Design a Data Dashboard Final Project

Practicing Tableau & Alteryx

Data Visualization Nanodegree Program

UDACITY

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Design a Data Dashboard Final Project
Introduction

Introduction

Our first tactical dashboard was a hit, which means we have attracted some attention. Now the full 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

The difference between this dashboard and the previous, besides the content, is the emphasis on performance. Your executive audience does not have the 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 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.

Tableau Tutorials

If you need some additional help navigating Tableau and getting your visualizations set up, the Tableau website offers training videos and tutorials that can guide you through the process.

Datasets

For this project, I will be working with the same dataset fro previous project: **Superstore** to build our KPI dashboard.

Project Steps

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

I must ensure my 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

Project Submission

Your deliverable will be a link to your data story published to your Tableau Public account.

- Link to your Tableau Public file;
- Google document capturing the text hierarchy for your dashboard design.

Your project must Meet Specifications in each category within the Project Rubric in order for your submission to pass.

Design a Data Dashboard Final Project
Development

Before building dashboard in Tableau I analyzed and prepared data in Alteryx. I present in sequence the workflow I developed with this purpose.
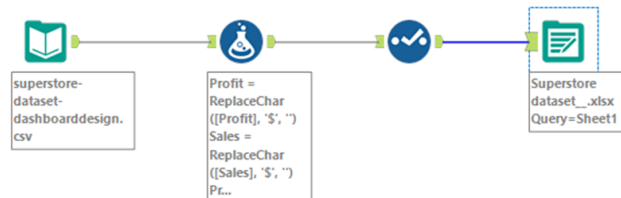
I developed an interactive dashboard aiming to meet the requests of management audience.

I highlight that insights are available selecting the parameters
- Metric   →   Sales, Profit, Profit Ratio, Units Sold
- Year
- Category
- Sub-Category
- Segment

The first visualization is the next one with default selection.
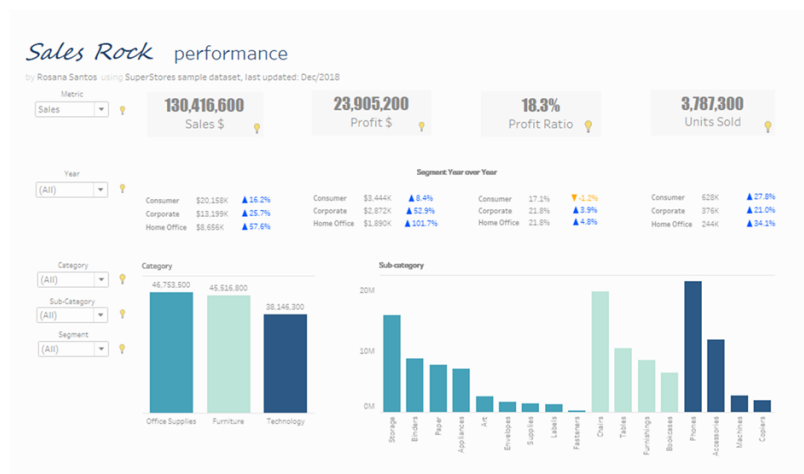

Image 1, Tableau dashboard overall visualization

Click the following link to access the Tableau dashboard developed as Design Data Dashboard Final Project part of my Data Visualization Nanodegree Program.

https://public.tableau.com/profile/rosanafss#!/vizhome/SalesRockPerformance/Performance

I developed the recommended steps on project to aggregated value to dashboard and turn it more effective.

