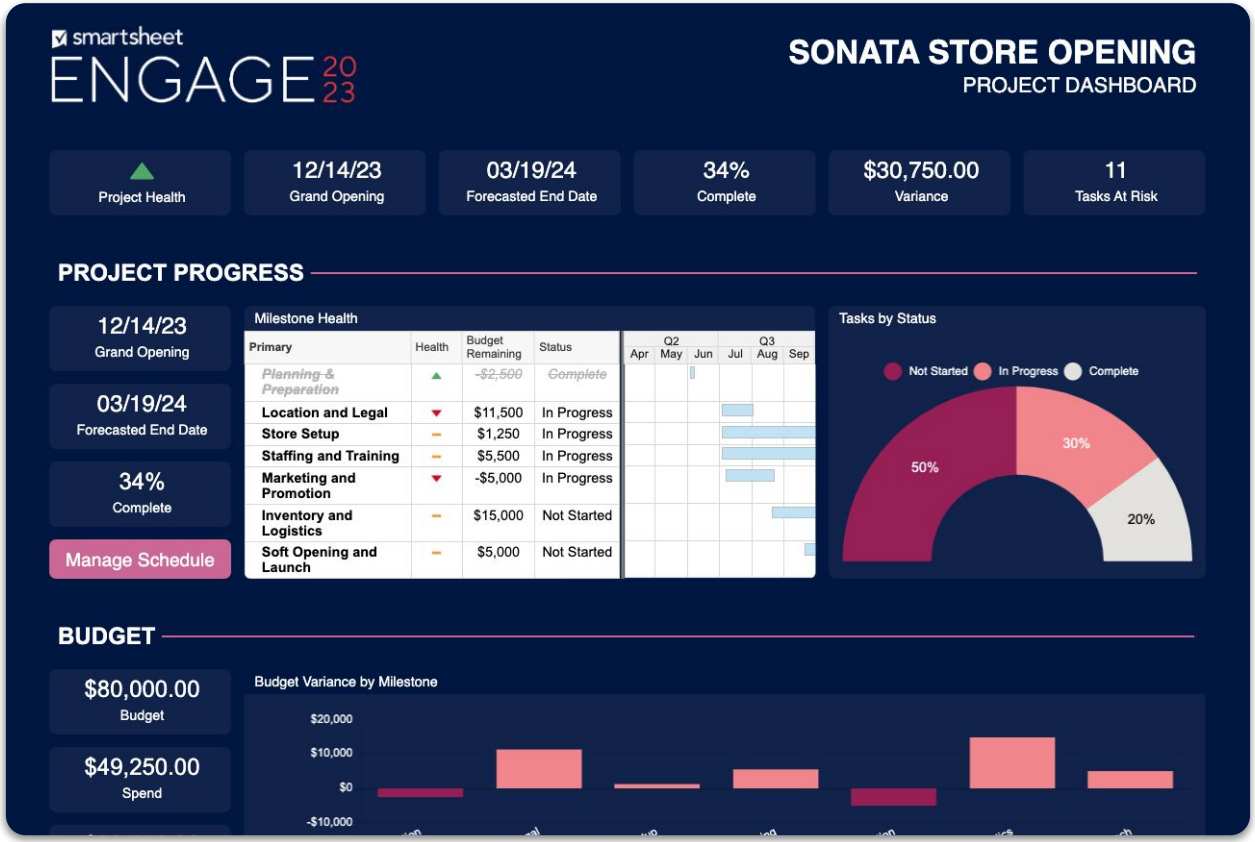
Types of dashboards



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Widget types

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Budget

Title

Labels, buttons, dividers

Add a title to your dashboard

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Metric

Key dates, KPIs, contacts

Display key cell values from a sheet

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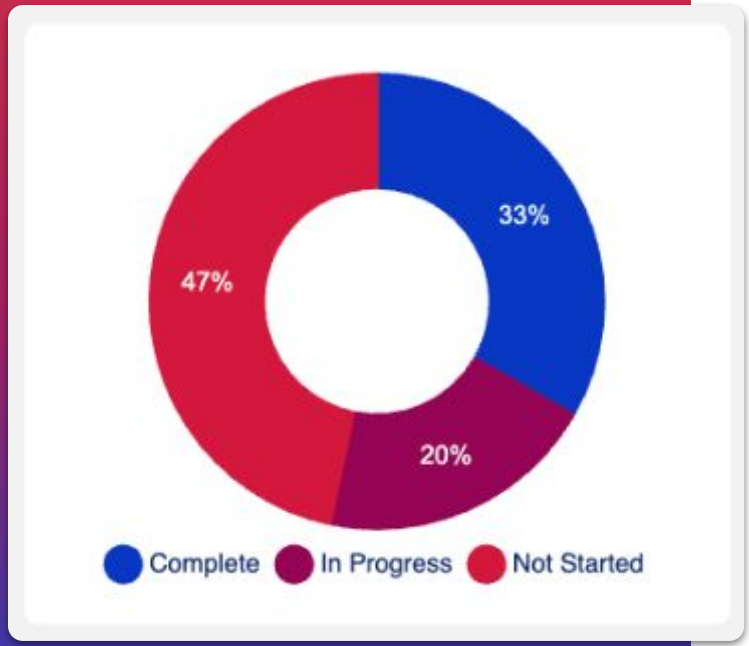

Chart

Data visualizations, progress, performance

Create a meaningful chart from a sheet or report

