Activity Overview

In previous lessons, you connected to data sources and created data visualizations. Now, you'll cap off the process of data visualization by adding these visualizations to a dashboard. In a business context, data visualizations are most useful when they are presented in a dashboard-style format to stakeholders. Dashboards put all the pertinent information in the same place, making it easier to understand the important takeaways. Many dashboards are also constantly updating to reflect new data, and some are even interactive! No matter what style you choose, dashboards deliver essential insights to others.

By the time you complete this activity, you will be able to create and use a dashboard to present data in an accessible and interactive way. This will enable you to communicate your work and display dynamic data in professional settings.

IMPORTANT

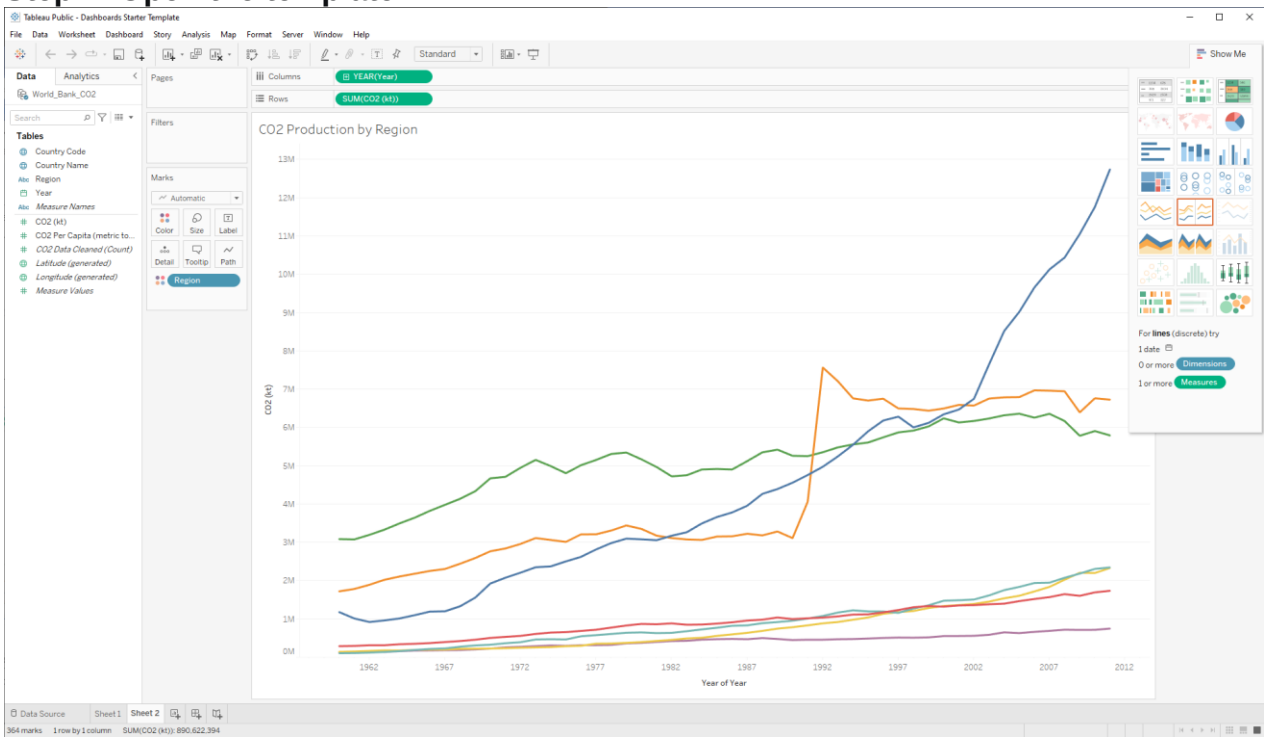
1. You will need the Tableau Public Desktop app to import the Dashboards Starter Template in this activity. For more information on downloading the Tableau Public app, check out the Reading: Optional: Using Tableau Desktop.
2. If you are unable to download the app to your device (e.g., Chromebook users), use the two visualizations you created in the last Tableau activities as Sheet 1 and Sheet 2 of this activity.

