NACM'S 129TH CREDIT CONGRESS & EXPO Cleveland MAY 18-21, 2025

Designing Dynamic Data Dashboards

Presented by: Rebekyah Brewer

Date: May 21, 2025

Session: #37073

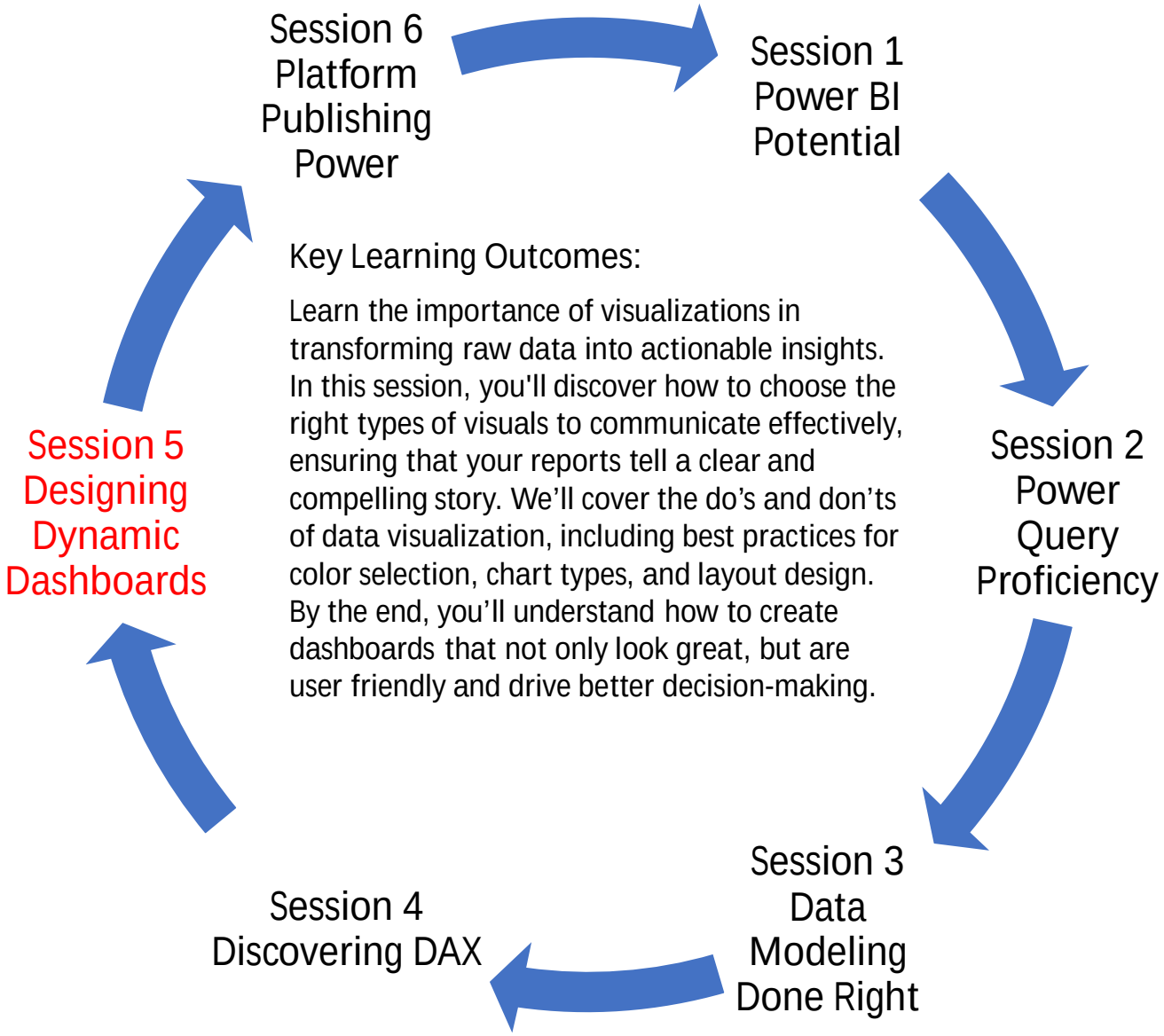
Session 5 Files Download:

Designing Dynamic Dashboards

Password: NACM2025

https://tinyurl.com/NACMDynamicDashboards

Link Expiration: 6/18/2025


Session 6
Platform
Publishing
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Proficiency
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Done Right
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Designing
Dynamic
Dashboards
Key Learning Outcomes:
Learn the importance of visualizations in transforming raw data into actionable insights. In this session, you'll discover how to choose the right types of visuals to communicate effectively, ensuring that your reports tell a clear and compelling story. We'll cover the do's and don'ts of data visualization, including best practices for color selection, chart types, and layout design. By the end, you'll understand how to create dashboards that not only look great, but are user friendly and drive better decision-making.

Prerequisites – Technical

Software Requirements

- Power BI Desktop (Free) – Power Query is built into Power BI for data transformation.
- Windows OS (Windows 10 or later recommended) – Power Query in Power BI is optimized for Windows.

Optional:

- Power BI Service (Pro or Premium Per User License) – If publishing reports online, you'll need a Power BI account

Prerequisites – Technical

Computer Capabilities & Performance Considerations

Power Query processes data transformations, and performance can be impacted by your system specs.

- RAM – 8GB minimum; 16GB+ recommended for handling large datasets.
- Processor – Intel i5/i7 or AMD Ryzen 5/7 or higher for better performance.
- Storage (SSD Recommended) – Faster SSD drives improve data processing speed compared to HDD.
- Internet Speed – If working with cloud data, a stable internet connection is necessary.

Prerequisites – Experience

Before diving into Data Visualizations, a beginner needs a good grasp of:

Basic Understanding of Power BI

- Power BI Desktop: Know how to import data, create visualizations, and use different report elements.

Excel Charts (Optional but Not Necessary)

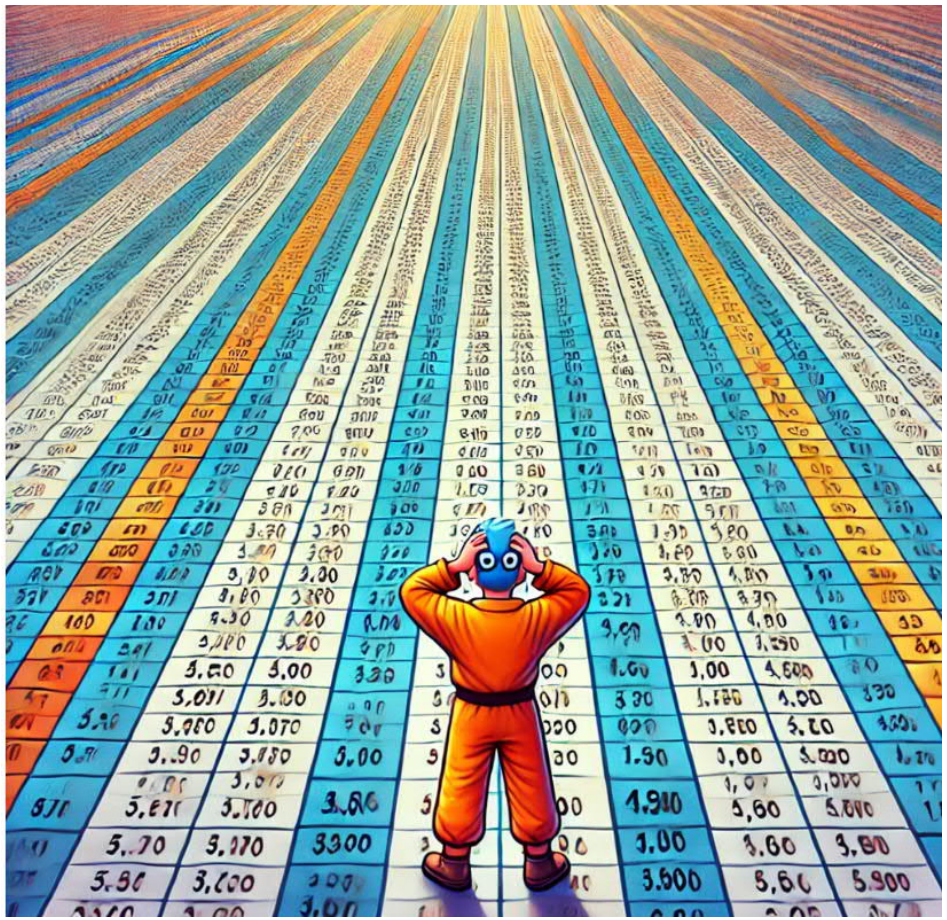
- Excel Pivot Tables & Slicers
- Excel Chart Building

Who is Building Dynamic Data Dashboards For?