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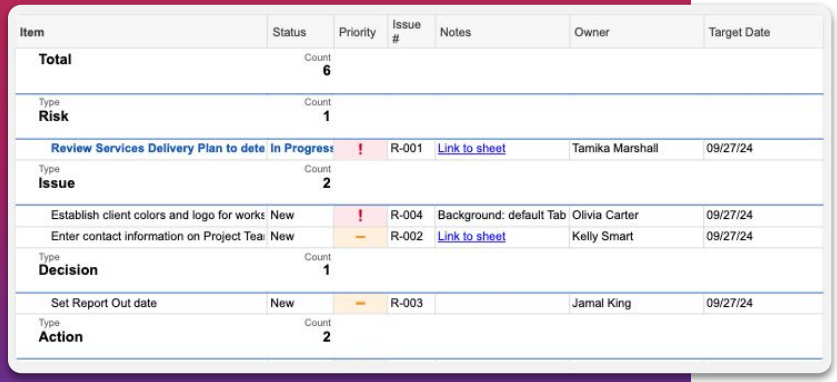

Item	Status	Priority	Issue #	Notes	Owner	Target Date
Total	Count 6					
Type **Risk**	Count 1					
Review Services Delivery Plan to dete	In Progress	!	R-001	Link to sheet	Tamika Marshall	09/27/24
Type **Issue**	Count 2					
Establish client colors and logo for works	New	!	R-004	Background: default Tab	Olivia Carter	09/27/24
Enter contact information on Project Tea	New	–	R-002	Link to sheet	Kelly Smart	09/27/24
Type **Decision**	Count 1					
Set Report Out date	New	–	R-003		Jamal King	09/27/24
Type **Action**	Count 2					