Step-By-Step Instructions

Follow the instructions to complete each step of the activity. Then answer the question at the end of the activity before going to the next course item.

Step 1: Access the dataset and template

Step 2: Open the template



Step 3: Load the data

Next, you will load the dataset.

1. Select the **Data Source** tab in the sidebar. This will open the **Data Sources** folder Tableau Public has created on your computer by default.

2. Navigate to the location on your computer where you downloaded the **CO2** dataset (filename = “CO2 Dataset.xlsx”) and open it.

3. Locate the **My Tableau Repository** folder on your computer. This is usually placed in the Documents folder of your local files. If you cannot find the folder, use the search bar in your computer’s file explorer.

4. Open the folder **My Tableau Repository**, then open the folder **Datasources**.

5. Drag your datasets for Tableau from where you downloaded them into the **Datasources** folder. This will help you keep track of your datasets for various projects and stay organized.

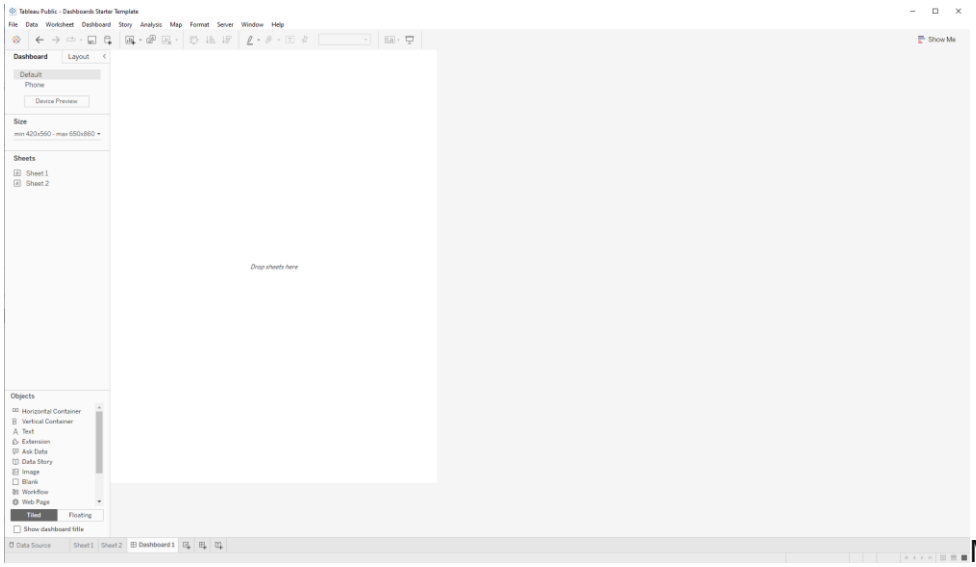
Note: As a best practice, you should always move your datasets for Tableau into the **Datasources** folder.

Step 4: Create a dashboard

The example project contains the CO2 dataset which has two separate visualizations. Select **Sheet 1**. This visualization shows the average CO2 per capita of each country. Now, select **Sheet 2**. This visualization is a line chart of the CO2 production of each global region over time.

You will use these visualizations to create a dashboard. Select the **Add Dashboard** button, which is the middle button on the bottom row with a symbol that appears like a spreadsheet with a plus sign.

This will open a new dashboard. Your screen should appear like this:



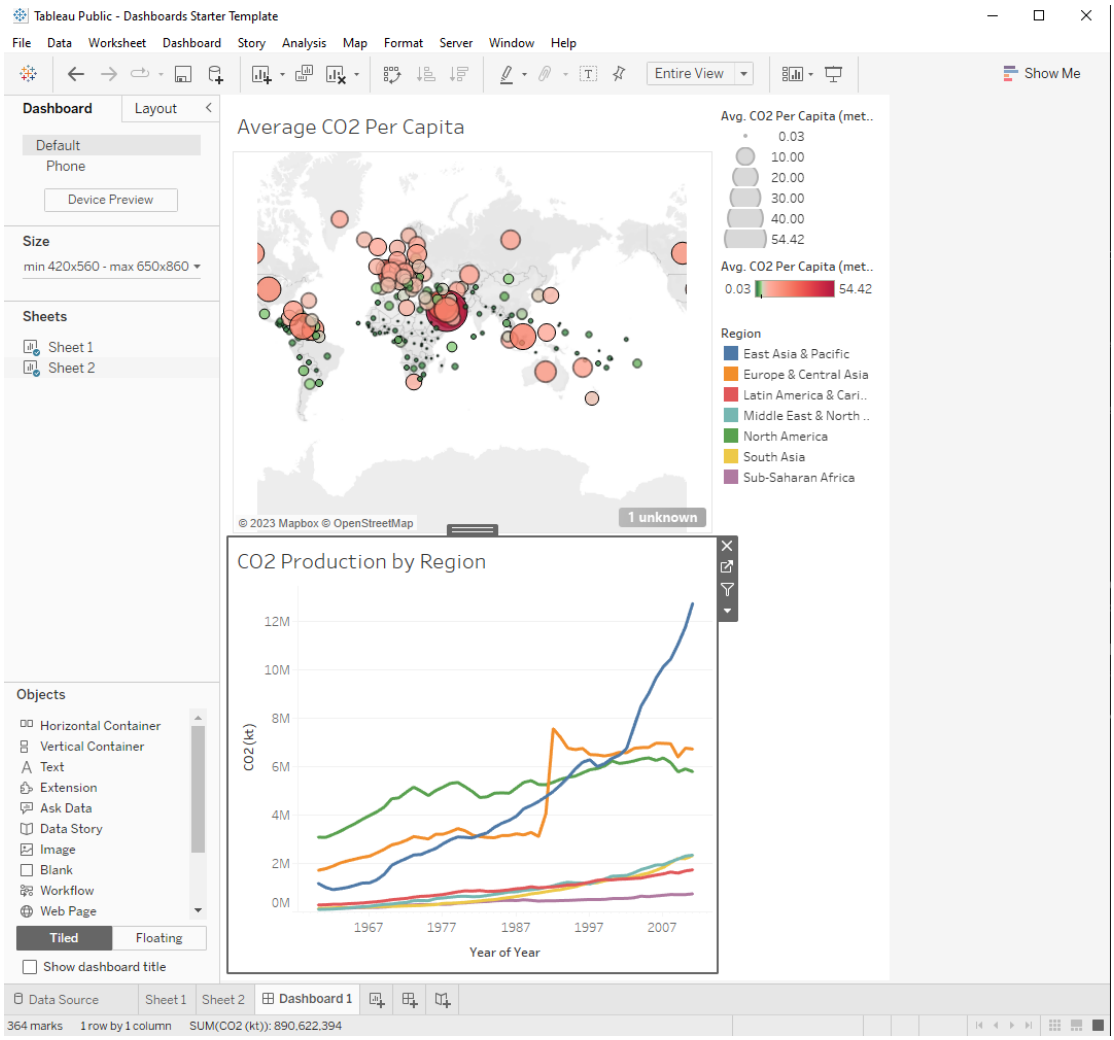
Menus across the top are File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, and Help. The Dashboard tab is selected on the left, showing size and a list of the sheets. Below this, an Objects menu lists Horizontal Container, Vertical Container, Test, Extension, Ask Data, Data Story, Image, Blank, Workflow, and Web Page. Below this are options for tiled or floating, and a checkbox to select show dashboard tile.

Step 5: Add visualizations

To add visualizations, drag the appropriate sheets onto the dashboard in the layout that you prefer. In this case, you'll add the map visualization from **Sheet 1** on top of the line graph from **Sheet 2**.

1. Start by finding **Sheet 1** in the Sheets section in the sidebar. Select and drag **Sheet 1** onto the area that says **Drop sheets here**. Sheet 1 should appear under the Sheets tab:

2. Select and drag **Sheet 2** onto the visualization. You'll notice that the visualization adjusts to show the layout depending on where you drag the sheet. Place **Sheet 2** so that it takes up the bottom half.