	User Group	How Power BI Benefits Them
1	Power BI Users	Anyone building Power BI dashboards and creating custom calculations or customizing visuals.
2	Excel Data Analysts aka Data Wizards	Those who want create Excel Reports, Pivot Tables, Slicers and Dynamic Excel Dashboards already.
3	Financial Analysts, Accountants, Credit Managers & Sales Teams	Dashboards are useful for visualizing and interacting with financial trends, metrics, forecasts, and alerts in Power BI . Analyzing sales trends, seeing year-over-year comparisons, and customer segmentation, AR Portfolio, Payment Trends and sharing with others.
4	Self-Service BI User	Business users who need to analyze and share information and reports.

Designing Dynamic Data Dashboards
Session Overview

- Introduction & Prerequisites
- What is a Dashboard?
- Why Design Matters
- Power BI Visuals Overview
- Example Power BI Reports
- Dynamic Dashboard Design Techniques
- Q&A Further Resources



What is a dashboard?

“A dashboard is a visual display of the most important information needed to achieve one or more objectives, consolidated and arranged on a single screen so the information can be monitored at a glance.”

- Dashboard Confusion." Intelligent Enterprise, March 2004.

Why Design Matters

Enhances Data Clarity & Comprehension

- Bad design obscures insights, making it hard for users to extract meaning from data. However a well-structured dashboard will:

  - Prioritizes key metrics so users don't get lost in irrelevant details.
  - Uses the right visuals for the right data (e.g., bar charts for comparisons, line charts for trends).
  - Eliminates clutter and noise by removing unnecessary, distracting & disturbing elements.

Why Design Matters

Result: Increases Efficiency & Decision-Making Speed

Executives and analysts don't have time to dig through reports. They need insights at a glance.

- A structured layout with high-level KPIs at the top and details below improves scanning speed.
- Interactivity (filters, drill-throughs) lets users quickly dive deeper if needed without digging.
- Clear meaningful color coding (e.g., red for risks, green for healthy trends) speeds up interpretation for immediate interpretation.

Why Design Matters

Reduces Data Over Load

A messy dashboard forces users to work harder to find meaning in data. Mental overload leads to misinterpretation or avoidance of reports altogether and procrastination.

- Minimalist design reduces distractions.
- Consistent fonts, colors, and spacing make dashboards easy and pleasing on the eyes.
- Simple, intuitive navigation (clear labels, tooltips, and drill-throughs) helps users navigate & focus.

“Elegance in communication is often achieved through simplicity of design.”

– Stephen Few

Why Design Matters

Builds Trust in Data & Insights

Users must trust the dashboard before they act on its insights.

- A well-organized dashboard signals accuracy and professionalism.
- Clear definitions & transparent calculations reduce confusion.

Why Design Matters

Prevents Errors & Misinterpretations

Poor design can lead to incorrect conclusions that affect business decisions.

- Inconsistent formatting (e.g., different date formats) can cause confusion.
- Poorly labeled axes or missing legends make graphs misleading.
- Improper use of visual elements (e.g., pie charts with too many segments) distorts data.

Why Design Matters

Supports Performance & Scalability

A well-designed dashboard is optimized for speed and efficiency, ensuring:

- Quick load times (by reducing unnecessary visuals, optimizing DAX, and pre-aggregating data).
- Scalability to handle large datasets without crashing or lagging.
- Efficient filtering & drill-downs so users don’t get stuck waiting for queries to run.

Why Design Matters

Good Visuals Speak for Themselves and are surrounded by supporting context.

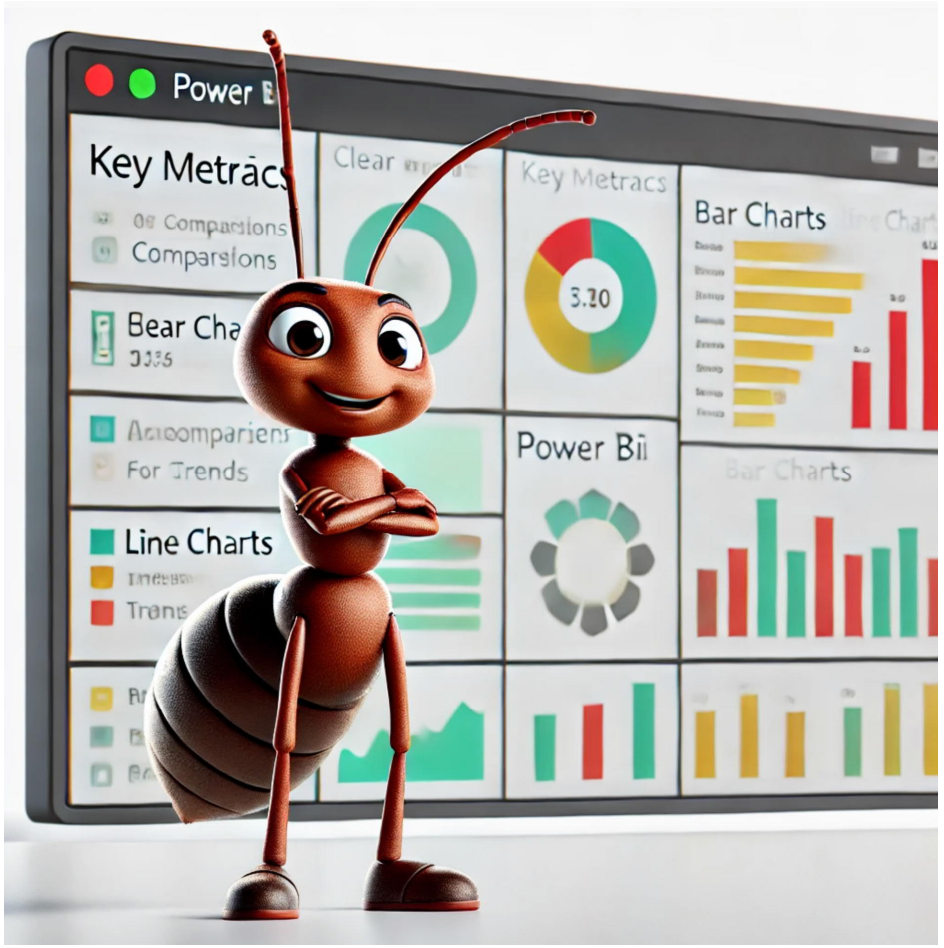
A picture is worth a thousand words. When designed properly:

- Users don’t need to ask for clarifications, the report speaks for itself.
- Fewer revisions & fixes are needed because the dashboard is user-friendly from the start.
- Time training & answering questions is reduced.
- A well-structured flow guides users from problem to insight to action by itself.

Creating Visuals in Power BI Live Demo

Extra-Credit

Dynamic Dashboard Design Principles



Dynamic Dashboard Design Principles

1. A Vision & A Need: Understand the End-User & Business Goals

Before you start designing, identify your audience (executives, sales team, your own credit department needs, etc.) and their needs. Then ask:

- What business questions should the dashboard answer?
  - Is this an overall good customer or a bad customer?
  - How much of our open AR Portfolio is high risk customers?
- What KPIs and metrics are most relevant?
  - DSO
  - Sales Trend
- How frequently will they use it?

Example: A Credit Manager needs a real-time detailed aging report, while an executive may only need a monthly high-level monthly summarized overview of significant balances. Begin to Plan

Dashboard Design Requirements Questionnaire

– Perceptual Edge Stephen Few

1. How often should the data be updated in the dashboard?

2. Who will use the dashboard? Is it for a single person, a single group, or people in several different departments?

3. What will they use the dashboard to do? What questions will they use it to answer? What actions will they take in response to these answers? (Actionable Insights!)

