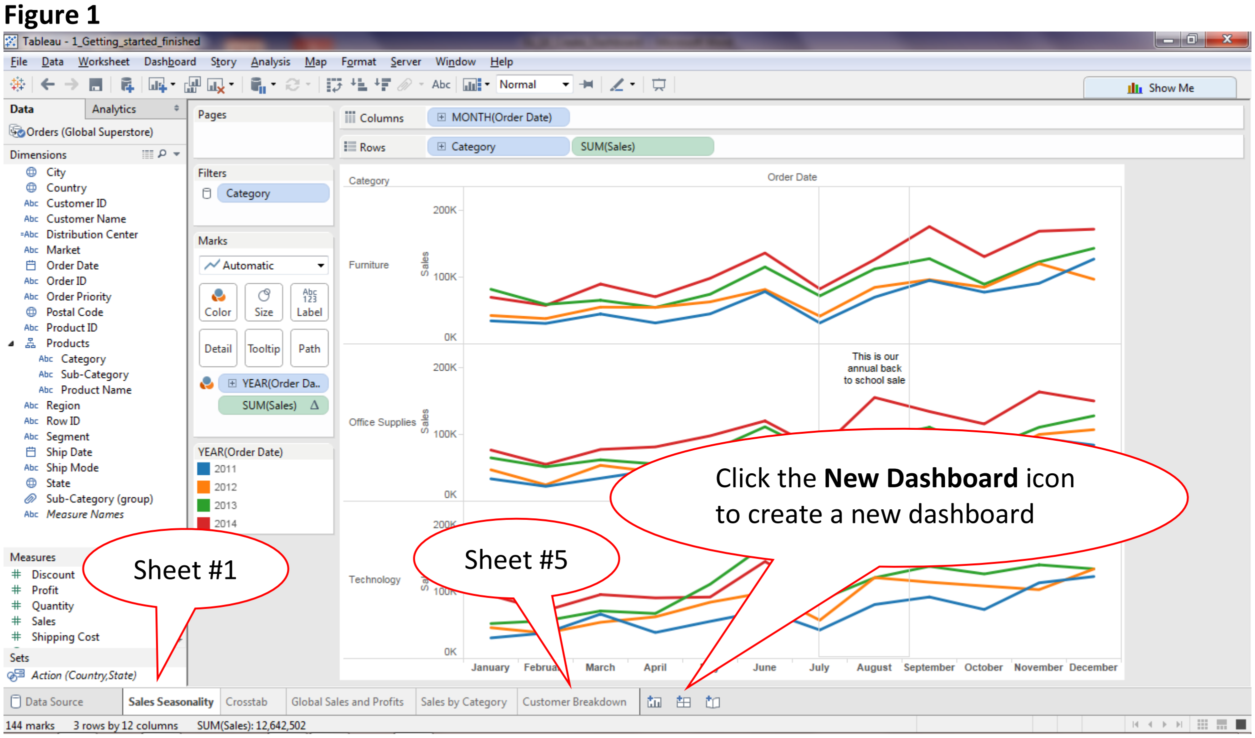
Objective: This exercise will demonstrate how to create a dashboard

Dashboards can be used to present one or more views so that a consolidated view can be provided. A view incorporated into a dashboard is just a window to the underlying worksheet. Dashboards tie different views together and are frequently provided with filters, legends, and interactivity. They can include worksheets, images, texts, as well as webpages. Stories are walkthroughs of one or more dashboards or sheets. While dashboards answer the question "What," stories answer the question "Why."

Figure 1 contains five sheets which can be incorporated into a dashboard. The sheets are:

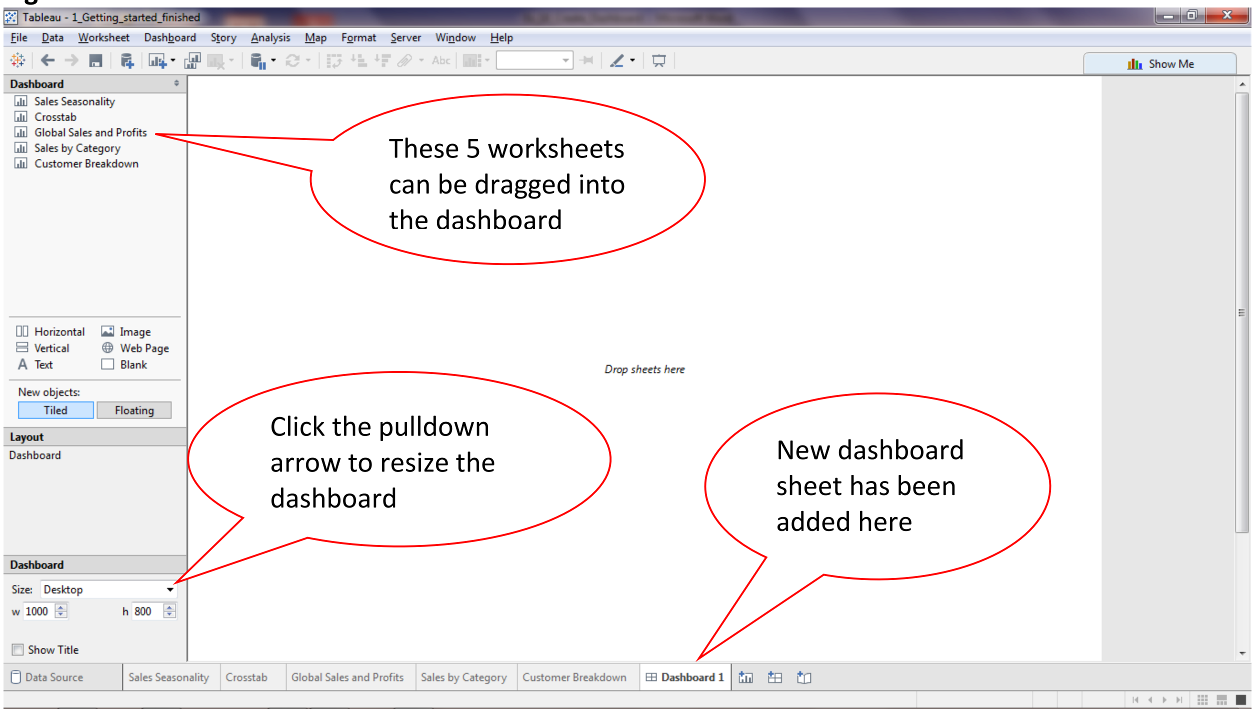
- Sales seasonality
- Crosstab
- Global Sales and Profits
- Sales by Category
- Customer Breakdown