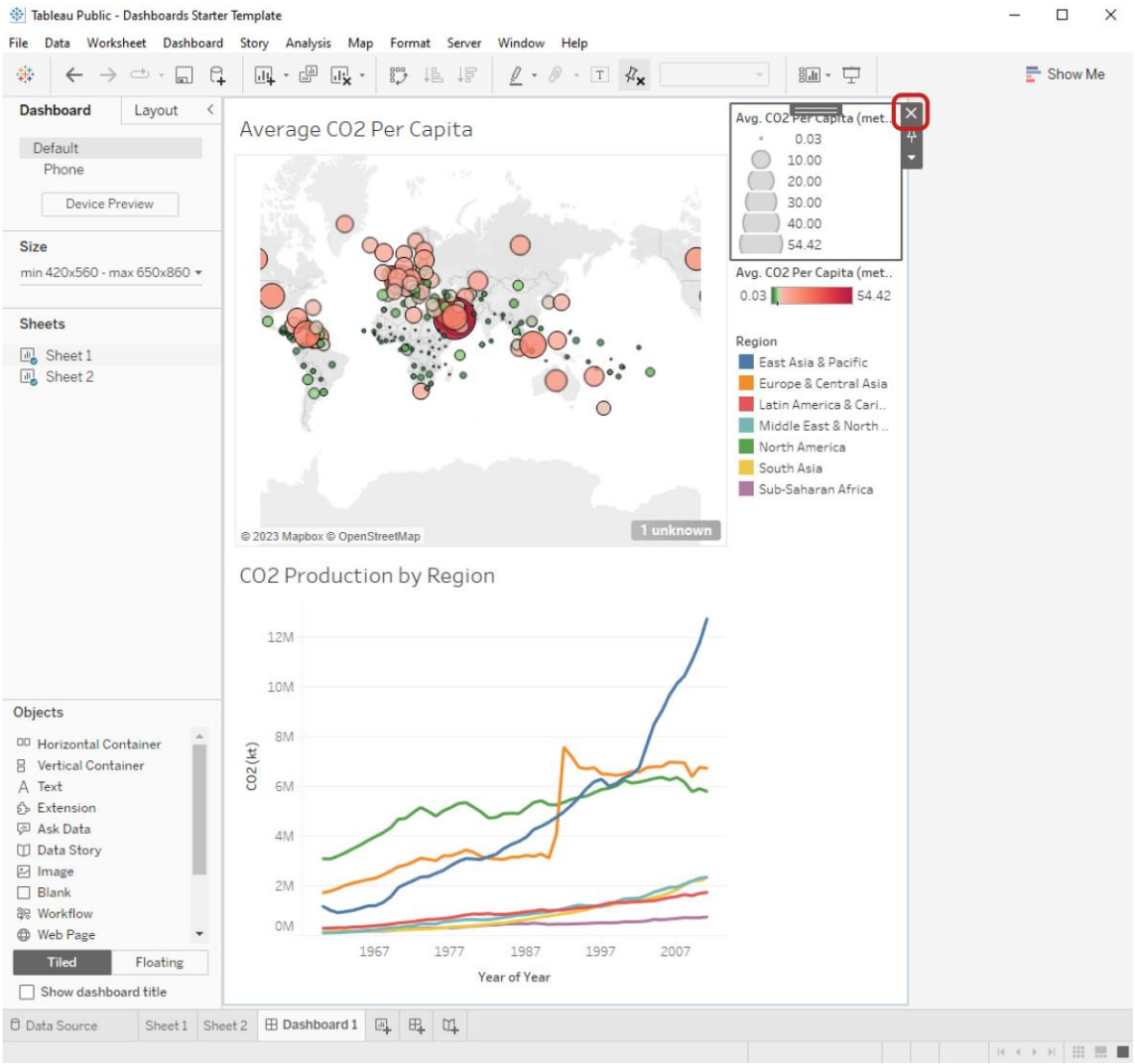
Step 6: Clean the dashboard

The dashboard currently contains three legends, but only two of them are needed. The legend of grayscale values represents the CO2 Per Capita by size.

CO2 per capita is represented by size and color. As such, Tableau creates two legends. To simplify the visualization, your best choice is to delete the topmost legend that corresponds to size.

The relationship between small and large emissions can be interpreted by the relative sizes of the circles. However, the color representing the number of emissions per capita is not interpretable without the legend.

