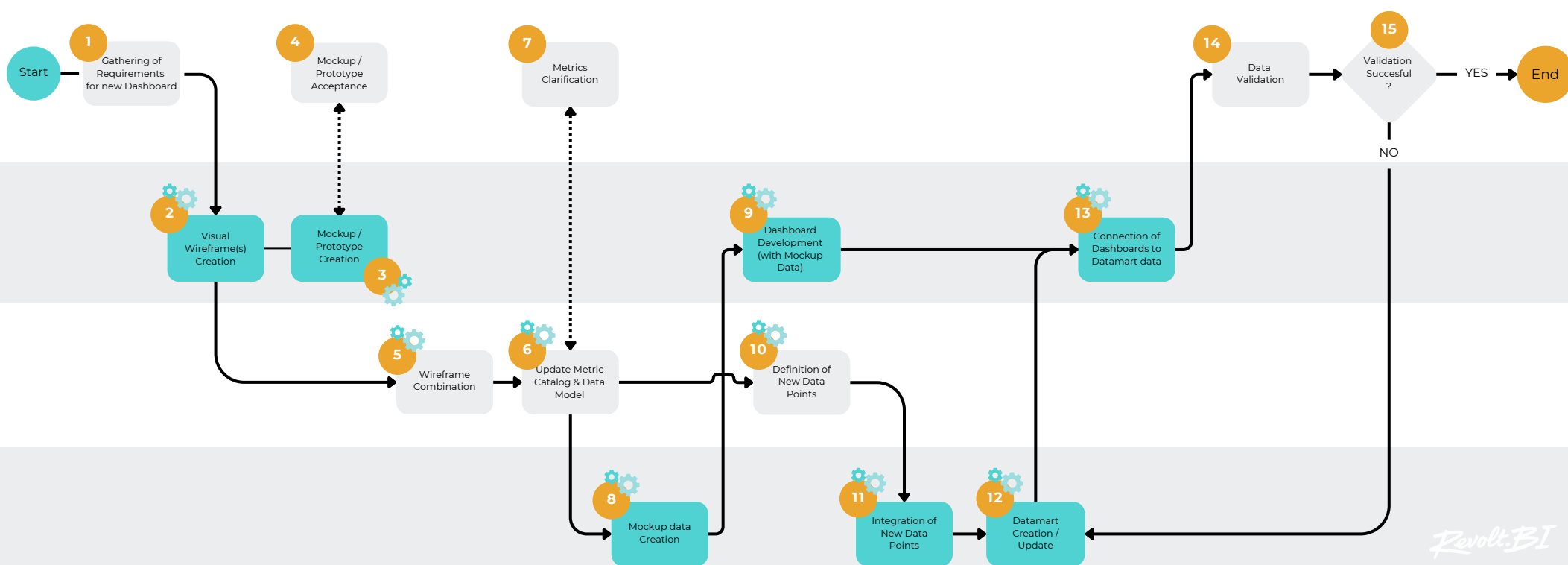




Revolt.BI

1 Gathering Requirements for New Dashboard
The first step is requirements gathering, in which the submitter of the request (business owner of the project) works with a front-end specialist to conceptualize the dashboard.

- **Information Gathered:** The business owner outlines their vision and works with the front-end specialist to create a wireframe.
- **Responsibility:** Business owner of the project.

Note: Effective communication between the business owner and the front-end specialist is crucial to ensure that all requirements are accurately captured.

3 Mockup / Prototype Creation
The design phase where the initial visual representation of the dashboard is created, we are using FIGMA.

- **Terminology:** Mockup and prototype are synonymous.
- **Tools:** FIGMA.

Note: Regular iterations and feedback at this stage can significantly streamline subsequent development phases.

5 Wireframe Combination
The Tech Lead consolidates multiple wireframes into a unified structure, ensuring no redundancies.

- **Process:** Combines wireframes, eliminates redundancies, ensures accurate mappings.
- **Review:** Reviewed with the business owner during Metrics Clarification.