4. What specific information should be displayed on the dashboard? List all of the data items that should be included on the dashboard. Also indicate the level of summary/detail at which each item should be expressed on the dashboard.

Dashboard Design Requirements Questionnaire

– Perceptual Edge Stephen Few

5. Which of the data items listed above are the key (i.e., most important) items needed to meet the objectives supported by the dashboard?

6. What are the logical groupings that could be used to organize these data items on the dashboard? Into which of these groups does each data item belong?

7. What are the useful comparisons that will allow the dashboard's users to see the data items listed above in context? For instance, if one of the measures that your dashboard displays is revenue, do you have targets or historical data that could also be displayed to make current revenue more meaningful?

8. For each of these data items, what would constitute an exception? Are there specific thresholds that represent exceptionally high or low values or will users simply be looking for values that represent statistical outliers (meaning they're abnormally high or low)?

Dynamic Dashboard Design Principles

2. Keep the Layout Intuitive & Prioritize Key Metrics

Space is a special limited commodity. Use it wisely.

•Follow a logical structure: Place important insights at the top, detailed breakdowns below.

•Use the F-pattern or Z-pattern for readability.

•Apply consistent spacing, fonts, and alignment to avoid clutter. Use Grouping

Example: In a credit risk dashboard, put your total outstanding AR & DSO at the top and granular details (aging buckets, dispute breakdowns) at the bottom.

More design layout tips at: https://telefonicatech.uk/blog/design-tips-to-level-up-your-power-bi-dashboard/


1
facebook
Email or Phone
Password
Log In
Forgotten account?
2
Facebook helps you connect and share with the people in your life.
3
Create an account
It's free and always will be.
First name
Surname
Mobile number or email address
New password
Birthday
16
Jun
1999
Why do I need to provide my date of birth?
Female
Male
By clicking Create an account, you agree to our Terms and confirm that you have read our Data Policy, including our Cookie Use Policy. You may receive SMS message notifications from Facebook and can opt out at any time.
Create an account
4
Create a Page for a celebrity, band or business.

Dynamic Dashboard Design Principles

3. Use the Right Visuals for the Right Data

Different visuals serve different purposes:

- •Cards/KPIs: Highlight single values (e.g., Total Receivables, YTD, Key Metric %).
- •Bar/Column Charts: Best for comparisons of categories (e.g., Aging buckets).
- •Line Charts: Best for trends over time (e.g., Monthly DSO trend, Sales Trend).
- •Tables/Matrix: For detailed, drill-down data (Invoice-level details, Collection Notes)
- •Heatmaps/Tree Maps: Great for identifying outliers & trends.

Avoid overuse of pie charts, use them only when comparing a few categories.

SQLBI Free Power BI Visual Reference Guide:
https://www.sqlbi.com/ref/power-bi-visuals-reference/

Dynamic Dashboard Design Principles

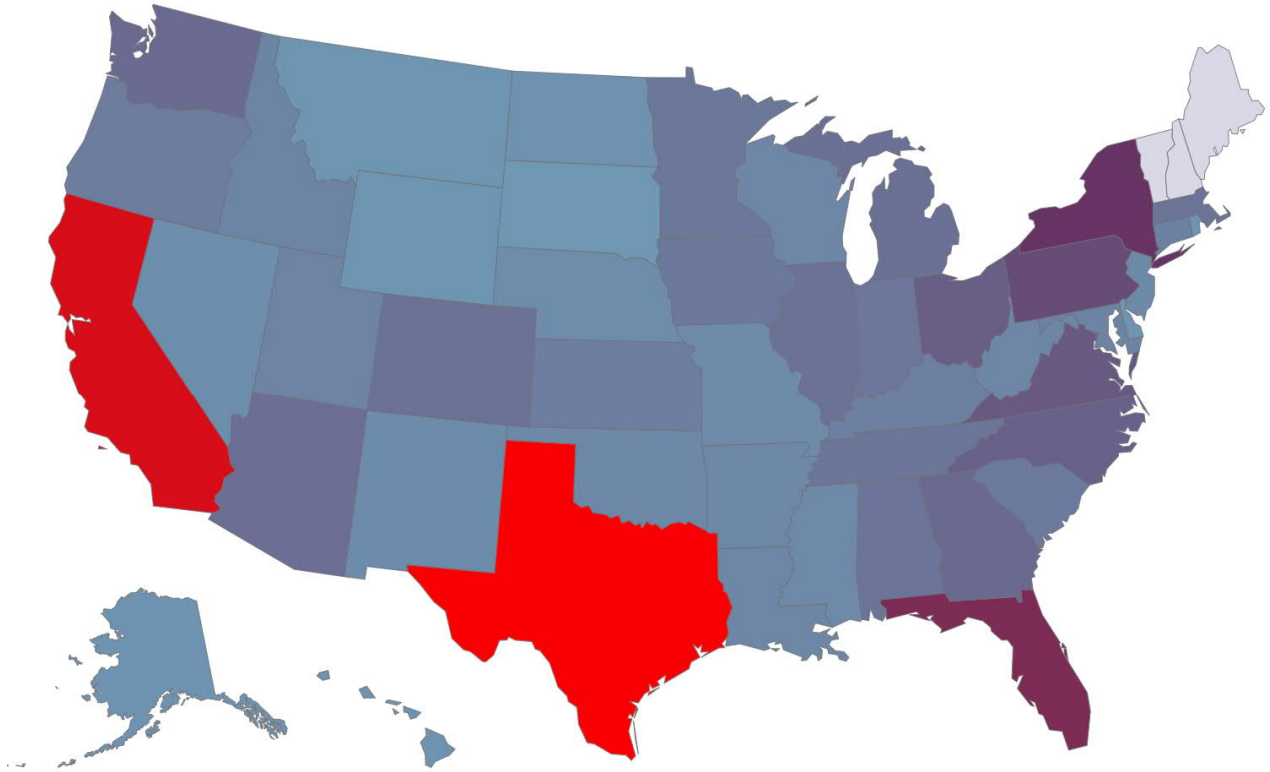
4. Maintain Consistent & Professional Design

A clean design improves readability and looks professional:

- Stick to a color theme (2-3 primary colors). Use your corporate colors!
- Use contrast and analogy wisely (e.g., don't use red/green if users are colorblind).
- Consistent font sizes (Avoid too many different text styles).
- Label charts clearly—don't rely only on legends. Add your own titles.

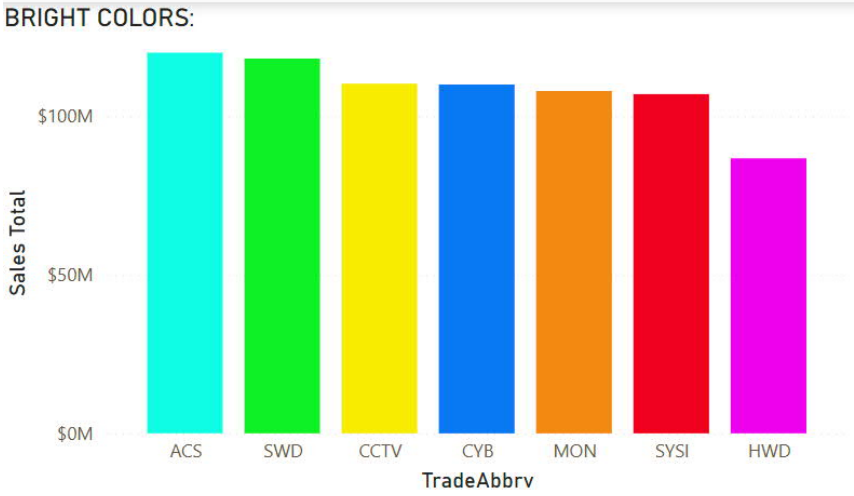
Example: Use blue, green for positive values, red for risks in an AR risk analysis report. Consider the meaning that users associate with specific colors.