Figure 1



- Click the **New Dashboard** icon as shown on Figure 1, which will lead to the display on Figure 2 where a new dashboard sheet (**Dashboard 1**) has been added

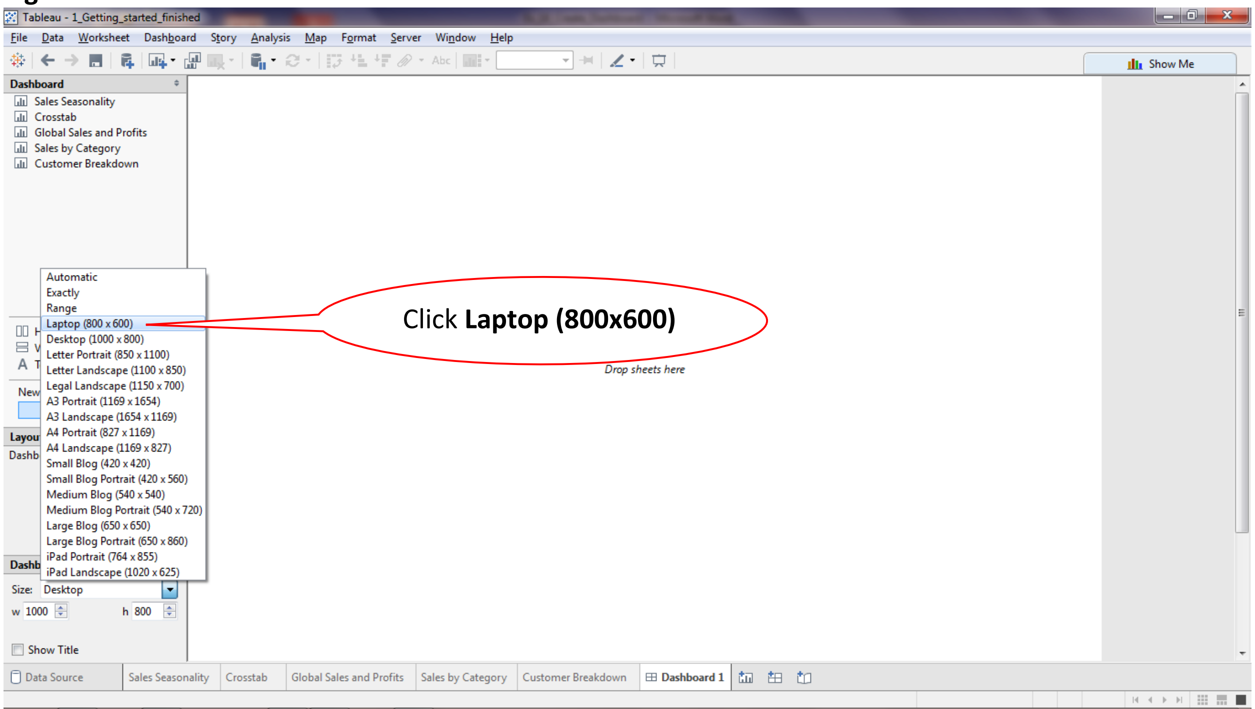
Figure 2



To resize the dashboard display:

- Click the **Dashboard** pulldown arrow as shown on Figure 2, which will popup the menu tree displayed on Figure 3

