HR Dashboard Preparation Process

1. Reference Document

All work will be executed in alignment with the requirements and scenarios defined in the **HR Dashboard User Story (PDF file)**. This document acts as the foundation for understanding business needs, expected outcomes, and user requirements.

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2. Dashboard Theme

The chosen theme for the dashboard ensures clarity, professionalism, and visual consistency.

- **Background Color:** #1E1E1E

- **Accent Color:** #00BFFF

This color scheme provides high contrast for readability while maintaining a modern look and feel.

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3. Dashboard Development Phases

The dashboard development process will be divided into three major phases:

Phase 1: Building Data Sources

Steps involved in preparing and validating the data:

1. **Collecting Data** – Gather required data from HR-related sources.

2. **Connect Data with Tableau** – Establish connections with relevant databases/files.

3. **Build Data Model** – Structure relationships between datasets.

4. **Check Data Quality** – Validate accuracy, completeness, and consistency of data.

5. **Check Data Type** – Ensure correct data formats (string, date, numeric, etc.).

6. **Understand and Explore Data** – Perform initial analysis to identify trends, distributions, and anomalies.

Phase 2: Building Charts

Steps to transform requirements into meaningful visualizations:

1. **Analyze Requirements** – Refer to the *HR Dashboard User Story* to identify key metrics and KPIs.

2. **Initial Formats for Sheet** – Prepare basic worksheet structures.

3. **Create Calculated Fields and Test Them** – Build required measures and dimensions for analysis.

4. **Build Charts** – Create visuals (bar, line, pie, etc.) based on HR metrics.

5. **Format Charts** – Apply consistent formatting for readability and alignment with the dashboard theme.

Phase 3: Building Dashboard

Steps to assemble and refine the final dashboard:

1. **Plan the Dashboard** – Define layout, structure, and placement of charts.

2. **Create Container Structure** – Use layout containers in Tableau for organization.

3. **Put All Together** – Add charts, filters, and components into the dashboard.

4. **Fix Colors** – Apply theme colors for consistency.

5. **Fix Texts** – Ensure labels, titles, and annotations are meaningful.

6. **Refine Charts** – Adjust design and details for better insights.

7. **Fix Spacing** – Optimize alignment and spacing for clean visual flow.

8. **Fix Tooltips** – Customize tooltips for clarity and relevance.

9. **Add Filters & Legends** – Enhance interactivity and interpretation.

10. **Add Logos & Icons** – Incorporate branding elements for professional presentation.

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4. Outcome

By following this structured process, the final HR Dashboard will:

- Align with the HR Dashboard User Story.

- Provide accurate, validated, and meaningful insights.

- Maintain a consistent and professional visual design.

- Enhance user experience through interactivity and clarity.