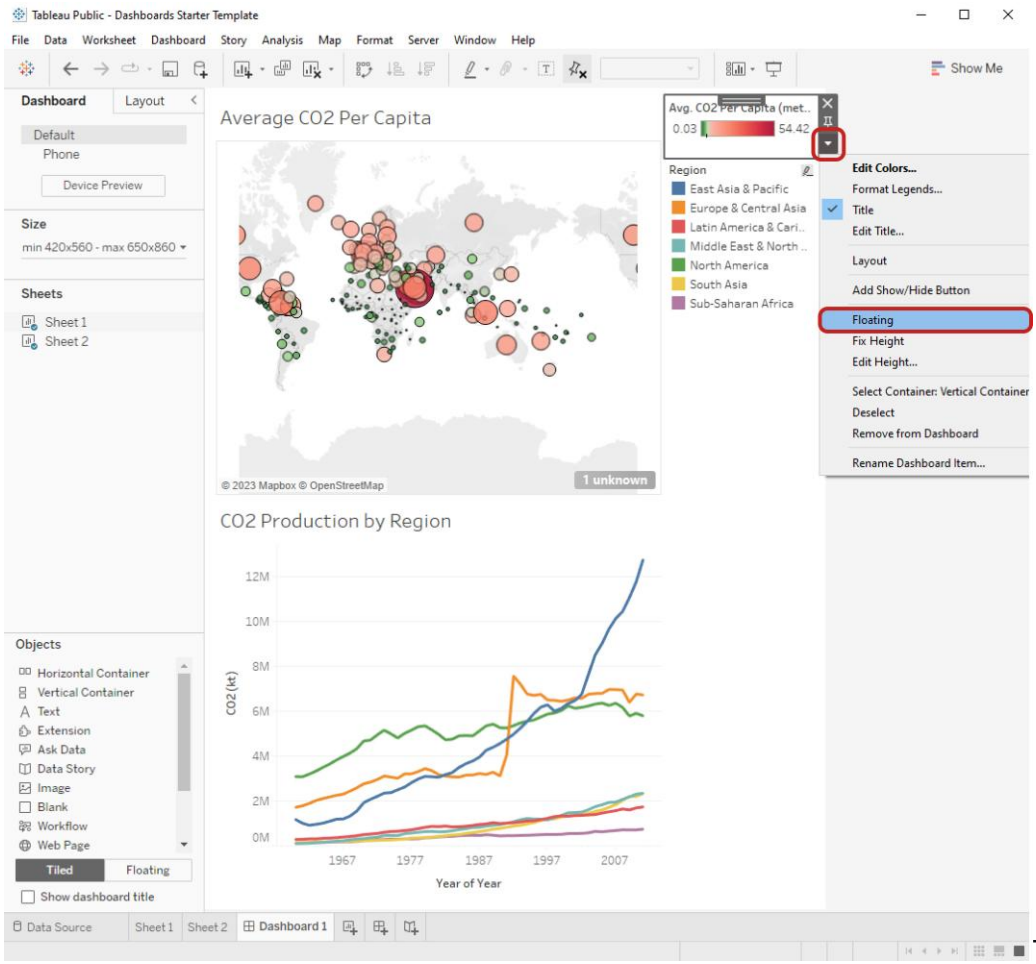
1. Delete the topmost legend. To do this, select it and then select the close button (**X**) to remove it from the dashboard.



Now that it's been removed, you'll set the remaining legends to float. This will allow you to drag the legends where you want to place them.