Report

Project lists, high risk watchlist

Display a report on the dashboard

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Shortcut

Reference documents, SOPs, external systems

Link to commonly accessed files, URLs, and Smartsheet items

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Image

Progress or product photos, logos

Add a company logo or other image to your dashboard

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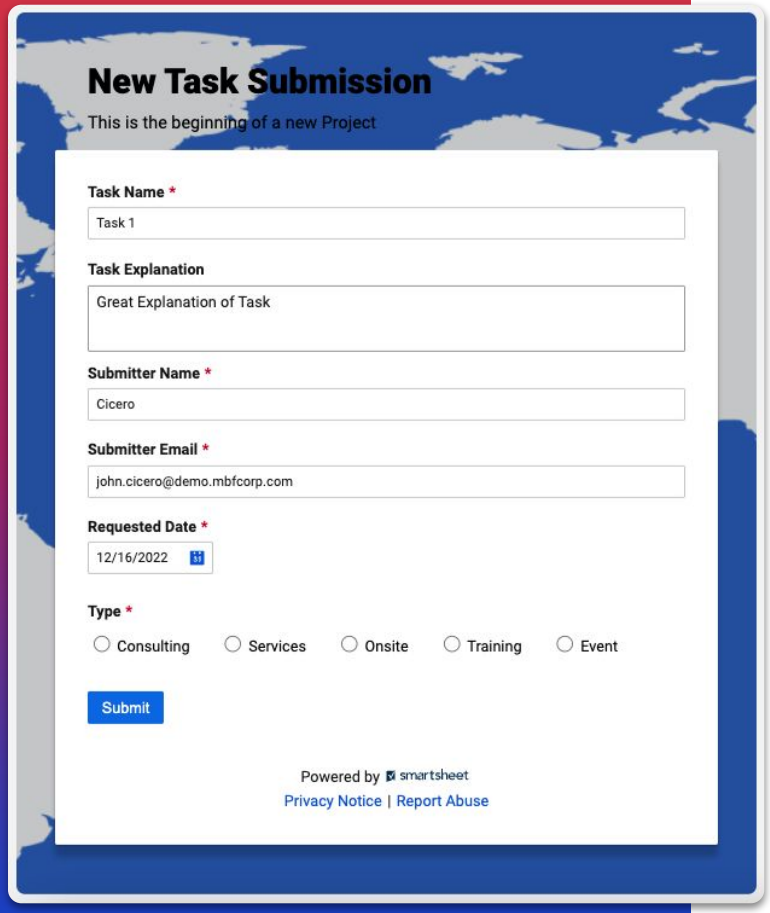

Web Content

Resource Management, forms, Tableau/PowerBI, embedded video

Add content to your dashboard from external sources

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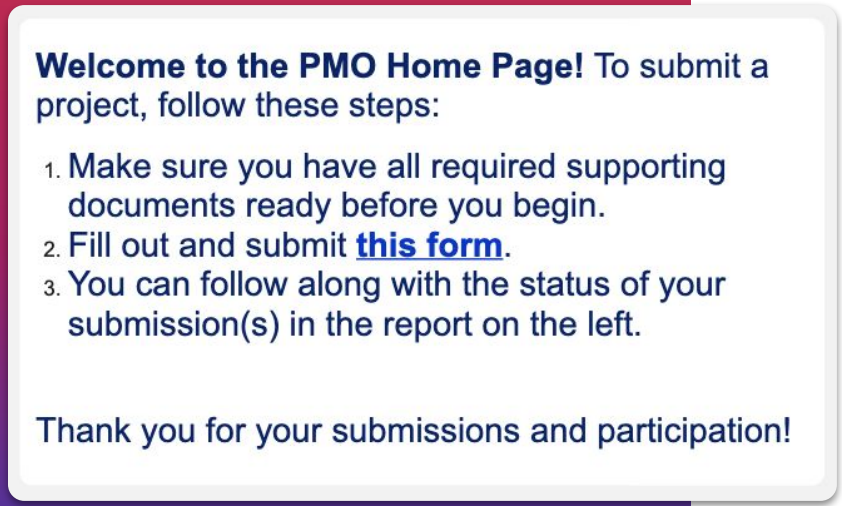

