

Tableau 101: Dashboards

Pro-tips on How & When to Build a Dashboard

What is a Dashboard?

- A dashboard is a collection of several views, allowing you to compare a variety of data simultaneously. A dashboard gives you a consolidated display of many worksheets and related information in a single place.
- Reasons for creating a dashboard;
 - ◆ To compare and monitor a variety of data at once
 - ◆ To view multiple sheets in one place
 - ◆ To view visual graphs, charts, or geographic maps along with data charts in one place

Dashboard Definitions

- ★ **Objects** - dashboard options that add visual appeal and interactivity.
- ★ **Horizontal and Vertical** - objects provide layout containers that let you group related objects together and fine-tune how your dashboard resizes when users interact with them.
- ★ **Blank** - objects help you adjust spacing between dashboard items.
- ★ **Button** - navigation actions to seamlessly move between dashboards, sheets or stories.
- ★ **Extension** - objects let you add unique features to dashboards or integrate them with applications outside of Tableau
- ★ **Text** - objects can provide headers, explanations and other info.
- ★ **Image** - objects add to the visual flavor of a dashboard, and you can link them to specific target URLs.
- ★ **Web Page** - objects display target pages in the context of your dashboard.
- ★ **Tiled** - these items do not overlap; they become part of a single-layer grid that resizes based on the overall dashboard size.
- ★ **Floating** - these items can be layered over other objects.

Steps to Build a Basic Dashboard

After you have created one or more sheets, you can combine them in a dashboard, add interactivity and more.

1. Like worksheets you access dashboards from tabs at the bottom of a workbook. Click the “New dashboard” icon button at the bottom of the workbook to create a dashboard.
2. Next, update the size of your Dashboard by clicking the dropdown under “Size” to the left-hand side panel. Recommended size = Automatic
3. Then, click “Dashboard” along the top navigation row to reveal the dropdown. In the dropdown select, “ Show Title” to title the dashboard.
 - a. Name your dashboard by double clicking on the title section.
 - b. A secondary screen will pop up to name, size, and format your title.
4. From the ‘Sheets’ list on the left, drag views to your dashboard on the right.
5. If desired, utilize objects to layout/position your sheet visuals or data charts.
6. Customize your dashboard by formatting, adding imagery, text for callouts, and other interactive features.

Tips, Tricks and Rules to Building a Dashboard

- **Content is key** when it comes to building an effective dashboard. Only include the most important content.
 - ◆ Remove excessive clutter such as lines and excess text.
 - ◆ Use a consistent color scheme between graphs to make the dashboard quicker to understand.
 - ◆ Avoid using more than 4 graphs per dashboard.
- **Data in sheets and dashboards are connected**; when you modify a sheet, any dashboard containing it changes.
- While creating a dashboard you can add views from any worksheet in the workbook along with many supporting objects such as text areas, web pages and images.
- You can also assign a floating layout to an item by holding down Shift on your keyboard as you drag it onto the dashboard.
- **Top 10 Tableau Dashboard tips**
 - ◆ Resize your Dashboard
 - ◆ Use size and position to show hierarchy. Dashboards need hierarchy to be easy to scan.
 - ◆ Use Imagery
 - ◆ Minimize the Noise. Do not cram too much data into a dashboard
 - ◆ Customization and Interaction
 - ◆ Give your number context.
 - ◆ Group your related metrics.
 - ◆ Round your numbers
- Other resources: <https://help.tableau.com/current/pro/desktop/en-us/dashboards.htm>