o Demonstrate a clear use of alignment so users can easily navigate the UI
o Use color to clearly call attention to the marks that matter most
o Add information to areas of the screen users may have questions about
o Create a text hierarchy to further organize the information on the screen in a separate document
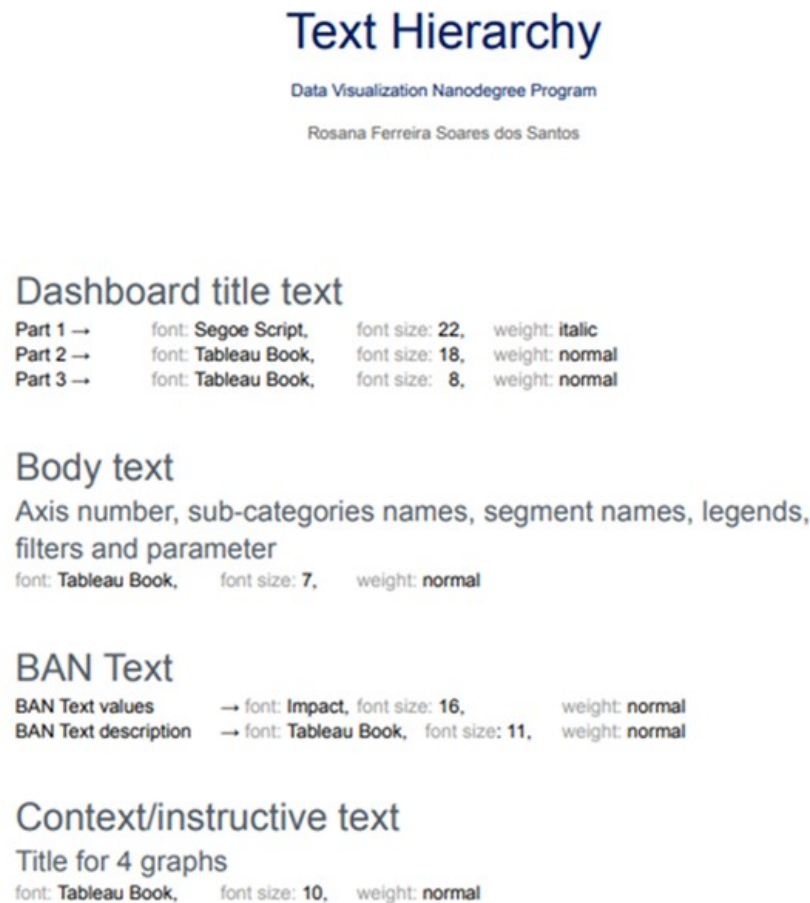
Text Hierarchy

Data Visualization Nanodegree Program

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Dashboard title text

Part 1 →	font: Segoe Script,	font size: 22,	weight: italic
Part 2 →	font: Tableau Book,	font size: 18,	weight: normal
Part 3 →	font: Tableau Book,	font size: 8,	weight: normal

Body text

Axis number, sub-categories names, segment names, legends, filters and parameter

font: Tableau Book,   font size: 7,   weight: normal

BAN Text

BAN Text values	→ font: Impact,	font size: 16,	weight: normal
BAN Text description	→ font: Tableau Book,	font size: 11,	weight: normal

Context/instructive text

Title for 4 graphs

font: Tableau Book,   font size: 10,   weight: normal

Image 2, Text hierachy

I will present from here images of dashboard in operation based on executive team questions.

Top-level revenue, profit, profit ratio and units sold for 2018.

When selecting <u>Year</u> the 4 BAN´s remain available independently of changing <u>Metric</u> selection. They change value when changing Year selection.
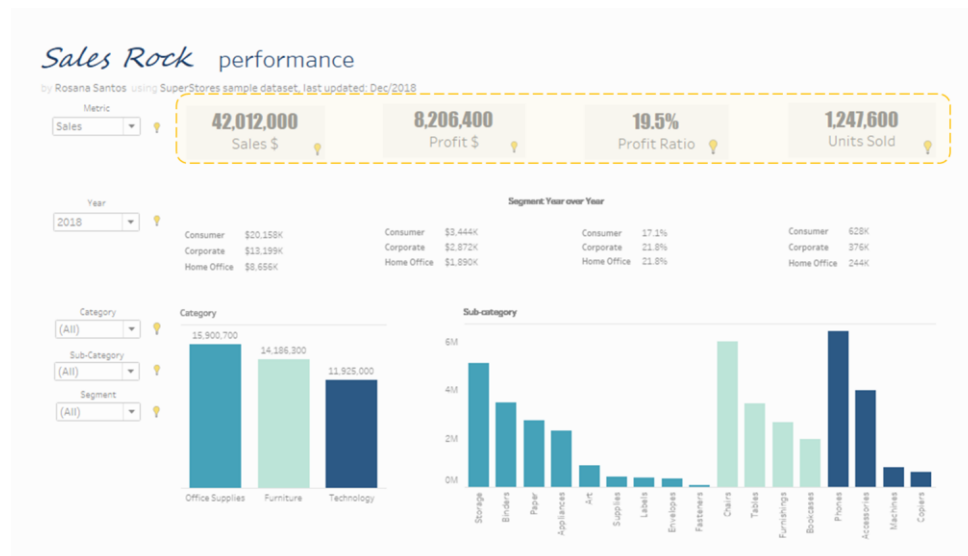

Image 3, Top-level metrics visualization

YoY performance by customer segment (customer segment refers to Corporate, Consumer, Home Office).