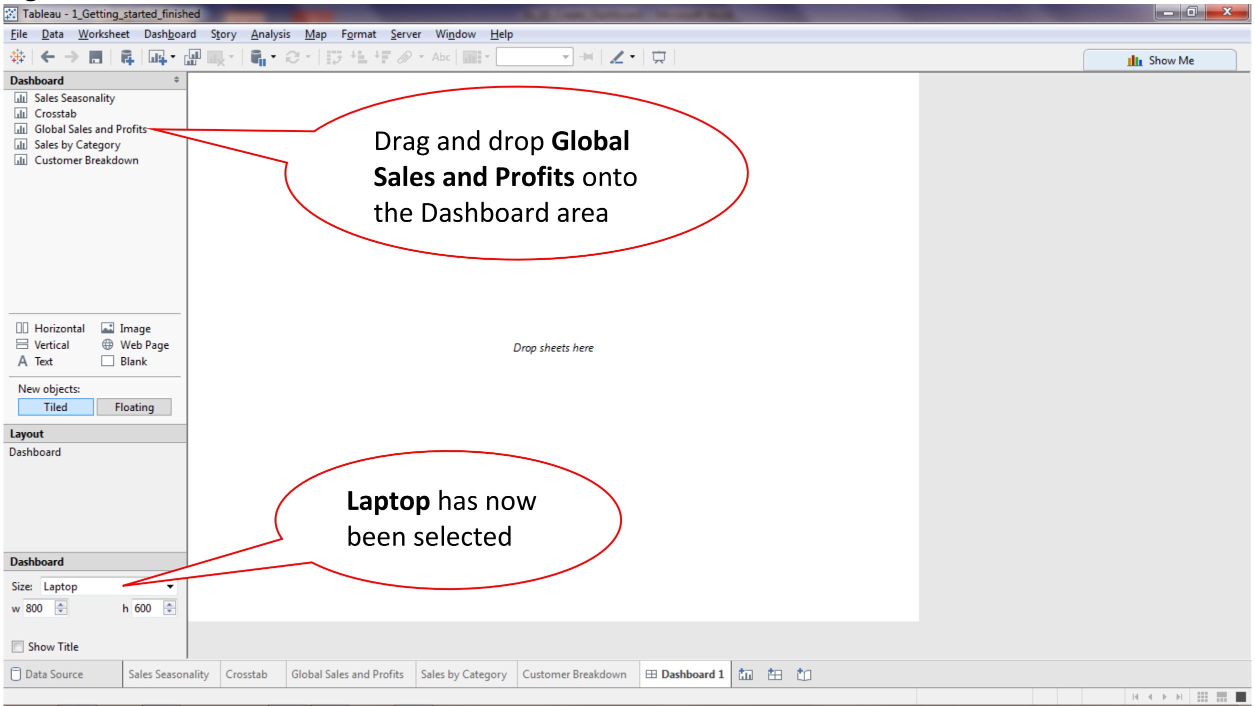
Figure 3



The size to be selected will depend on the device(s) to be used for viewing the dashboard, which can include devices as diverse as desktops, laptops, tablets, and smartphones.

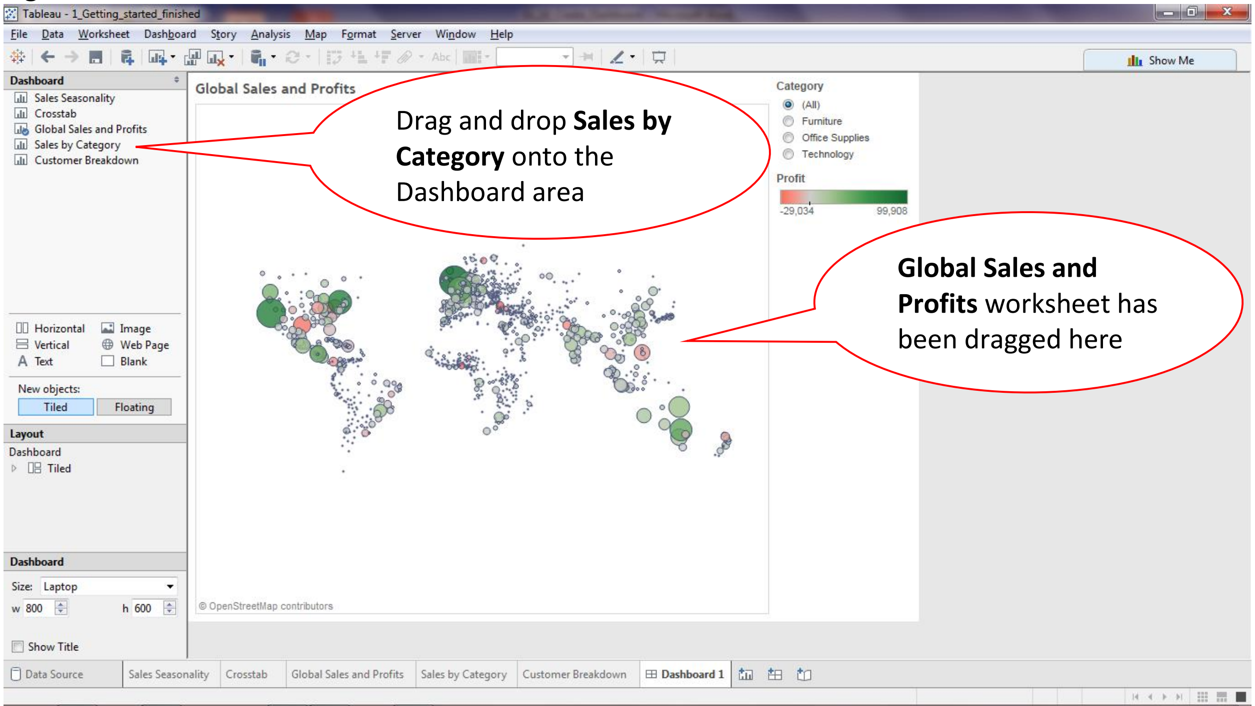
- Click **Laptop (800x600)** as shown on Figure 3, which will lead to the display on Figure 4

Figure 4



- Drag and drop the **Global Sales and Profits** worksheet onto the Dashboard as shown on Figure 4, which will lead to the display on Figure 5

