

Design a Data Dashboard Final Project

Text Hierarchy and Screenshots

Ramya Ramachandra

Introduction

Our first tactical dashboard was a hit, which means we have attracted some attention. Now the entire executive team wants a more strategic view of the business.

You need to create a dashboard that allows the team to see:

- Top-level revenue, profit, average profit ratio, and units sold
- YoY performance by segment (segment refers to Corporate, Consumer, Home Office)
- Monthly trend of the current year by segment (segment refers to Corporate, Consumer, Home Office)
- View category performance
- Best performing sub-category within each customer segment

Besides the content, the difference between this dashboard and the previous one is the emphasis on performance. Your executive audience has no time to make all the comparisons themselves. They need you to emphasize the main points of interest they will relay to their team leads for further investigation and discuss among themselves regarding strategy.

Project Overview

In this project, you will incorporate the new skills you have learned around the dashboard designed to grab your audience's attention. We will be emphasizing key elements of the dashboard that continue acknowledging the audience's level of graphicacy, conscious management of color to avoid confusion, and our innate ability to identify patterns so those who find your dashboard are drawn to the key points.

Datasets

For this project, you will be working with the same dataset: Superstore to build our KPI dashboard.

Project Steps

Below are steps you can follow to complete each component of this project.

I Ensure your audience can access the information below:

- Top-level revenue, profit, profit ratio, and units sold for 2018
- YoY performance by customer segment (customer segment refers to Corporate, Consumer, Home Office)
- View sub-category performance by the active metric
- Best-performing sub-categories within each customer segment for the chosen metric
- Demonstrate a clear use of alignment so users can easily navigate the UI
- Use color to clearly call attention to the marks that matter most
- Create a text hierarchy to further organize the information on the screen in a separate document
- Add information to areas of the screen users may have questions about

Tableau Typeface

Dashboard title text

Font	Font Weight	Font Size
Tableau Book	Bold Regular	18pt 9pt

Body Text

Typographic Hierarchy

Axis Number - Tableau Book / 9pt/Regular/ Dark Grey

Sub-Category names - Tableau Book / 9pt/Regular/Dark Grey

Segment names (Monthly Trend) - Tableau Book/9pt/Regular/Dark Grey

Segment names(Sub-category) - Tableau Book/9pt/ Regular/ Dark Grey

Filters and Parameters - Tableau Medium / 9pt/Black

BAN Text

Typographic Hierarchy

BAN Text Values - Tableau Book/ 16pt/Regular/Dark Grey

BAN Text description - Tableau Book/9pt/Regular/Dark Grey

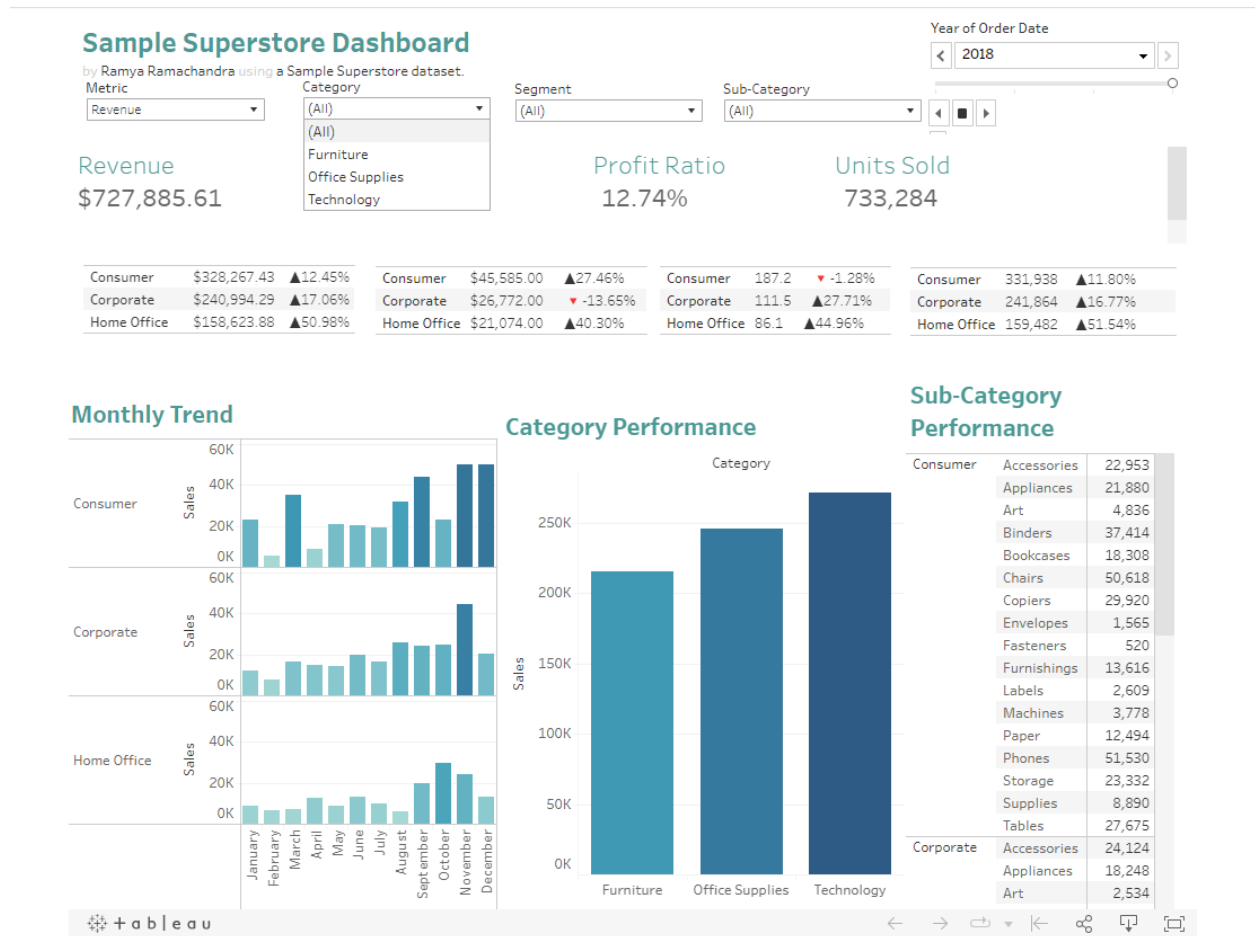
Context/instructive text(via Tooltips)