Note: This consolidation helps streamline the development process and prevents duplication of effort.

2 Wireframe(s) Creation
Creation of wireframes involves detailing metrics and data points using a simple matrix format.

- **Tools/Methods:** Basic Excel or Google Sheets. Rows list metrics, and columns list data points used for calculations or filters.
- **Participants:** Business owner and Front End specialist.

Note: This step ensures a clear visualization of how data points contribute to the desired metrics, providing a blueprint for further development.

4 Mockup / Prototype Acceptance
The business owner reviews and approves the mockup based on their preferences and satisfaction.

- **Criteria:** Based on the customer's satisfaction and preference.
- **Final Decision:** Business owner.

Note: Ensuring the mockup aligns closely with the business owner's vision reduces the risk of major changes later in the process.

6 Update the Metric Catalog

- The metric catalog is updated to include all finalized metrics and data points.
- Contents: Similar to wireframe; includes all metrics and data points.
- Frequency: Updated upon dashboard completion, with possible updates during development.

Note: Keeping the metric catalog up-to-date is crucial for maintaining consistency and accuracy across dashboards.

 **7 Metrics Clarification**
Clarification and finalization of the metrics the customer wants to see on the dashboard.

- **Clarified Metrics:** Metrics desired by the business owner, reviewed after wireframe combination by the tech lead.
- **Output:** Metric catalog.

Note: This step should ensure all metrics are accurately defined and understood before proceeding to data integration.

 **8 Mockup Data Creation**
Creating mockup data enables the front-end development of dashboards without waiting for real data integration.

- **Required Data:** Mockup data for all data points and metrics.
- **Generation:** Random mockup data are generated using our Revolt BI custom *dbt* extension.

Note: Mockup data allows for parallel progress in front-end development and back-end integration.

Pro tip: To generate mockup data, we built our *dbt* package, but alternatively use Mockaroo: www.mockaroo.com

 **9 Dashboard Development (Mockup Data)**
Developing the dashboard using mockup data in tools like Tableau or Power BI.

- **Tools:** Tableau or Power BI.
- **Responsibility:** Front-End specialist.

Note: Using mockup data ensures that the dashboard design is ready for real data integration as soon as it becomes available.

 **10 Definition of New Data Points**
Defining new data points after the clarified and approved metrics.

- **Criteria:** Defined after business owner approval.
- **Validation:** By end users and the system vendor/provider.

Note: Accurate definition and validation of data points are critical for ensuring data integrity.

 **11 Integration of New Data Points**
Integrating new data points into the system as per the requirements provided by the business owner.

- **Process:** Back-end developer handles integration; data provided by the vendor.
- **Tools:** Primarily *dbt* for transformations.

Note: Flexibility in integration methods ensures compatibility with various data sources.

 **12 Datamart Creation/Update**
Creating or updating the datamart to include new data points and metrics.

- **Structure:** Follows L0-L3 structure: L0 (raw data), L1 (transformed data), L2 (general data model), L3 (datamart).
- **Update Frequency:** Daily, adjustable as needed.

Note: A well-structured datamart facilitates efficient data retrieval and analysis.

 **13 Connecting Dashboards to the Datamart Data**
Connecting the dashboards to production data after development with mockup data.

- **Process:** Switch data sources from mockup to production data.

Note: Ensuring seamless transition from mockup to real data is vital for the final dashboard performance.

 **14 Data Validation**
Validating the data by comparing system data with manual calculations.

- **Checks:** Customer compares system data with manual calculations.
- **Responsibility:** Business owner (solution owner).

Note: Thorough validation ensures the dashboard's accuracy and reliability.

 **15 Validation Successful?**
Ensuring the final validation of the data and making necessary updates if validation fails.

- **If Not Successful:** Return to Step 10, L3 (datamart), for updates.
- **Revalidation Steps:** Share the new version with the customer and await feedback.

Note: Iterative validation and updates help maintain high data quality and your customer satisfaction.