Rich Text

Annotations, captions, instructions

Enter richly formatted text for updates or instructions

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Important features

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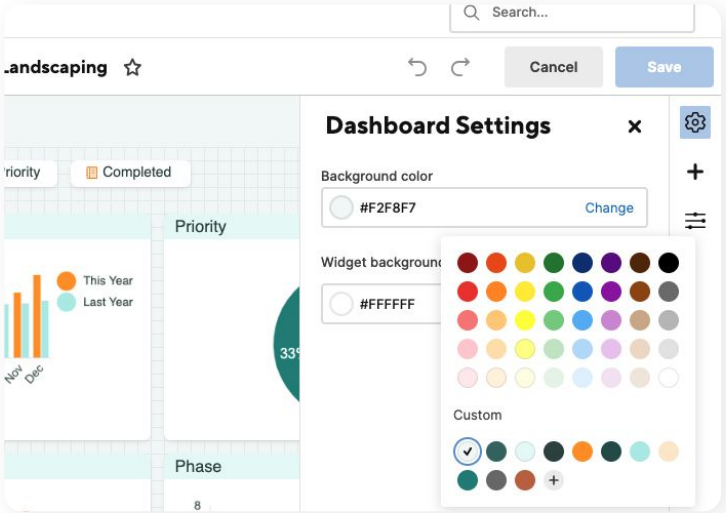
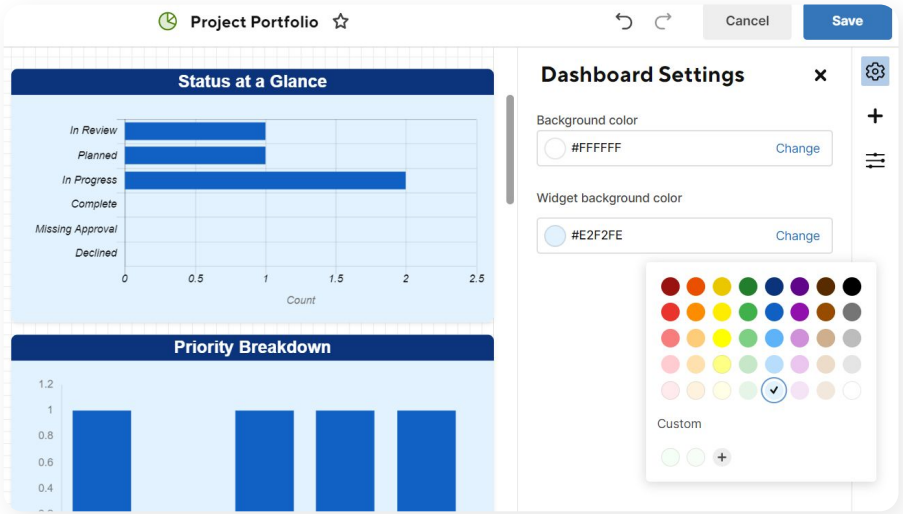
Background colours

Dashboard and widget control





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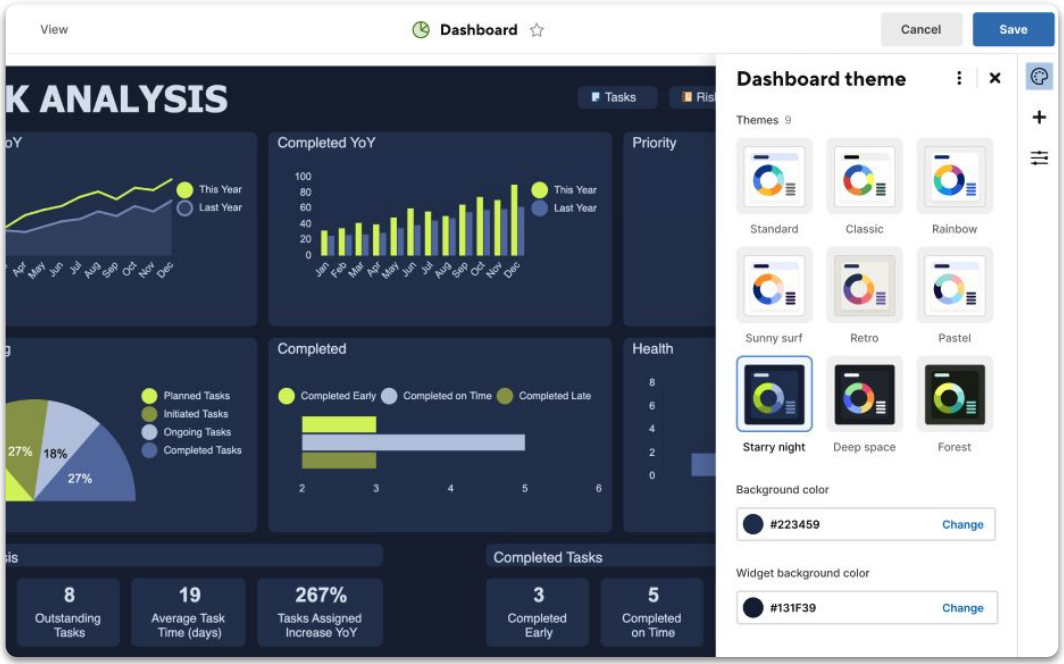
One-click apply full colour