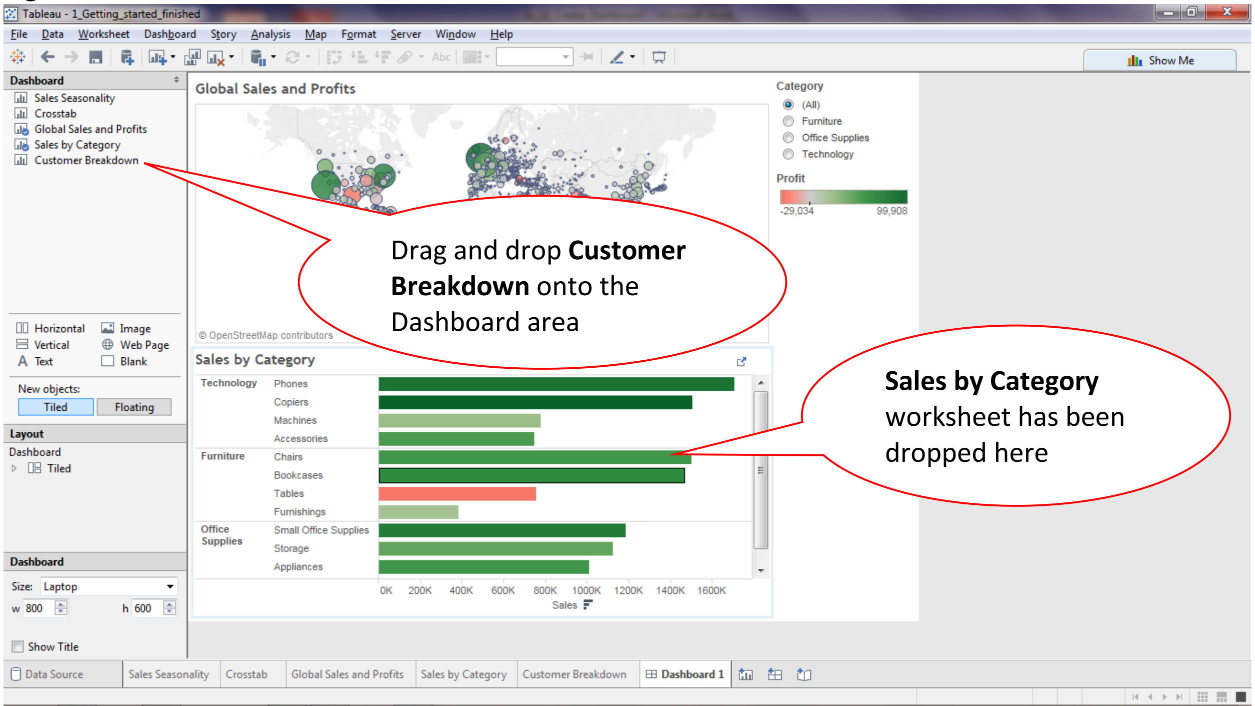
Figure 5



When the first view is brought into a dashboard, it automatically takes up the whole view. However, any subsequent worksheet can be placed in specific areas of the screen. If the mouse button is held down as it is moved around the dashboard, grey areas will indicate where the dragged view will be located when it is let go. If it is brought all the way down to the bottom of the screen, it will fill the entire width.

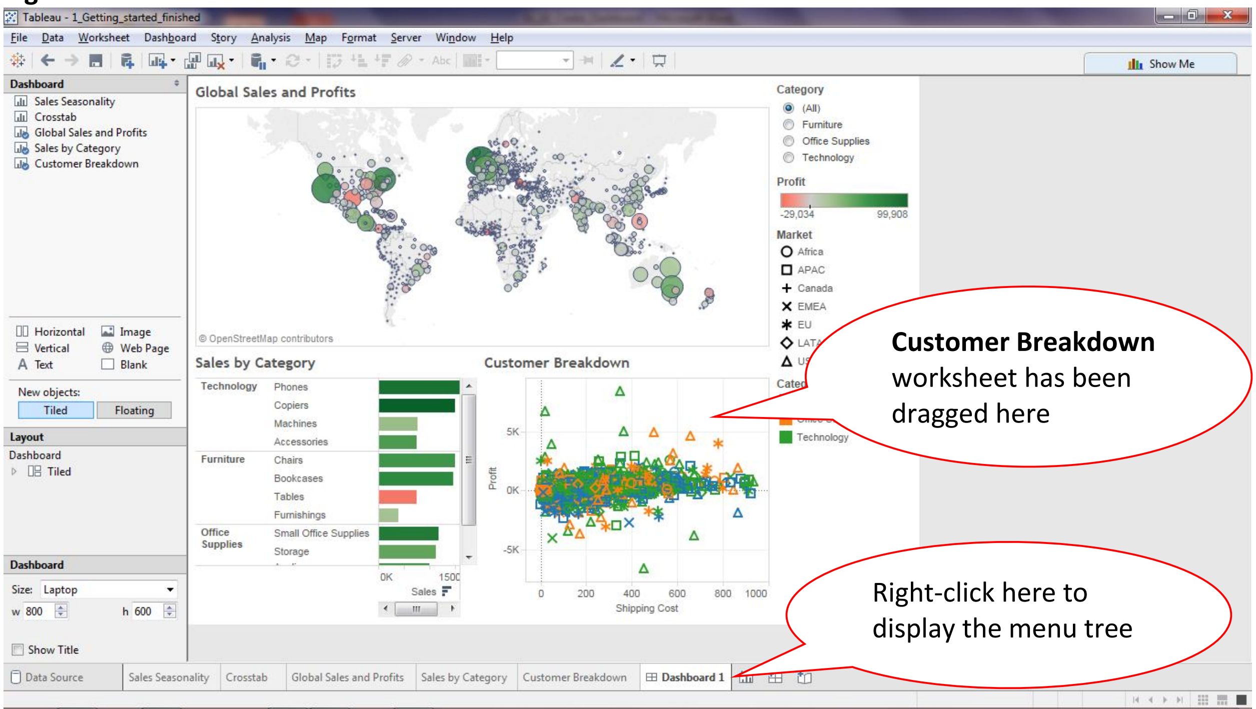
- Drag and drop the **Sales by Category** worksheet onto the Dashboard area as shown on Figure 5, which will lead to the display on Figure 6