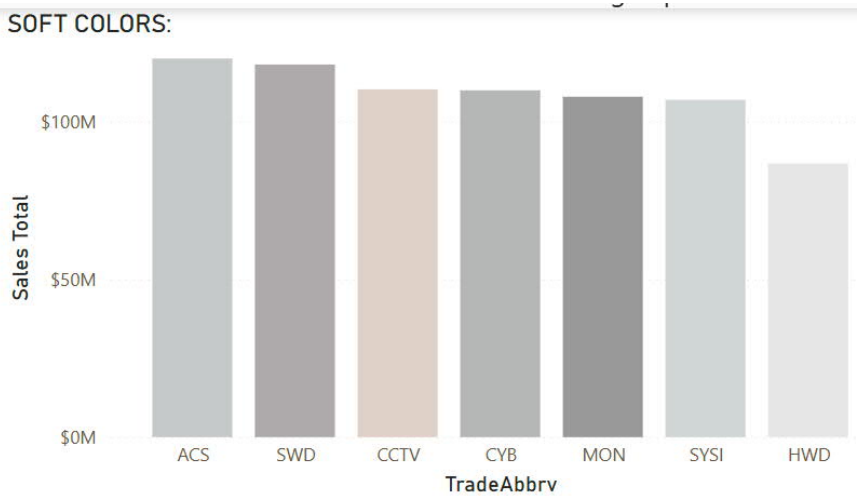
Color design is guided by contrast and analogy. Contrasting colors differ sharply, while analogous colors share similarities. Contrast grabs attention, whereas analogy creates unity. The red states immediately stand out against the similar blue-green ones, drawing the eye first.



Avoid Intense Colors

Use soft colors or analogous colors instead

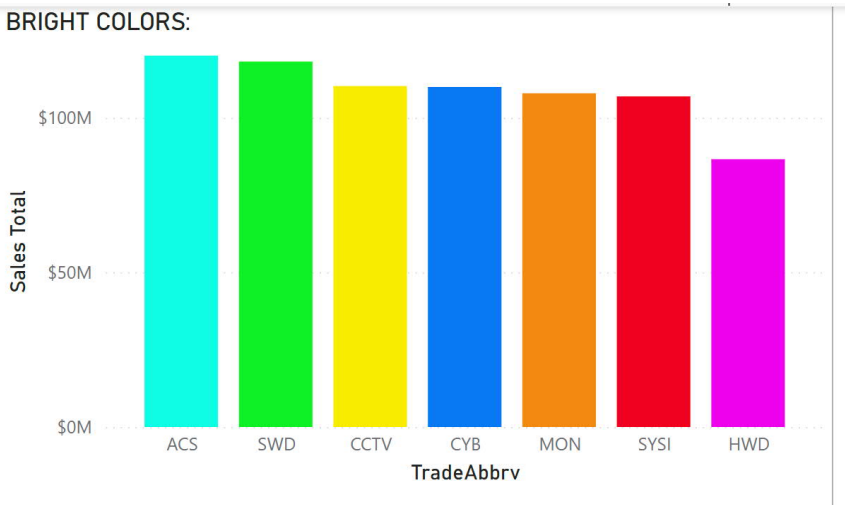




Second sample uses different hues for each category, you can make them more distinctive, or coordinate your palette with your corporate logo and colors.

Use Same Color When No Difference in Meaning Exists

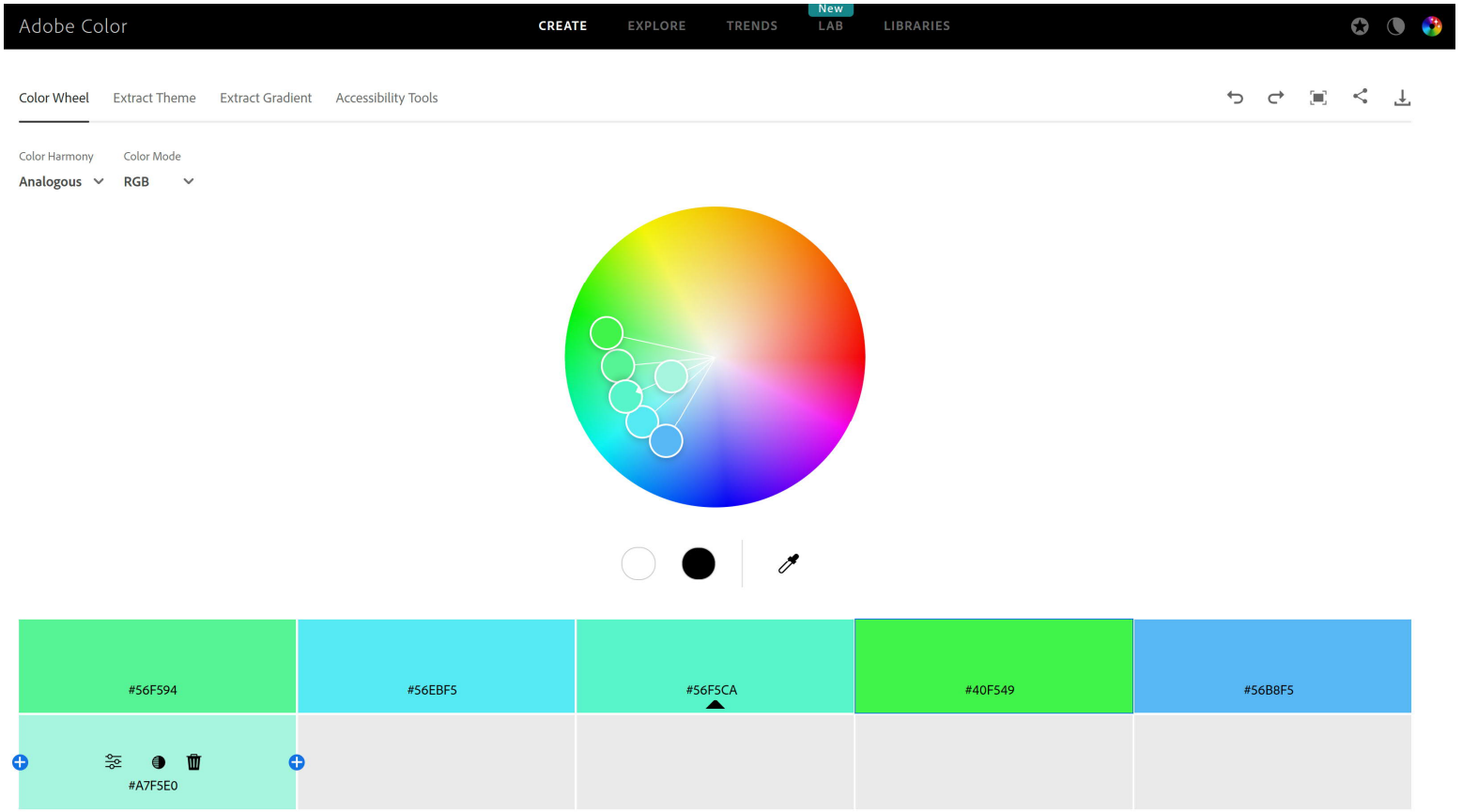
- Differences in color should communicate differences in meaning. If there is no meaning, remove the distraction.



Use a Single Hue to Distinguish Categories

- Another option is to use with variations in brightness and intensity. Select a range or a single hue for blue shades, arranging them from lightest to darkest. This approach can represent a sequence over time or distinguish regions in a way that maintains clarity without drawing too much attention.