Choose from **nine** new preset themes



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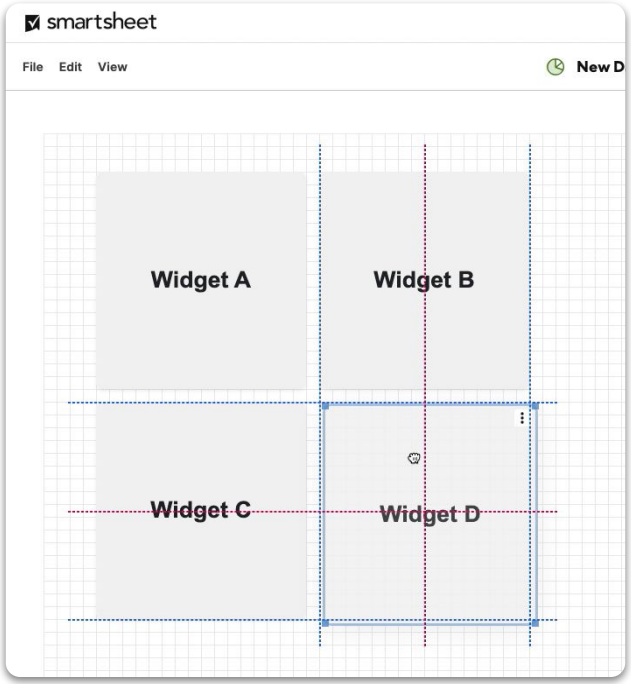
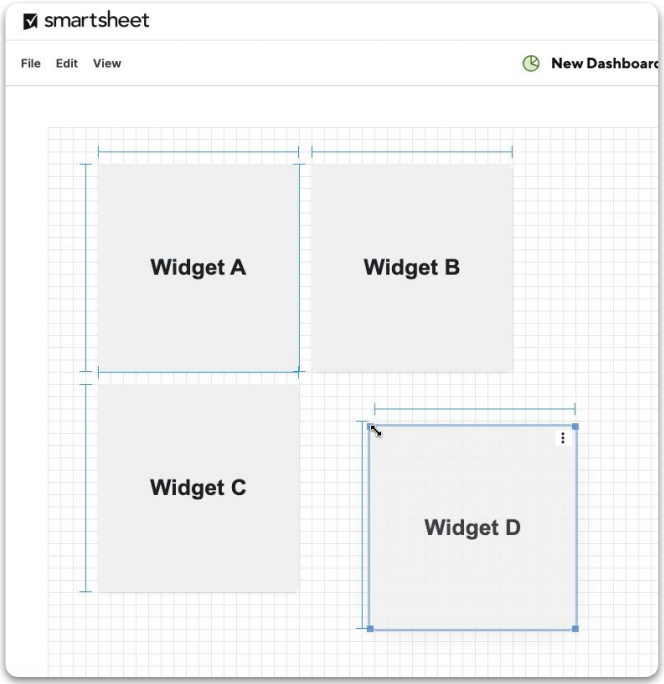
Widget alignment indicators

