DIT Internal Dashboard Standards

# Main Dashboard Page(s)

A dashboard should be either a single or multiple charts on a page. A workbook can contain multiple dashboard tabs (or stories if shown in story view).

Whether a single dashboard or multiple, all workbooks should contain a Guidance Notes tab as the last tab in the report.

## Dashboard Layout

* Size: Custom fixed size - 1900x825 pixels
* Layout style:
  + The dashboard should be created with tiled layout containers, floating is strongly discouraged.
  + Elements should be grouped and/or separated (depending on use use) to give the dashboard breathing room and a more cohesive feeling between elements.
  + Limit the number of sheets used on your dashboard wherever possible.
  + All elements should be fit to: ‘Entire view’ unless you want vertical or horizontal scrolling, in that case select fit to ‘width’ or ‘height’ respectively.
  + Whether you are using story layout or dashboards with tabs, the guidance should be applied the same.
* Formatting:
* The dashboard should be formatted as the first grey (#f5f5f5) which will show as a background to your dashboard.
* Each ‘group of elements i.e. the dashboard title section should be grouped in a layout container with a white background. Outer padding of 4 should be applied to all sides to give it breathing room from the next element.

## Dashboard Header & Title

* Layout container height: 75px
* Order from left to right:
  + Frontiers Logo: 200 px width – fit & centred
  + Dashboard title Text: 1500 px width – Text centre aligned over 2 rows (title and sub-title).
  + Blank: 100 px width, between text & DIT logo
  + DIT Logo: 100 px width – fit & centred
* Font & formatting:
  + Dashboard title: Bold, font size 18 – clear & concise.
  + Sub-title: on the row below, font size 12 – short descriptive sub-title, call out key info used
  + Layout container to be formatted as a single block without visible spaces between elements
  + Images to be used shown in appendix.
  + DIT Logo should be inserted with a URL to: <https://frontiersin.sharepoint.com/DR/SitePages/Home.aspx>
  + Under the header row there should be a single line 2px in height (if easier insert a coloured blank 10px in height with 4px of outer padding) in the light blue colour from the DIT logo. (HTML: #46c4f6)

## Controls section

* The dashboard controls section should be 60px in height (120px for a double height when 2 rows of filters are needed) and contain three separate containers – from left to right:
  + Dashboard Controls (350 px width)
  + Filters (1350 px width)
  + DIT Call Out (50px width)
  + A thin grey (first grey line of 2px should be place between each section (easiest to do with a 10 px line with 4 px outer padding applied).
  + The above may need to be tweaked slightly depending on your exact filters.
* Size:
  + Main dashboard controls to be in left layout container, with filters in the centre container. Visual separation between the two groups.
  + Layout container height should be 60px (120 px for a double row of filters)
  + Filters should be placed on one, or at maximum, two rows
  + All filters should be the same width, recommended width 150-200 px
  + Spacers should be inserted between filters of different types, recommended width 50 px (i.e. between taxonomy & geography)
* Order & Grouping:
  + Main dashboard controls in the left layout container – i.e. measure & dimension selector, chart type control etc.
  + Filters should be placed in groups aligned with accepted business hierarchies. (i.e. ‘Program, Journal, Section’ and ‘Continent, Country’)
  + Each group of filters should be separated from the next with a blank spacer.
* From left to right the filters should be placed in the order: Top Row - Taxonomy, Region, Date Filter (date can be on top or bottom row), 2nd Row - Other filters
  + If these filters don’t align with the ones used on your dashboard just ensure that the key filters are shown on top left.
  + If your report has multiple dashboards ensure that filters are shown exactly the same on all views.
  + In the right hand container the icons for ‘info’ and ‘email’ should be placed vertically (50px each) on top of each other for a double row of filters, or side by side (50 px each) for a single row.
  + Email icon, when clicked should launch an email to [DI.team@frontiersin.org](mailto:DI.team@frontiersin.org) and contain info about the dashboard & view.
  + Info icon should allow the user to hover (or click) for information about the dashboard.
  + Icons to be used shown in appendix.
* Formatting:
* Filter & control titles should be Tableau Medium size 9. Font colour black.
* Filter & control text should be Tableau Book size 9. Font colour black.
* Naming of filters & elements should be written in normal English, with capitalised first letters and spaces (no underscores) between words.
* Default style: multiple value dropdown – ensure ‘Apply’ button is shown
* Single select drop down is used for any filters where multi-select is inappropriate - i.e. ‘Select Measure’ parameter
* Radio button may be used where there are very limited options and no ‘All’ value – i.e. Chart Type parameter control

## Main Chart(s) section

* The main charts section can contain a single chart (with supplementary information) or multiple charts for an analytical dashboard.