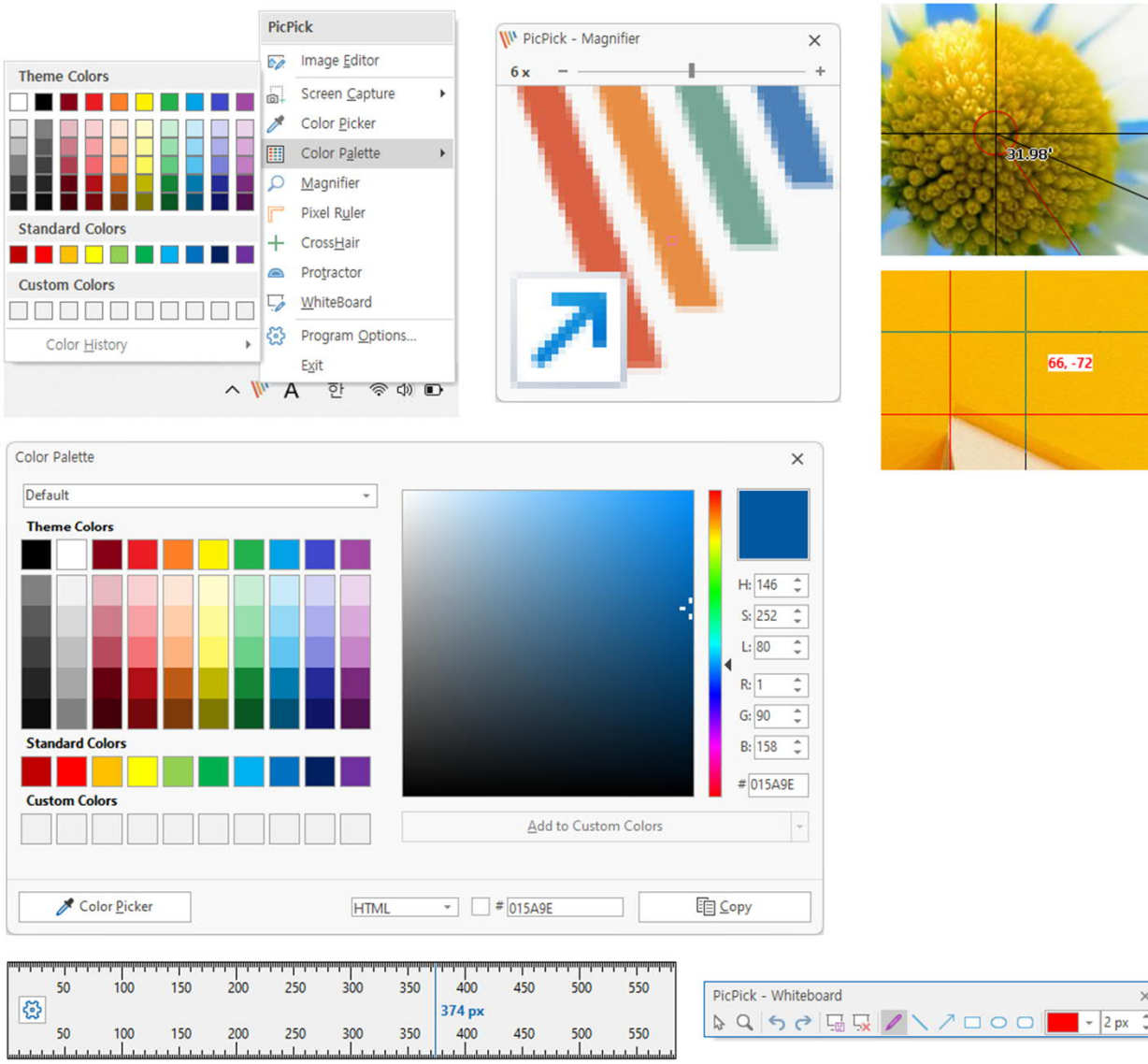
Analogous Colors Tool: Adobe Color



https://color.adobe.com/create/color-wheel

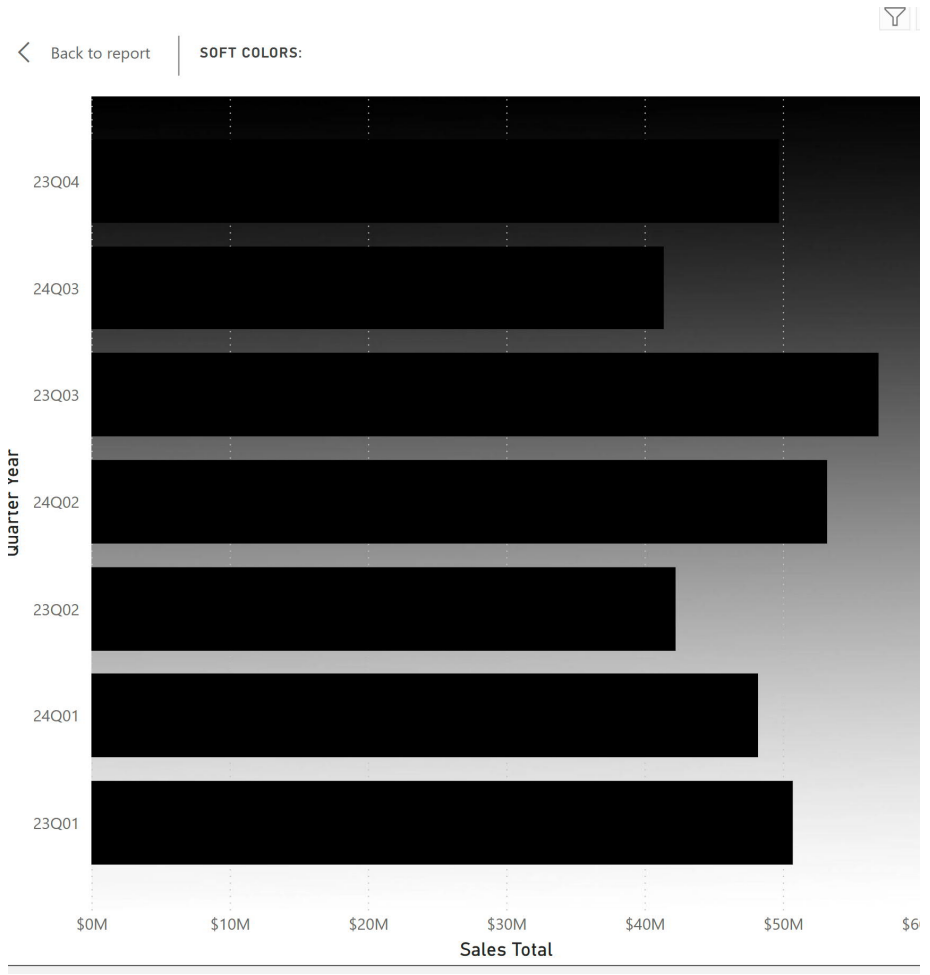
Another Color Tool: PickPick App

https://picpick.app

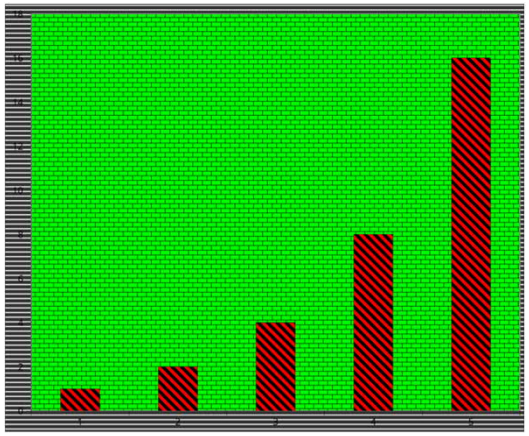


Use a Single, Neutral Background Color

The plot area of a graph should have a uniform background color. Using gradients or multiple colors can create visual inconsistencies, making identical elements appear different depending on their placement.



Avoid Chartjunk



“The interior decoration of graphics generates a lot of ink that does not tell the viewer anything new. The purpose of decoration varies—to make the graphic appear more scientific and precise, to enliven the display, to give the designer an opportunity to exercise artistic skills. Regardless of its cause, it is all non-data-ink or redundant data-ink, and it is often chartjunk.”

– Edward Tufte, The Visual Display of Quantitative Information, 1983

Chartjunk consists of all visual elements in charts and graphs that are not necessary to comprehend the information represented on the graph, or that distract the viewer from this information

- Embellishments
- Unnecessary Ornamentation
- Excessive Annotation
- Decoration
- Heavy or Dark Grid Lines
- Unnecessary Text
- Gimmicky Font Faces
- Ornamented Chart Axes
- Ornamental Shading
- Unnecessary Dimensions
- Distracting Display Frames
- Unnecessary Pictures, Backgrounds or Icons

Remember Hick's Law = Slow Decisions

Hick's Law, also known as the Hick-Hyman Law, states that the time it takes for a person to make a decision increases logarithmically as the number of choices available increases. It has a mathematical expression:

RT=a+blog2(n) Where:

- RT = Reaction time (time to make a decision)
- a = Baseline reaction time (a constant)
- b = A constant reflecting the cognitive processing time per choice
- n = Number of choices

In a Nutshell:

- User Experience (UX) & Interface Design: Reducing choices can improve usability and response time.
- Marketing & Sales: Too many product choices can lead to decision fatigue and lower conversions.
- Cognitive Psychology & Behavioral Science: Understanding choice overload and how people make decisions.