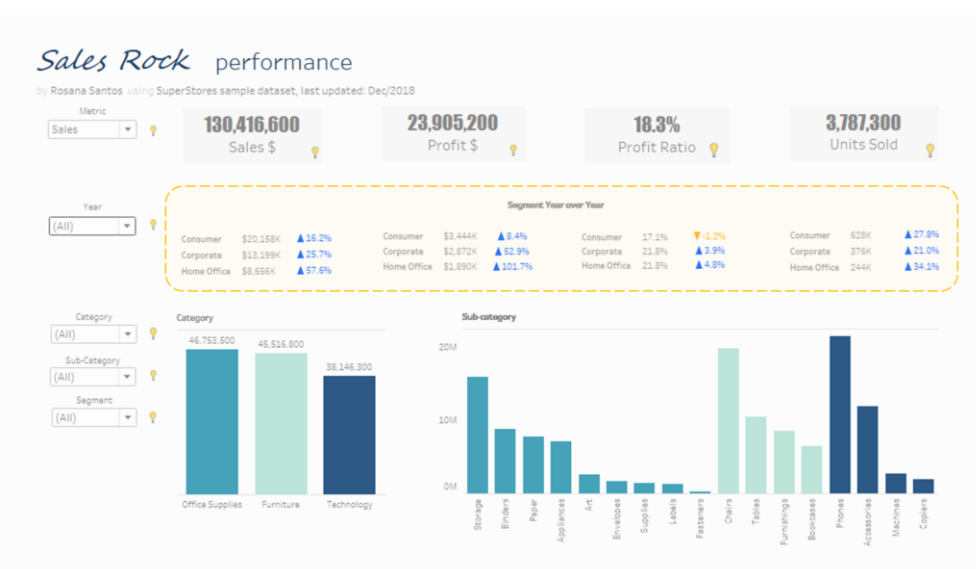Considering the parameters default selection dashboard presents segment performance Year over Year for all costumer segments.

Image 4, YoY performance visualization for all costumer segments

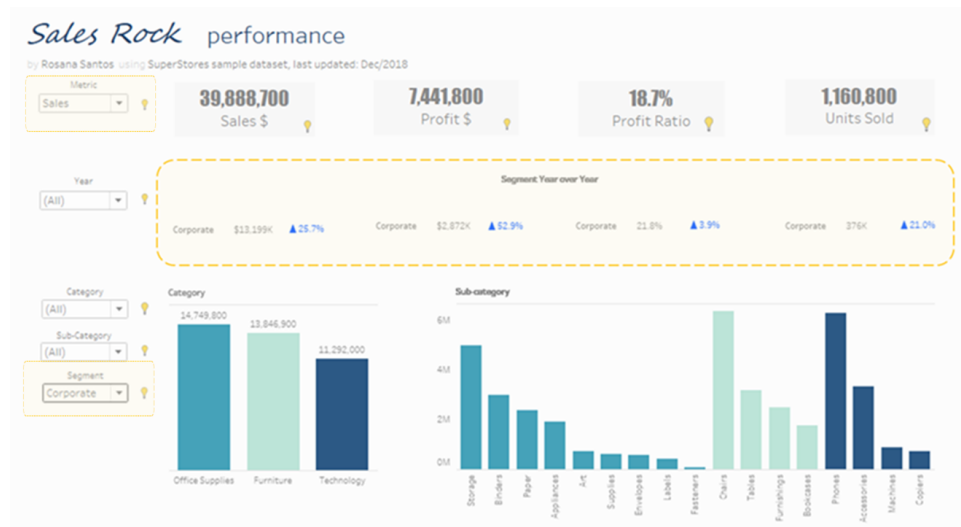In case user selects a specific segment visualization will be updated reflecting the following image.