2. Select a legend.

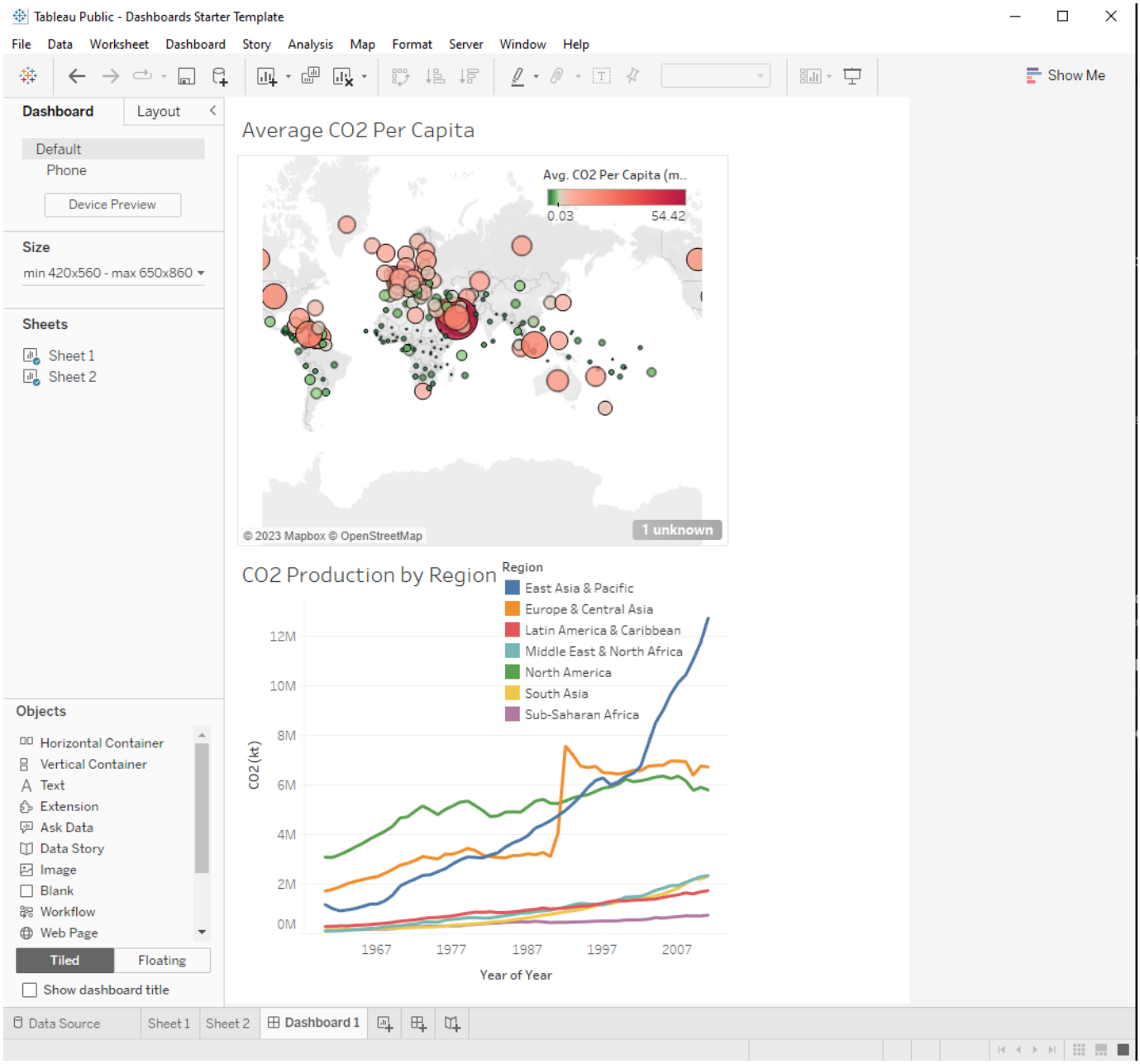
3. Select the dropdown list for **More Options**. From there, select **Floating**.



This arrow opens a menu including Edit Colors, Format Legends, Title, Edit Title, Layout, Add Show/Hide Button, Floating, Fix Height, Edit Height, Select Container: Vertical Container, Deselect, Remove from Dashboard, Rename Dashboard Item. Floating is highlighted.

4. Drag the legend onto the top-right corner of the map visualization.

5. Repeat steps 2-4 and float the remaining legend onto the top-right corner of the bottom graph. When you’re finished, your dashboard should appear like this:



You've now created a basic dashboard. Tableau contains tons of other functionality that allows for dashboards that update automatically or interactive dashboards and visualizations.

Pro Tip: Save the activity dataset and template

Be sure to save a copy of the dataset and template you used to complete this activity. You can use it for further practice or to help you work through your thought processes for similar tasks in a future data analyst role.