Applying Hick's Law for Faster Decisions

Power BI Application = Less is More:

- Reduce Filter Overload
- Group Related Metrics
- Use Default Views (Last 30 Days) & Smart Defaults with Most Relevant Data
- Use Drill-Throughs Instead of Extra Charts
- Limit Visual Overload

	Before Applying Hick's Law	After Applying Hick's Law
Filters	20+ dropdowns for date, amount, region, customer type, etc.	3 key filters: Date Range, Risk Level, Customer Type
Dashboard Layout	One cluttered page with all metrics	Tabs separating key areas
Data View	All customer details shown immediately	Drill-through for detailed views
Charts	10-15 visuals on one page	3-5 key charts with dynamic interactions

Whitespaces Work

Whitespace, or negative space, refers to the unmarked areas between elements in a design.

How Whitespaces Work:

1. Improved Legibility & Comprehension

In Power BI dashboards, effective use of whitespace improves readability by preventing clutter and allowing users to focus on individual data points. This deliberate spacing can lead to better comprehension and retention of information

2. Establishes Visual Hierarchy

By separating sections and grouping related items, whitespace creates a clear visual hierarchy, making the dashboard more intuitive and user-friendly.

Strategic use of whitespace helps in organizing dashboard elements, guiding users' attention to the most critical information first.

3. Increased Attention

A dashboard with adequate whitespace appears clean and professional, enhancing its aesthetic appeal.

This not only makes the dashboard more visually pleasing but also encourages user engagement, as a well-structured layout facilitates easier navigation and interaction.

Whitespaces Work

4. Facilitates Focus and Reduces Cognitive Load

They prevent overwhelming the user with too much data at once, enabling them to focus on specific insights without distraction

5. Enhances Interaction Rates

Clear spacing around interactive elements like filters and buttons makes them more noticeable and accessible, encouraging users to engage more deeply with the data.

6. Conveys Brand Tone and Quality

Communicates elegance, simplicity, and sophistication. A thoughtfully designed dashboard with appropriate whitespace aligns with the brand's identity and enhances the overall user experience

Avoid Pie Charts

Pie charts are good for showing relationships between parts or percentages of a whole. But if there are too many pieces of pie or too many sizes, they can be ineffective for comparing proportions. Bar charts or column charts are more effective. Because of this pie Charts have a bad rep with most Visual Designers for the following reasons:

1. Difficulty in Comparing Similar Sizes

Human perception struggles to accurately compare angles and areas, especially when pie slices are close in size. Unlike bar charts, where length differences are clear, pie charts make it hard to distinguish which slice is larger unless there is a significant gap.

2. Lack of Precision

Pie charts do not allow for precise value comparisons. While a bar chart provides a clear numerical axis for reference, a pie chart forces the viewer to estimate proportions, which can lead to misinterpretation of data.

3. Limited Data Representation

Pie charts are only effective for showing a small number of categories (typically 3–5 at most). If there are too many slices, the chart becomes cluttered and unreadable. This limitation makes them unsuitable for datasets with multiple categories. The labels do not line up and clutter occurs.

4. Difficulty Comparing Across Multiple Charts

If you need to compare multiple pie charts (e.g., year-over-year data), it is difficult to track changes between slices. Bar charts or line charts are much better suited for time-series or categorical comparisons since they provide a clearer, linear representation of differences.

5. Ordering Issues

Unlike bar charts, where categories can be sorted in descending or ascending order, pie charts force an arbitrary arrangement of slices, making it harder to follow trends or patterns in the data

To learn more...
BOOK RESOURCE

***Show Me the Numbers: Designing Tables and Graphs to Enlighten* Second Edition by Stephen Few**

Available on Amazon

"Most presentations of quantitative information are poorly designed—painfully so, often to the point of misinformation. This problem, however, is rarely noticed and even more rarely addressed. We use tables and graphs to communicate quantitative information: the critical numbers that measure the health, identify the opportunities, and forecast the future of our organizations. Even the best information is useless, however, if its story is poorly told. This problem exists because almost no one has ever been trained to design tables and graphs for effective and efficient communication. *Show Me the Numbers: Designing Tables and Graphs to Enlighten* is the most accessible, practical, and comprehensive guide to table and graph design available"

Dynamic Dashboard Design Principles

5. Implement Interactive Features Thoughtfully

Interactivity should enhance, not clutter:

- •Slicers & Filters: Allow users to drill down on regions, time periods, categories.
- •Drill-through pages: Provide detailed insights when clicking a KPI.
- •Bookmarks & Buttons: Create a guided experience (e.g., toggle between charts & tables).
- •Tooltip Pages: Show extra details on hover (e.g., customer payment history).

Example: Instead of a separate report page for each region, let users drill through dynamically.

AR Portfolio Summary

SafeNetrix

SafeZone Installations

AR Balance:

$49.78M

Salesperson Name

All

Region

- [ ] Midwest Region
- [ ] Northeast Region

City

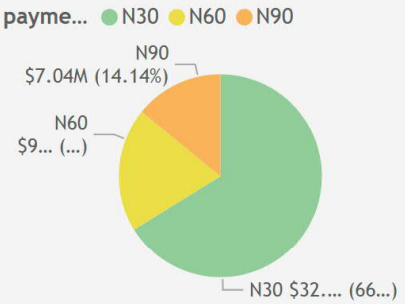
- [ ] Chicago
- [ ] Peoria
- [ ] Scranton
- [ ] Springfield

Trade Description

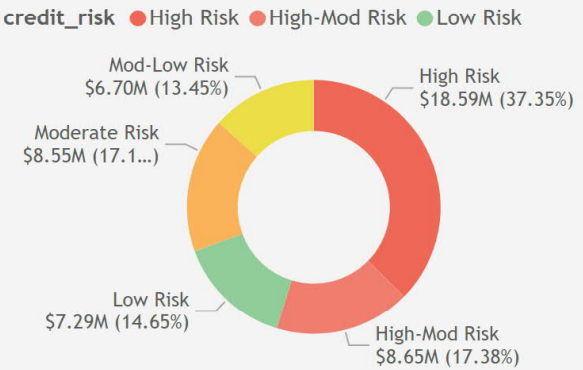
- [ ] Access Control Systems
- [ ] Closed-Circuit Television
- [ ] Cybersecurity
- [ ] HWD Development
- [ ] Monitoring Services
- [ ] Software Development
- [ ] Systems Integation

AR Aging Bands	Inv Balance	% AR	Doc#	Customers#
00 DBT	$4,021,870.00	8.08%	16	16
01-30 DBT	$18,377,108.74	36.92%	36	33
30-60 DBT	$14,718,884.52	29.57%	33	32
60-90 DBT	$4,638,880.00	9.32%	18	18
90+ DBT	$8,023,955.50	16.12%	28	27
Total	**$49,780,698.76**	**100.00%**	**131**	**106**

Payment Terms Open Balance



Credit Risk Open Balance



Top 10 Open Balances

Company_Name	Inv Balance
Daugherty Inc	$1,428,927.00
Hand, Bruen and Fay	$1,098,416.00
Jerde-Flatley	$1,198,260.00
Mertz LLC	$1,245,308.00
Nienow, Kuhlman and Haley	$1,316,730.21
Nolan-McClure	$1,407,229.00
Rau, Armstrong and Grant	$4,561,277.82
Trantow-Kris	$1,423,762.00
Willms Group	$1,130,830.00
Wiza-Greenfelder	$1,105,519.00
Total	**$15,916,259.03**