Figure 6



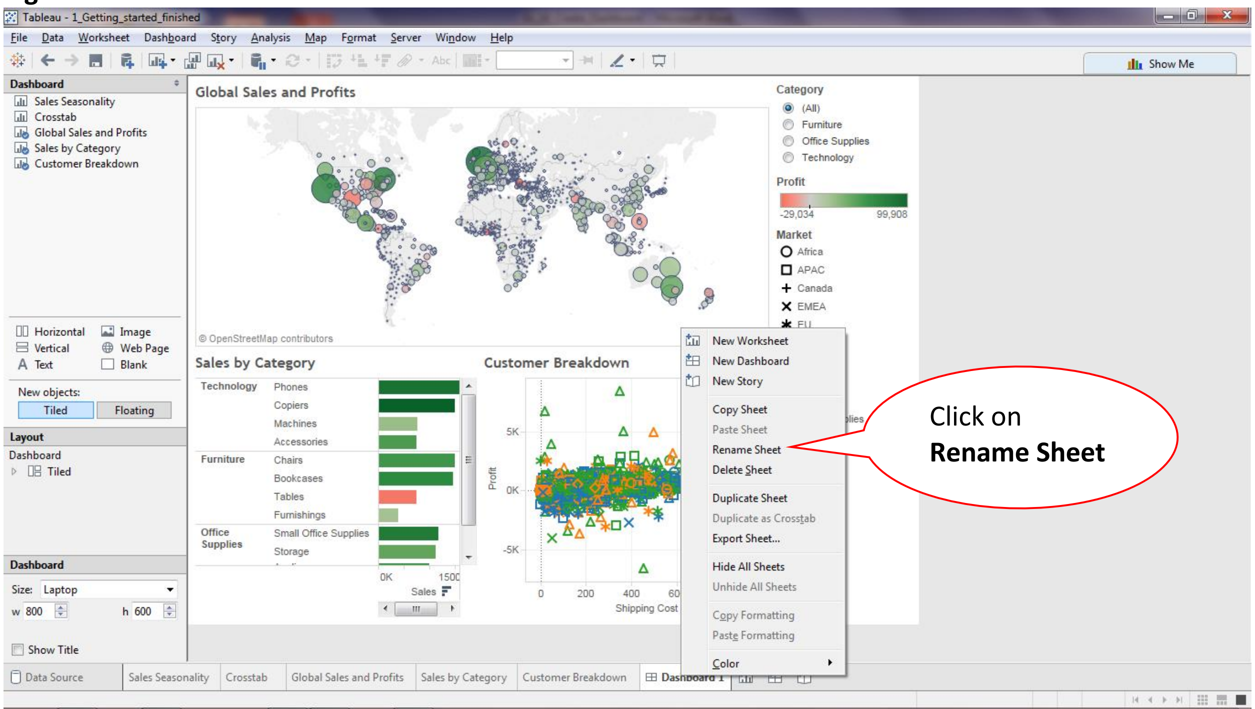
- Drag and drop the **Customer Breakdown** worksheet onto the Dashboard area, which will lead to the display on Figure 7

Figure 7



- Right-click on the **Dashboard 1** sheet as shown on Figure 7, which will lead to the menu tree displayed on Figure 8

Figure 8



- Click on **Rename Sheet** as shown on Figure 8, which will enable **Dashboard 1** to be renamed
- Rename **Dashboard 1** as **Sales Dashboard**, which will lead to the display on Figure 9, where the new dashboard name is displayed (**Sales Dashboard**)