Typographic Hierarchy

Tableau Book/9pt/Regular/Dark Grey

Dashboard ScreenShots

The following is a screenshot of the dashboard with no filters applied for 2018:



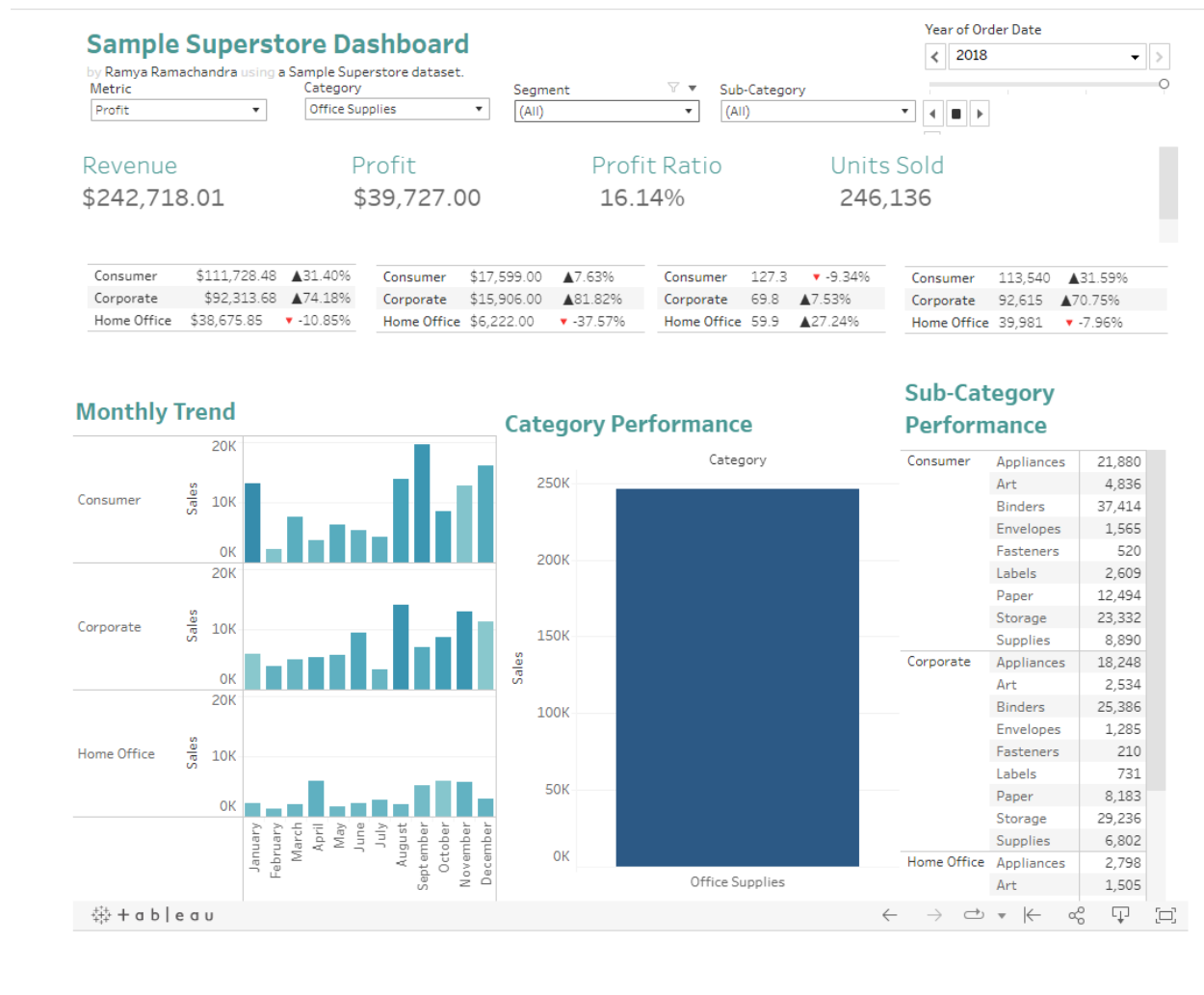
Dashboard link:

https://public.tableau.com/shared/WHQP3DCZ8?display_count=n&origin=viz_share_link

YoY Performances KPIs

The year-over-year (YoY) performance is updated based on the changes made to the year of interest, reporting metrics, segment category, and sub-category.

For instance, when you modify the metric and sub-category values, you will observe that the YoY performance is updated, and the KPI arrow indicators illustrate the percentage change over the previous year.



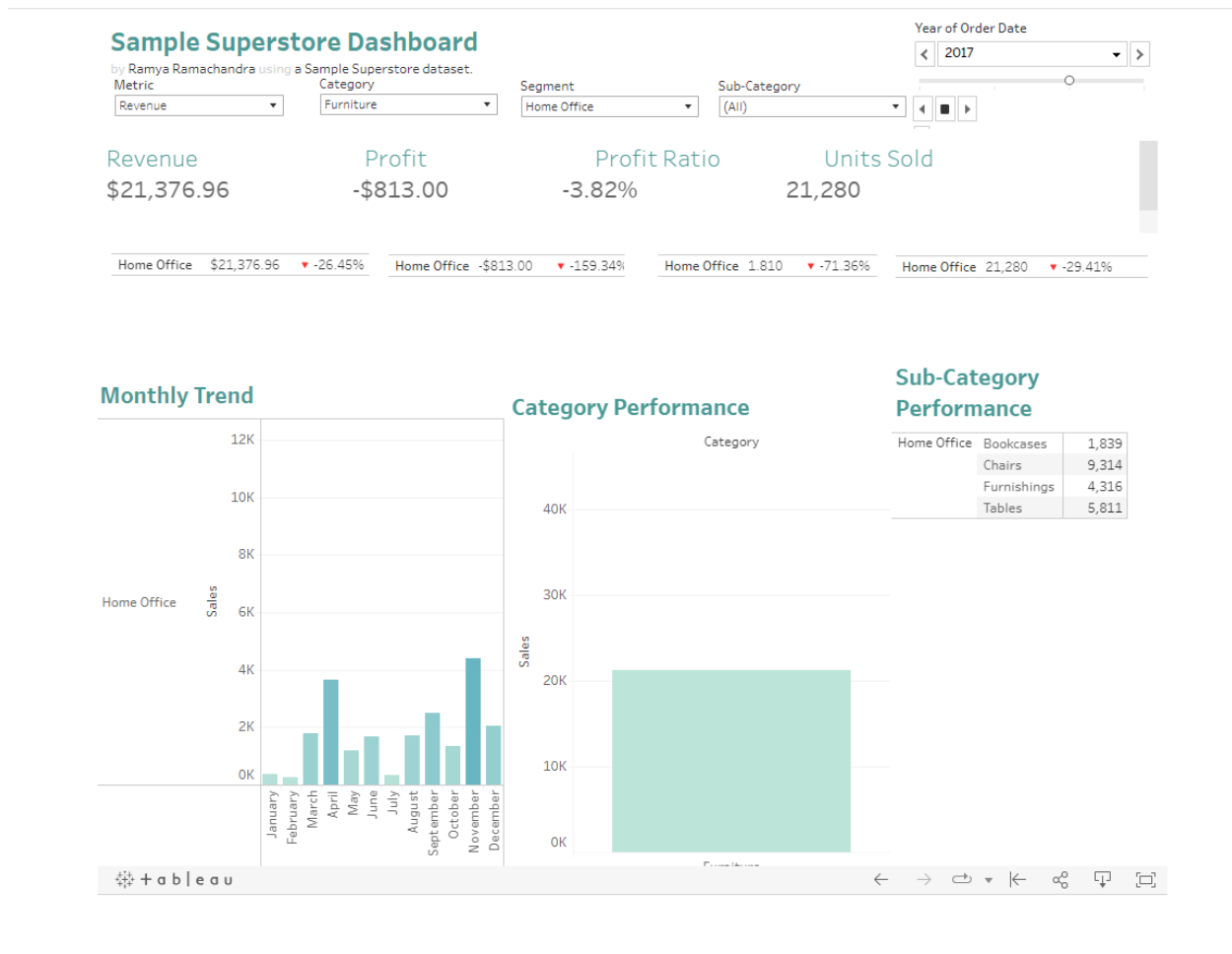
Monthly Trends by Segment, Category, and Sub-Category Performance