Top 10 Past Due Balances

Company_Name	Past Due ALL*	#Docs
Rau, Armstrong and Grant	$4,561,277.82	2
Daugherty Inc	$1,428,927.00	3
Trantow-Kris	$1,423,762.00	2
Nolan-McClure	$1,407,229.00	2
Nienow, Kuhlman and Haley	$1,316,730.21	1
Mertz LLC	$1,245,308.00	2
Jerde-Flatley	$1,198,260.00	3
Willms Group	$1,130,830.00	2
Wiza-Greenfelder	$1,105,519.00	2
Hand, Bruen and Fay	$1,098,416.00	2
Total	**$15,916,259.03**	**21**

180+ Bad Debt WO Risk

Company_Name	120+ DBT*	#Docs	DBTAge
Wehner, Sanford and Durgan	$488,791.00	1	173
Nolan-McClure	$477,848.00	1	233
Trantow-Kris	$428,037.00	1	162
Willms Group	$407,142.00	1	204
Hagenes-Kerluke	$361,705.00	1	170
McCullough-Reynolds	$342,737.00	1	206
Mertz LLC	$332,564.00	1	152
Hansen-McGlynn	$327,898.00	1	180
Jerde-Flatley	$291,898.00	1	206
Simonis-Cartwright	$239,894.00	1	163
Total	**$3,698,514.00**	**10**	

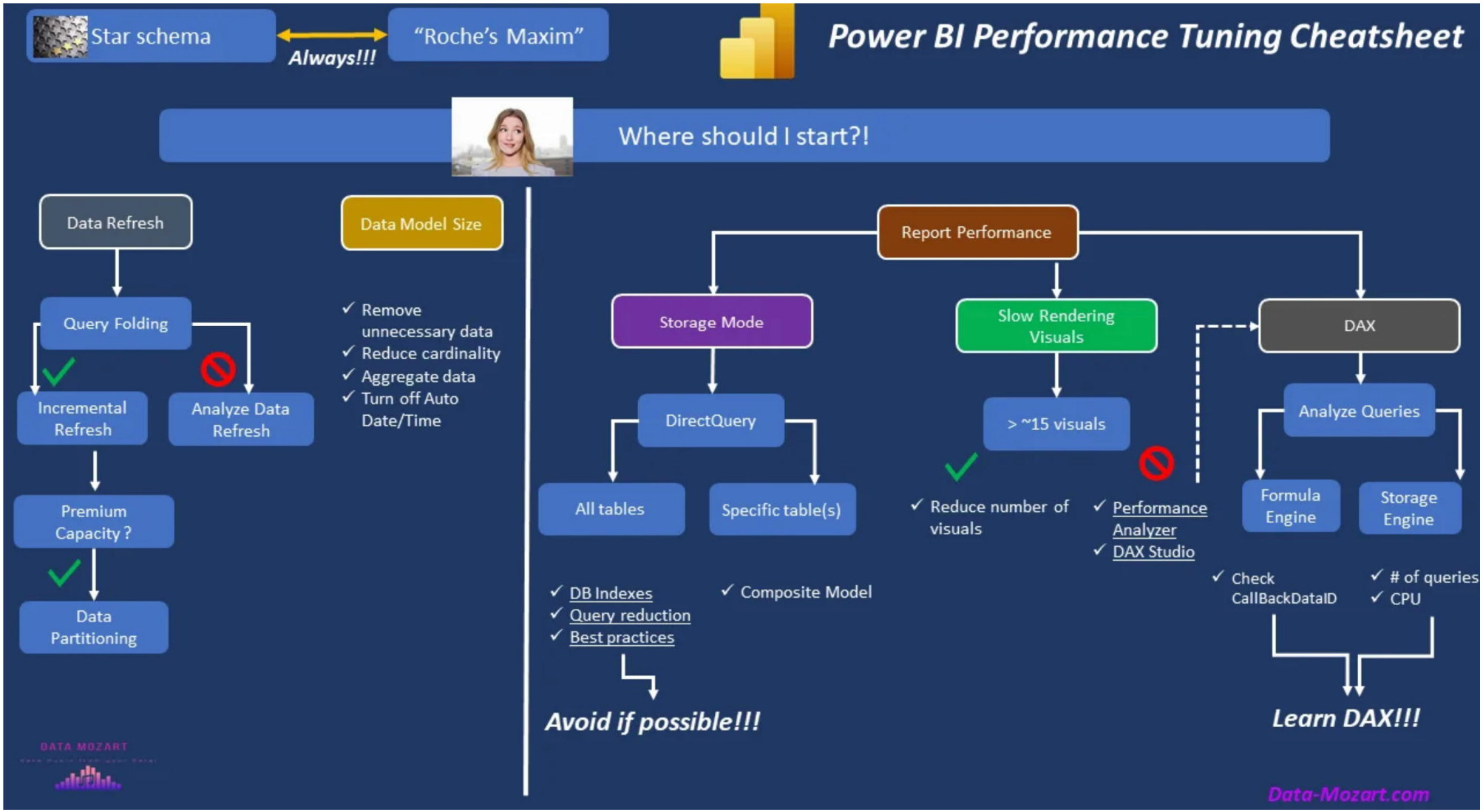
Dynamic Dashboard Design Principles

6. Ensure Performance Optimization

A slow report will frustrate users. To optimize:

- Use Aggregations: Avoid large row-level data; pre-aggregate in SQL/Power Query/DAX.
- Reduce visuals per page: Each visual adds a query load.
- Limit slicers: Too many filters slow down performance.
- Use star schema: Avoid direct table joins; use dimensional modeling.
- Optimize DAX calculations: Avoid iterators like SUMX on large datasets.

https://data-mozart.com/power-bi-performance-tuning-cheatsheet/



Dynamic Dashboard Design Principles

7. Ensure Data Accuracy & Transparency

Incorrect data erodes trust. To ensure accuracy:

- Always include data refresh date.
- Show calculation logic (e.g., "DSO = (Total AR / Average Sales) * 30").
- Use data validation rules to catch anomalies. (Year mistypes, invoice type with a negative value)
- If using external sources, flag potential data lags if refresh is at different intervals.

Example: In a credit risk dashboard, include a tooltip explaining risk calculation methodology or how DSO is calculated.

Dynamic Dashboard Design Principles

8. Design for Mobile Compatibility

Executives, Sales Teams, Field Techs may view reports on mobile devices. Optimize by:

- Using mobile layouts in Power BI's Mobile View.
- Keeping key insights on the first screen (avoid scrolling too much).
- Using fewer columns in tables for readability.

Example: Show only high-level KPIs (e.g., Top 10 customers by AR) instead of complex breakdowns on mobile.

Dynamic Dashboard Design Principles

9. Use Row-Level Security (RLS) for Data Privacy & Relevance

For dashboards with sensitive data or relevant data by region:

- Apply Row-Level Security (RLS) so users only see relevant data.
- Ensure role-based access control (e.g., regional managers see only their region).
- If sharing reports externally, use Power BI Apps & Workspaces with permissions.

Example: A regional credit analyst or sales rep should only see customers from their assigned region, not all customers or an AR Portfolio only shows corresponding region to user.

Dynamic Dashboard Design Principles

10. Educate Users & Provide Documentation

Even a well-designed dashboard is useless if users don’t know how to interpret it.

- Add a "How to Use" page explaining filters, visuals, and key calculations, FAQ.
- Provide definitions for business terms (e.g., What does "Bad Debt Ratio" mean?).
- Offer short training videos or documentation.
- Create a data dictionary.