Figure 9

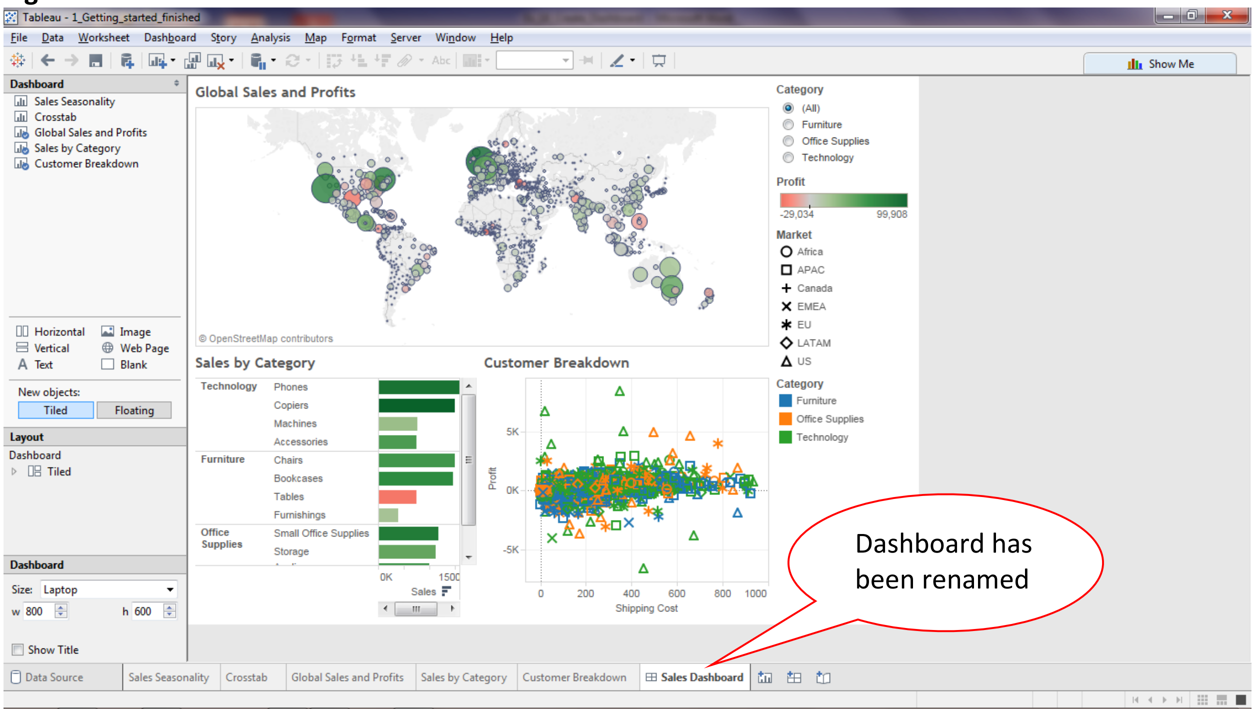


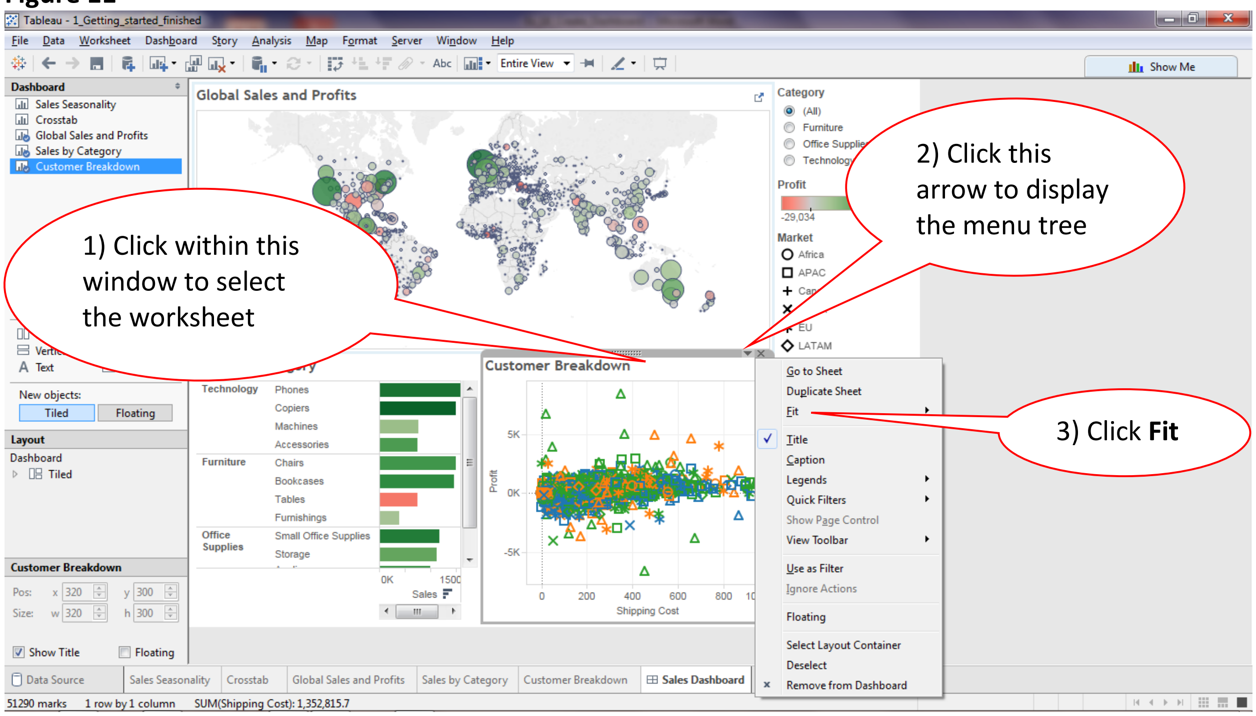
Tableau - 1_Getting_started_finished
File Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Show Me
Dashboard
Sales Seasonality
Crosstab
Global Sales and Profits
Sales by Category
Customer Breakdown
Horizontal
Vertical
Text
Image
Web Page
Blank
New objects:
Tiled
Floating
Layout
Dashboard
Tiled
Dashboard
Size: Laptop
w 800
h 600
Show Title
Global Sales and Profits
© OpenStreetMap contributors
Category
(All)
Furniture
Office Supplies
Technology
Profit
-29,034
99,908
Market
Africa
APAC
Canada
EMEA
EU
LATAM
US
Sales by Category
Technology
Phones
Copiers
Machines
Accessories
Furniture
Chairs
Bookcases
Tables
Furnishings
Office Supplies
Small Office Supplies
Storage
0K
1500
Sales
Customer Breakdown
5K
0K
-5K
Profit
0
200
400
600
800
1000
Shipping Cost
Category
Furniture
Office Supplies
Technology
Dashboard has been renamed
Data Source
Sales Seasonality
Crosstab
Global Sales and Profits
Sales by Category
Customer Breakdown
Sales Dashboard

The individual worksheets on a dashboard as well as the dashboard itself are customizable. Clicking on a worksheet will display a pulldown arrow, through which various options can be accessed.

