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## Training Transcript: Designing for Instructional Clarity: Text and Tooltips

We've finished building a dashboard that helps us explore profits for our business called Superstore. As we created the dashboard, we tried to use good design principles. Did we succeed? Because the dashboard only shows me one view at the start, I might initially be confused. Are there instructions to help me along?

Clear titles tell me I'm seeing data for profits and sales by location – by state, it looks like. When I point to a mark, a tooltip gives me sales and profit information, and over here, I can filter the view by year and region. An instruction tells me: Populate the views below. I guess I do that by clicking a mark. That filters to another view. This looks like more detail about the mark I selected – for sales and profits in California, I suppose.

A tooltip tells me specifically about this sales data, and the legends help me interpret the colors and shapes. All good, but again, I'm having to guess a little about what to do. When I click a mark, I get more sales details about that segment and department. This is a nicely interactive dashboard with detailed, filtered views. What I'd like, though, are more thorough instructions to tell me how to use it and interpret its data.

Let's add instructions to the views. Looking at our single instruction, here, we should be more specific. I'll double-click the title to get the Edit Title dialog box, and to the existing text, "Populate the views below," I'll add, "by selecting a state or states," and click OK. Now we've said exactly what to do. Let's filter on California, and improve instructions in the Plot of Sales and Profits view.

In the editing dialog box, let's first add a dynamic field to give a context to the data we show here. A dynamic field is one that updates depending on the data. We can use one here to show the name of the state the data is filtered for. To insert an updating State field, we use arrow brackets. The field gets a gray highlight to show that it's dynamic. Let's also add these instructions, to help people use the view: "Hover for details. Select points to filter." To be consistent with the other instructional text, we'll reduce the font size to 10, and take off the bold formatting.

Now, it's clear that, in the scatter plot, I'm seeing sales details for the state I clicked in the map. Notice how the view title updates according to the selected state's name. And the instructions tell me how to see more detail on this data.

To make the data clear in the Profitability Details view, let's open the editing dialog, and explain that the data is, "Sorted by profit, lowest to highest." There, we've added instructions and information to help users interact with and understand the data, saving them from having to guess.

A place to check for clarity, helpfulness, and consistency in your design is the tooltip. Hovering on a mark in the map view, I see the tooltip here is pretty minimal. Let's compare the tooltip in the scatter plot. This one is explicit, thoroughly describing the data, using complete sentences, and including a profit ratio percentage -added information. All of this helps us interpret the data in a complex chart.

To see how this tooltip was put together, and what you might do with tooltips, let's take a quick look in the Edit Tooltip dialog box. With the view selected, I'll click, Worksheet, Tooltip. In the dialog box, I've got the same rich formatting options that I have for title text. To describe and add to the scatter plot data, we've used several dynamic fields, including calculated fields, that update depending on which data are selected.

And, there are other settings to help you control a tooltip's behavior and look. Looking again at the tooltip in the map view, let's make this one equally clear and friendly. These are totals for the state we're hovering on, so let's say that. With the view selected, I'll open the editing dialog box. At the top, I'll add the line, "Overall totals for <State>", including State as a dynamic field, so that it updates to reflect the current state. And I'll add a colon. Using the style of complete phrases, I'll include verbs here. And in front of the calculated field, showing if the state is profitable or not, I'll type in, "This state is. I'll remove the bold formatting for the static text. How does that look?

We've added context by including the state name, and we've continued the explicit style of our other tooltips. Context, clarity, consistency: We want all of these qualities throughout a dashboard, and that includes tooltips.