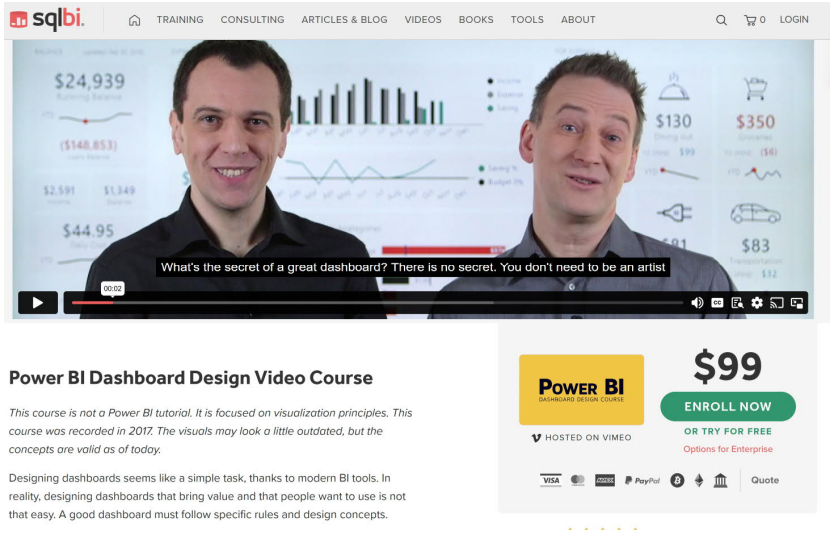
Example: A tooltip explaining "What does a high DSO mean?" helps users take action

Dynamic DAX Data Dictionary

See Text Code:

```
Data Dictionary =

VAR _columns = SELECTCOLUMNS(
   FILTER(
      INFO.VIEW.COLUMNS()
      , [Table] <> "Data Dictionary" && NOT ([IsHidden])
   )
   , "Type", "Column"
   , "Name", [Name]
   , "Description", [Description]
   , "Location", [Table]
   , "Expression", [Expression]
   )

VAR _measures = SELECTCOLUMNS(
   FILTER(
      INFO.VIEW.MEASURES()
      , [Table] <> "Data Dictionary" && NOT ([IsHidden])
   )
   , "Type", "Measure"
   , "Name", [Name]
   , "Description", [Description]
   , "Location", [Table]
   , "Expression", [Expression]
   )

VAR _tables = SELECTCOLUMNS(
   FILTER(
      INFO.VIEW.TABLES()
      , [Name] <> "Data Dictionary" && [Name] <> “Calculations" && NOT ([IsHidden])
   )
   , "Type", "Table"
   , "Name", [Name]
   , "Description", [Description]
   , "Location", BLANK()
   , "Expression", [Expression]
   )

VAR _relationships = SELECTCOLUMNS(
        INFO.VIEW.RELATIONSHIPS()
   , "Type", "Relationship"
   , "Name", [Relationship]
   , "Description", BLANK()
   , "Location", BLANK()
   , "Expression", [Relationship]
   )

   RETURN

   UNION(_columns, _measures, _tables, _relationships)
```

sqlbi



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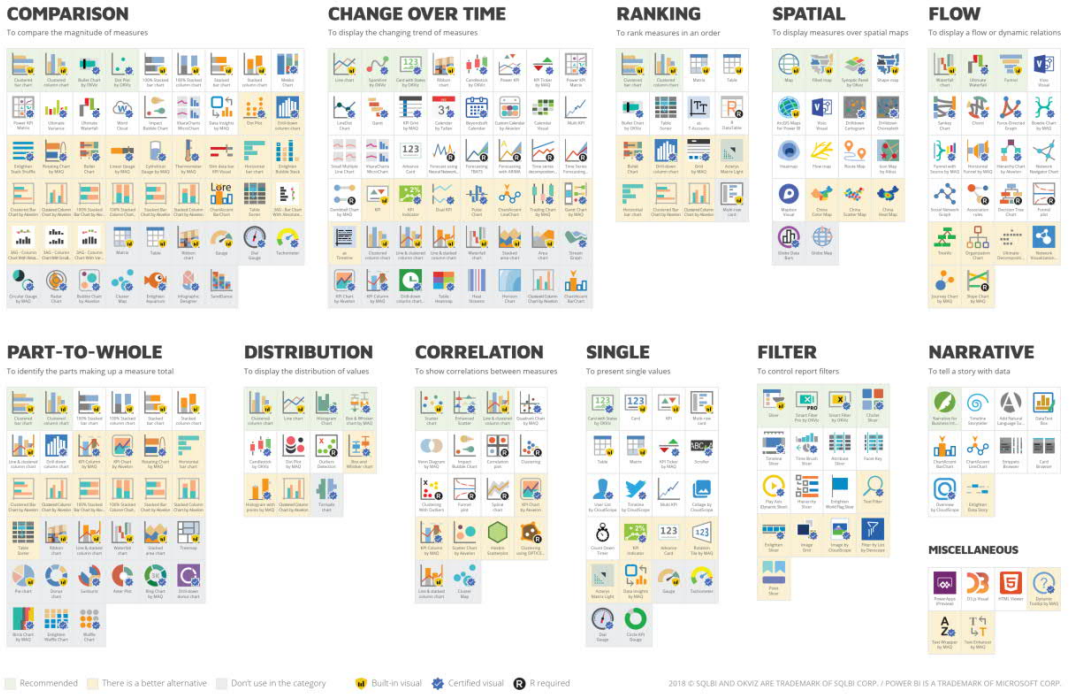

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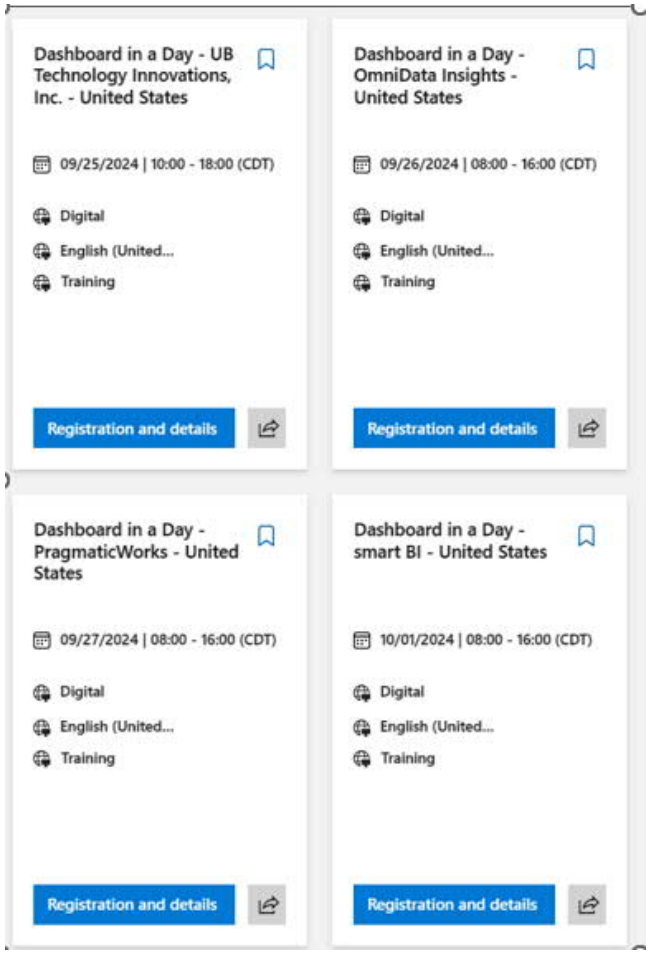

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Prerequisites

None

This module is part of these learning paths

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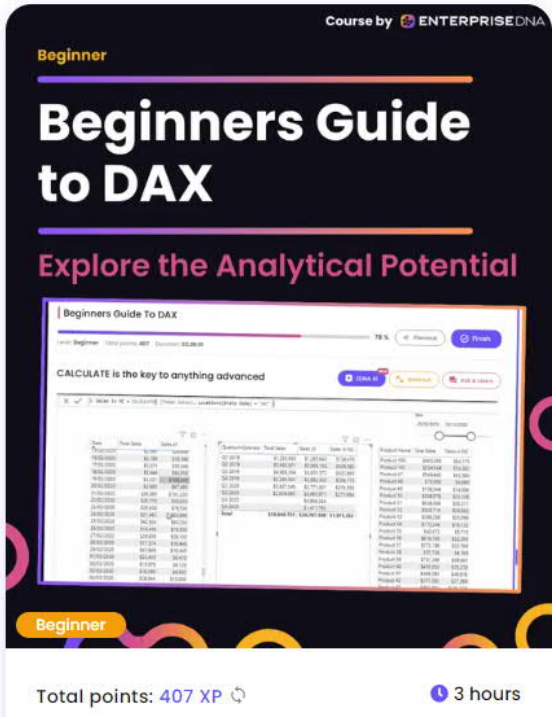

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