To customize the **Customer Breakdown** worksheet in the dashboard:

- Click within the **Customer Breakdown** window as shown on Figure 11, which will display its pulldown arrow

Figure 11

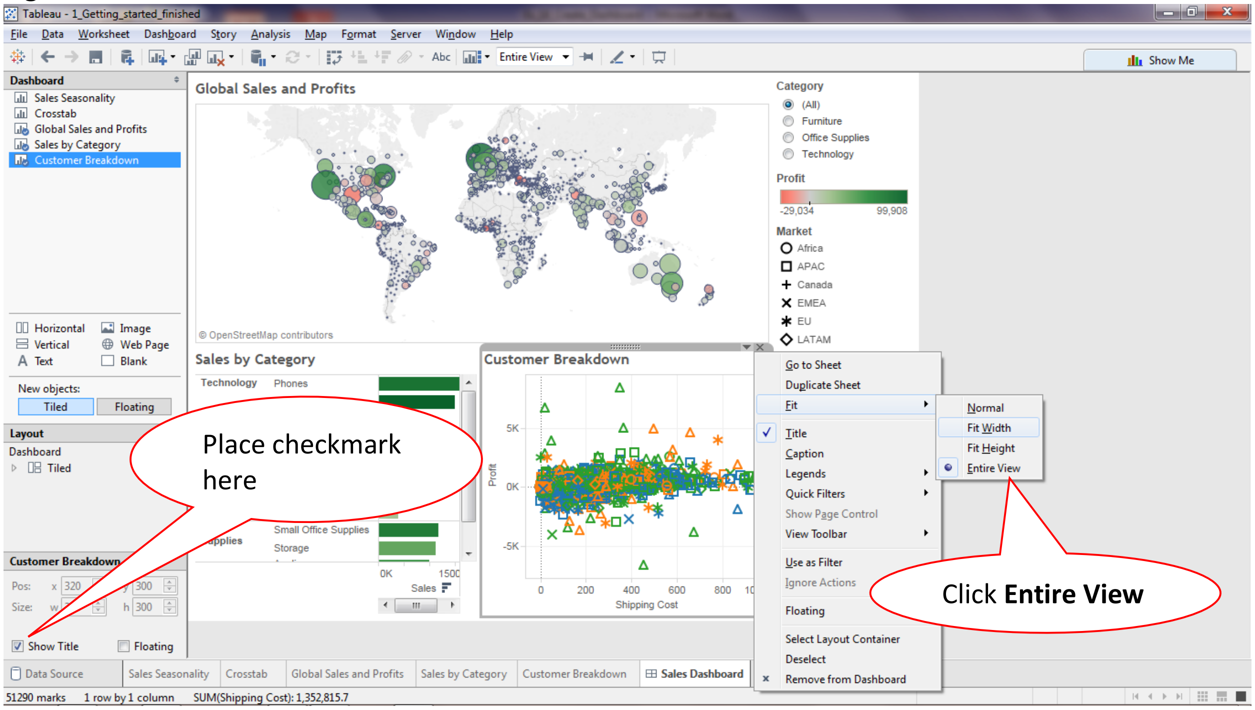


- Click the **Customer Breakdown** pulldown arrow, which will lead to the menu tree displayed on Figure 11

As the menu tree options indicate, there are many options for customizing the worksheet.

- Click on **Fit** as shown on Figure 11, which will popup the secondary menu tree displayed on Figure 12