## Single chart dashboard:

* Size:
  + The dashboard should contain one main chart container (1400px x 500px), on the right-hand side one container for big numbers or details of the chart (500 px x 500 px)
  + There should be a footer, 100px high and 1900 px wide to be used for colour legend or similar.
* Order & Grouping:
  + The main dashboard chart should be set to fit to: ‘Entire View’.
  + Single chart dashboards don’t require a title on the actual chart since the dashboard title is performing this function
  + Use layout containers to group charts where you have multiple which are shown one at a time, for instance by a parameter.
  + In the right hand panel you can add BAN’s (big numbers which summarise the chart on the right). Otherwise you could add a detail chart which shows when a data point in the chart is selected. If neither of these are needed, leave this space blank.
  + The colour legend at the bottom should be legible, it doesn’t need a title.
* Formatting:
  + On the main chart the font size should be 9 for axis, and no smaller than 9 for any labels or text.
  + Colour and ordering of data items should be in line with the standards & guidance (see appendix).
  + Tooltips should be clear and concise, with any pertinent information added, for instance a description of a measure or calculation, added written in plain English.

## 4.2 Multi chart dashboard:

* Size:
* The remaining space on the dashboard (1900 x 600 px) should be divided into balanced space. They don’t have to be the same size but should feel organised on the dashboard.
* The dashboard can be extended in length should there not be enough vertical space in this layout.
* If BAN’s are required they should be placed below the filters and above the charts in a single row (suggested 120px height, depending on contents of BAN’s this may need to be smaller / larger).
* Order & Grouping:
* The ‘main’ information on your dashboard should be placed top left, with the least important information placed in the bottom right. (Tableau have completed studies to review positioning on dashboards and this is accepted best practice in data visualisation). See appendix for details on the ‘F Pattern’ studies.
* Elements for the same chart should be grouped – for instance, the title for each chart, the chart, colour legends, parameter controls which only affect one chart should all be contained in a single layout container and formatted to look connected – i.e. by using a white background.
* Elements from different charts should be formatted with space in between – i.e. using a light grey padding between each group of elements.
* Formatting:
* Titles should be Tableau Book size 15, black.
* Dynamic titles are a great way to add information to your dashboard, dynamic fields can be highlighted using the light blue from the DIT logo, adding emphasis to what is changing in the chart.
* All font in charts & axis should be Tableau Book and at least size 9.
* Colours & sort order should be followed as per guidelines.

# Guidance Notes Page

## Dashboard Layout

* Dashboard Layout size & formatting should be the same as your main dashboard pages.

## Dashboard Header & Title

* This should be the same as your main dashboard pages, showing ‘Guidance Notes’.

## Guidance Section

* Size:
  + The Guidance Section should be 500 px wide by 825 high. It should take up the left panel in the main section of the dashboard.
* Grouping & Order:
  + Within the left-hand panel there are four separate elements shown as: Title (description):
    - Dashboard Summary (Short description, purpose of dashboard, intended use & audience)
    - Data Completeness (name of data source, last updated, update schedule frequency, key inclusions & exclusions in the dashboard – i.e. only includes articles which are not deleted)
    - Release Notes (details of the last few releases and any major changes, along with date published)
    - Contact Us (Contact the Di Team & link)
  + Each element should have a title and a short description.
* Formatting:
  + The title should be Tableau Book size 15, with the text Tableau Book size 10.
  + The ‘Contact Us’ text section under the title should contain the email icon (75 px width) as used on the main dashboard page, which has a URL action launching an email to [di.team@frontiersin.org](mailto:di.team@frontiersin.org)

## Data Guide

* Size:
  + The Data descriptions section should be 1400 px wide by 825 high. It should take up the right panel in the main section of the dashboard.
* Grouping & Order:
  + Title row should contain the text ‘Data Guide’ as well as the filters for this section (field type, search by field name)
  + The table of data fields below, with these fields:
    - Field Type (dimension or measure)
    - Field Name (as shown in parameter)
    - Field Description
  + It was decided to leave out the field calculation since this may raise more questions by the business (i.e. KPI data source references Element\_ID instead of Article Id)
* Formatting:
* The title should be Tableau Book size 15, with the text Tableau Book size 10.
* Rows are banded white / lightest grey with a thin grey line between each row.

# General Formatting

## 1. Data Types

* Dates (TBC - currently in the Explorers guidelines we recommend discrete dates, but this doesn’t work for a continuous measure, i.e. line chart. Needs discussion.)
* Axis – Written in plain English.
* Text – Written in standard English. Should not be smaller than font size 9.
* Tooltips – TBC if we need standardisation.

# Appendix

## 1. Logos & Icons:

* Frontiers Logo
* DIT Logo
* Email Icon
* Info Icon
* (TBC - what other icons do we need to standardise?)

## 2. Sort & Colour:

* Dashboard highlight colours:
  + Light Blue (#46c4f6)
  + Dark Blue (#001a95)
* Dimensions:
  + See Explorers Guidelines (will be appended before this draft goes live).

## 3. Best Practice:

F-Pattern Analysis: <https://www.tableau.com/about/blog/2018/8/how-design-thinking-will-affect-todays-analysts-93507>

# Dashboard Example

<https://test.webportal.dwh.frontiersin.net/#/workbooks/730?:origin=card_share_link>