Ensure consistent spacing and even sizing





Multi-widget editing

Edit multiple widgets at the same time

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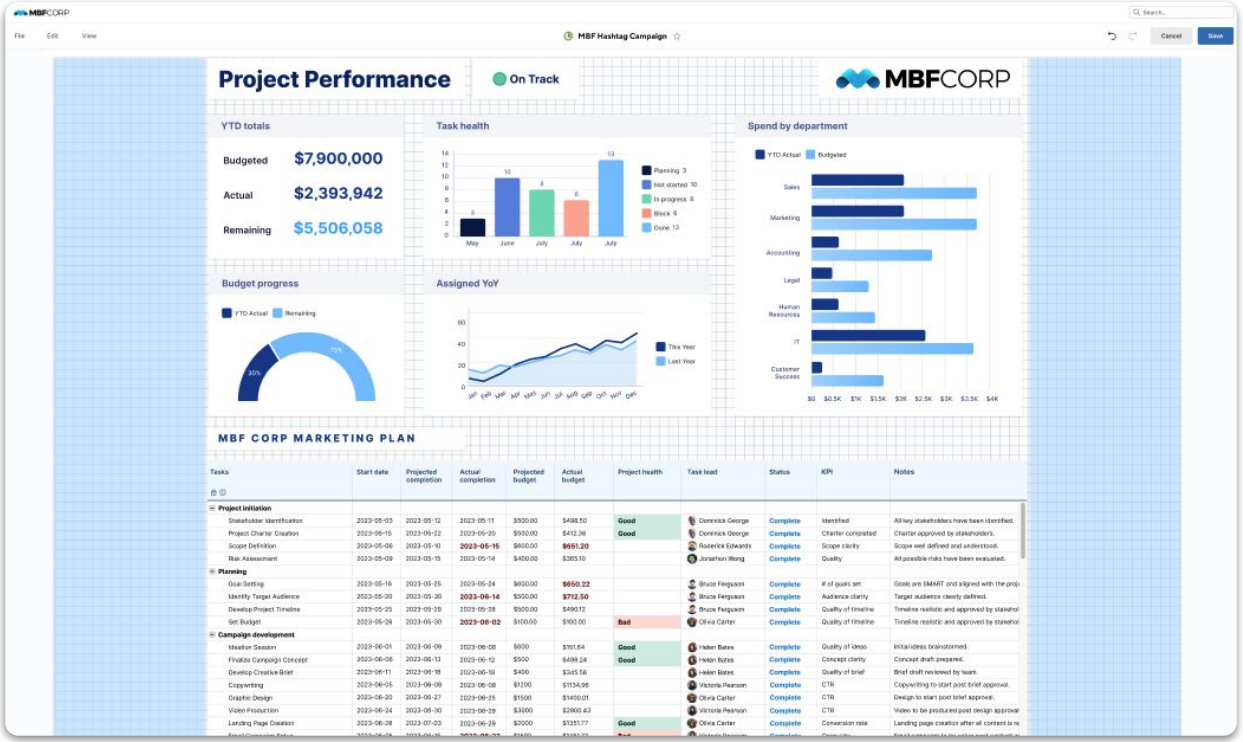
Wider canvas

Expand your dashboard



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Sketching your dashboard and adding information

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Let’s try this on a

dashboard

in the app

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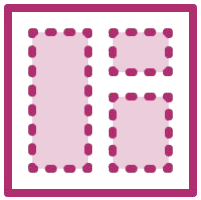
What you learned

How and when to use dashboards



Different dashboard widgets and what they do

How to sketch and plug information into a dashboard

Register for upcoming User Groups

Continue to expand your Smartsheet skills and connections by attending a User Group.

Smartsheet User Groups

- **Discover** how others are using Smartsheet
- **Network** with the Smartsheet team and your peers
- **Virtual** and **in-person** events around the globe

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Next steps...

- Start sketching your dashboard!
- Read the Smartsheet dashboard design series!
- Go to one of the other dashboards sessions at ENGAGE

Take the survey

We'd love to hear your thoughts on the session.

Open this session in the mobile app, click "Survey," and answer two questions — it's that easy!

Thank you.

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Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.

@smartsheet

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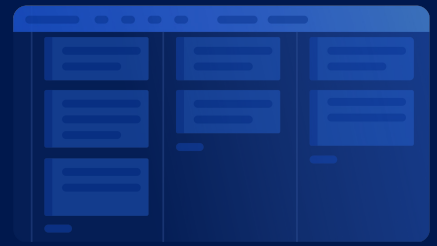

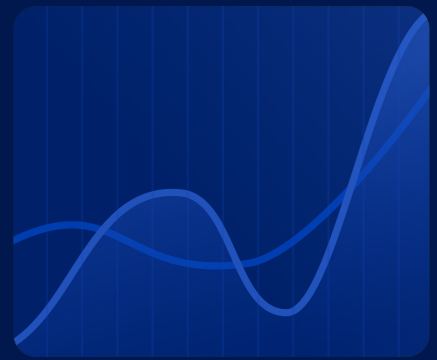

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