Whenever any of the filters are changed, the three visualizations located at the bottom of the page are updated accordingly.

For instance, we have currently filtered the results based on the metric of revenue and only for the home office segment. Within this segment, we are specifically interested in the revenue generated from the sales of furniture and office supplies.

As a result, we can observe that chairs are our best-selling home office product, followed by tables. Moreover, the category performance for office supplies is not as

impressive as that of furniture. This can also be seen in the sub-category performance, with furnishings and bookcases bringing in the least revenue.



Time Periods

When Changing the year, the dashboard components update to reflect the year's worth of data:

Sample Superstore Dashboard

by Ramya Ramachandra using a Sample Superstore dataset.

Metric

Profit Ratio

Category

(All)

Segment

(All)

Sub-Category

(All)

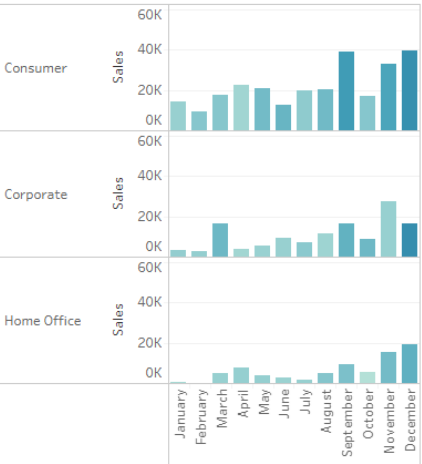
Year of Order Date

2016

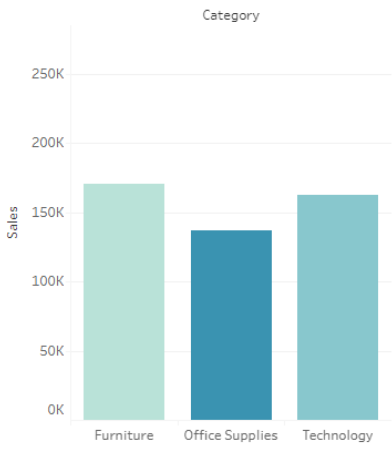
Revenue	Profit	Profit Ratio	Units Sold
\$465,417.51	\$61,606.00	13.09%	470,560

Consumer	\$264,474.84	▲0.44%	Consumer	\$28,453.00	▲17.04%	Consumer	115.0	▲26.36%	Consumer	266,559	▲0.17%
Corporate	\$127,131.67	▲0.48%	Corporate	\$20,688.00	▲53.24%	Corporate	80.7	▼-7.59%	Corporate	128,760	▲0.25%
Home Office	\$73,811.00	▼-17.29%	Home Office	\$12,465.00	▲6.46%	Home Office	51.9	▼-10.07%	Home Office	75,241	▼-16.13%

Monthly Trend



Category Performance



Sub-Category Performance

Consumer	Accessories	26,401
	Appliances	13,426
	Art	3,005
	Binders	24,889
	Bookcases	23,020
	Chairs	37,887
	Copiers	10,600
	Envelopes	1,795
	Fasteners	359
	Furnishings	10,762
	Labels	1,712
	Machines	16,712
	Paper	7,453
	Phones	38,685
	Storage	25,515
	Supplies	1,593
	Tables	22,745
Corporate	Accessories	6,159
	Appliances	4,344
	Art	2,099