Image 5, YoY performance visualization for a specific segment

View sub-category performance by the active metric.

Sub-category performance is interactive because When any of selection fieds change its visualization values also changes.
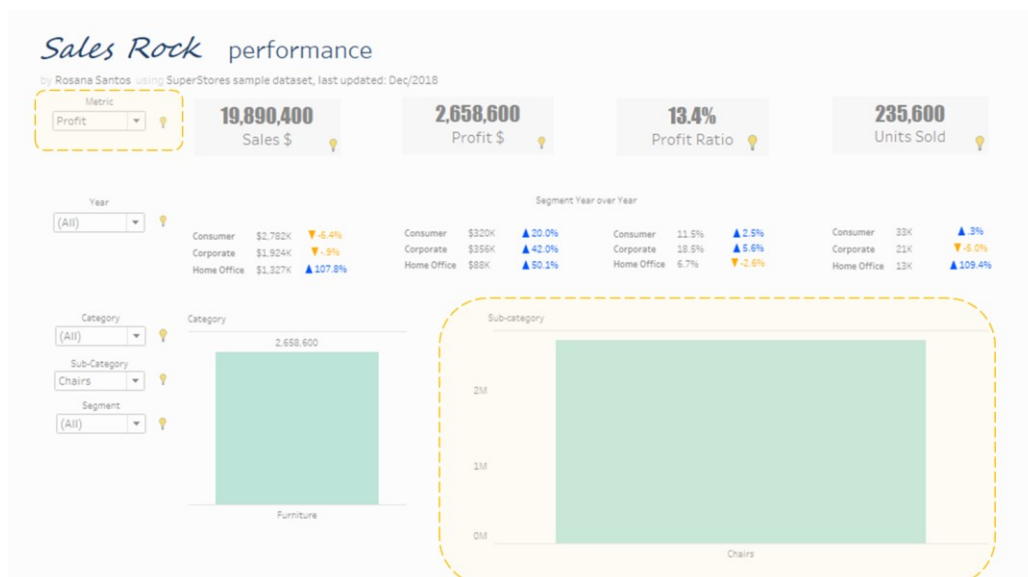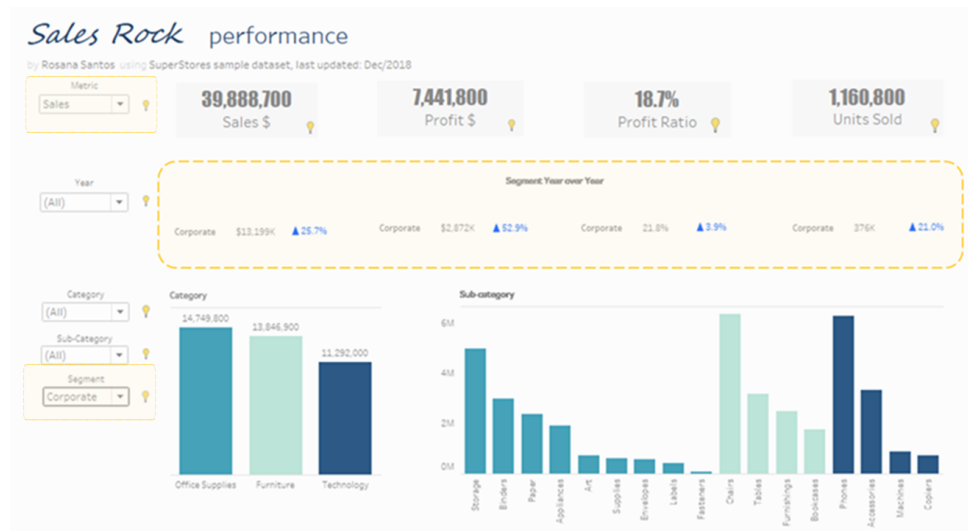

Image 6, sub-category performance visualization by active metric

Best performing sub-categories within each customer segment for the chosen metric.

Below I present again (Image 5) the interactivity selecting "Sales" as Metric and "Corporate" as Segment. User will be able to visualize sub-categories performance for the selected segment.

Data is a better idea.

Data driven organizations monitor their metrics regularly.

Interactive dashboards make it easy and effective to understand and inform strategic decisions.

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