Figure 12



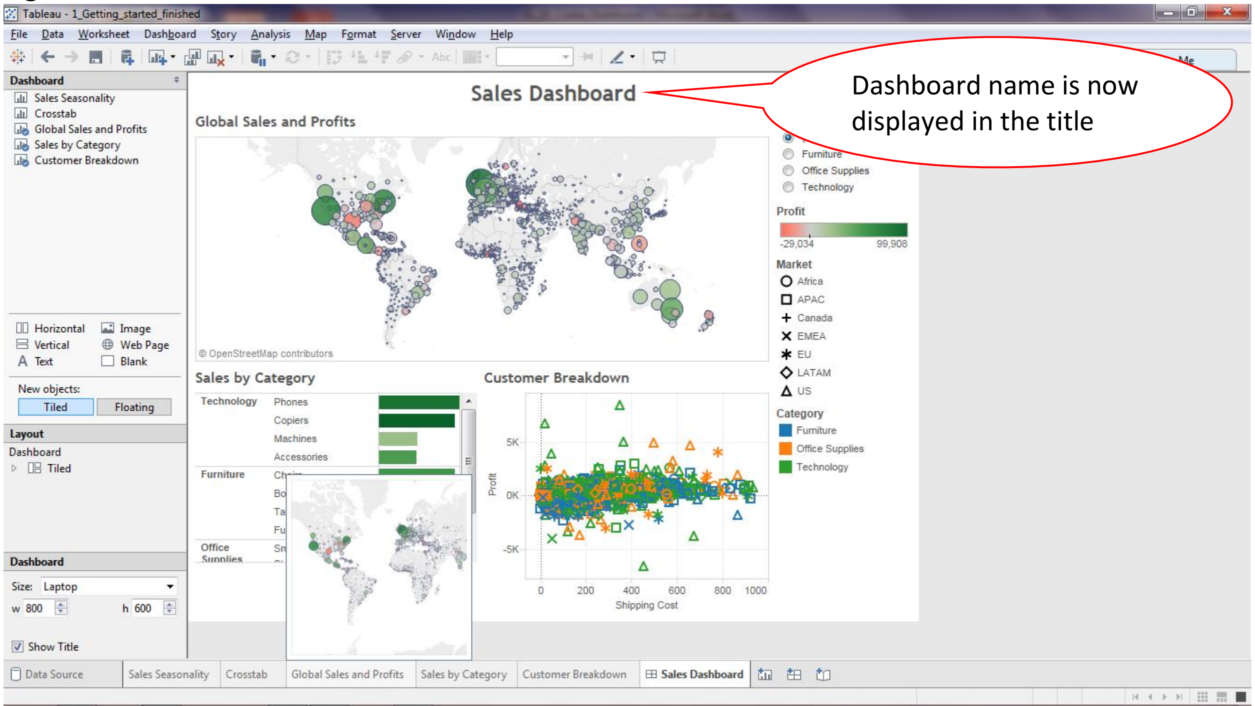
- Click **Entire View** as shown on Figure 12, which will only apply to the **Customer Breakdown** worksheet

To display the dashboard name in the title:

- Place a checkmark next to **Show Title** as shown on Figure 12

This will place the dashboard name (**Sales Dashboard**) in the title as shown on Figure 13.

Figure 13



Dashboard items can be rearranged and/or resized as desired. Figure 14 shows the new **Sales Dashboard** layout after its three worksheets were rearranged though simple drag and drop operations.

Figure 14

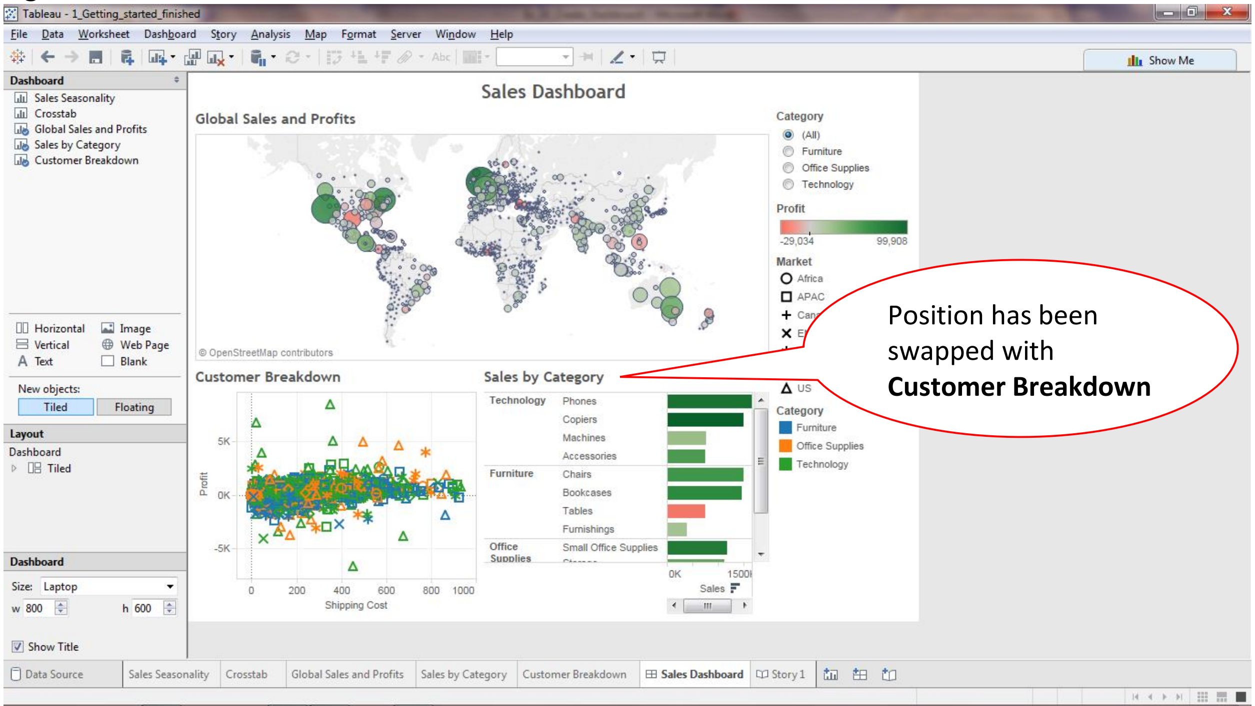


Tableau - 1_Getting_started_finished
Sales Dashboard
Global Sales and Profits
Customer Breakdown
Sales by Category
Category
Profit
Market
Position has been swapped with **Customer Breakdown**
Sales Seasonality
Crosstab
Sales Dashboard
Story 1