



Tableau / Power BI Dashboard Design Process

Analyse Requirements

Prepare Data Source

Build Charts

Build Dashboard

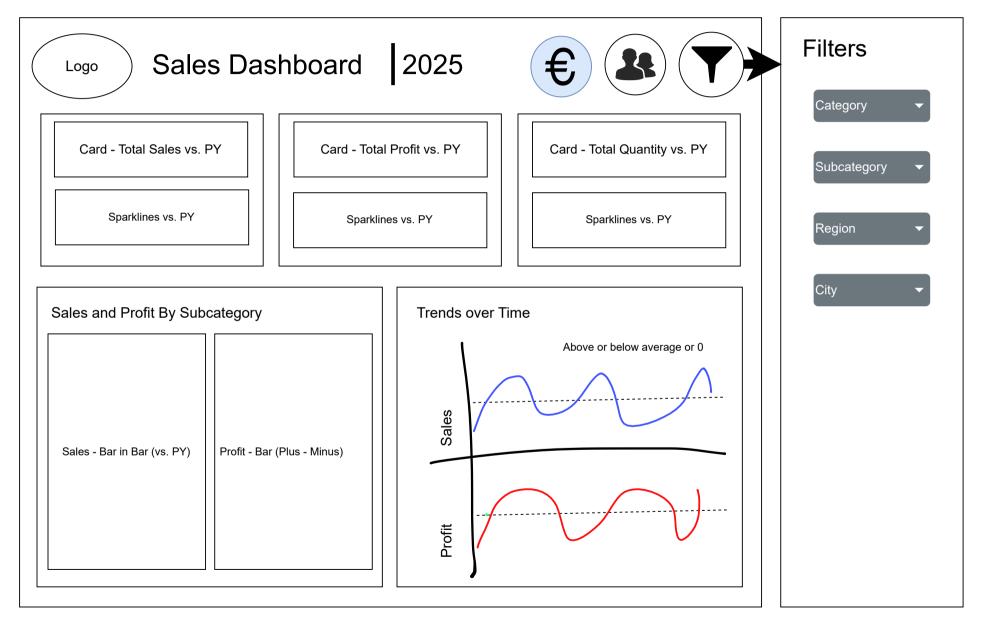
Step 1		
1.1	Collect requirements (user stories)	
1.2	Select right charts	
1.3	Draw mockups	
1.4	Select colors	

Step 2		
2.1	Connect data	
2.2	Create data model	
2.3	Rename fields and tables	
2.4	Check data types	
2.5	Understand data	

Step 3		
3.1	Create calculated fields and test	
3.2	Build chart	
3.3	Format	
	Remove lines and grids	
	Clean axis and headers	
	Coloring	
	Tooltips	

Step 4		
4.1	Draw mockup for container	
4.2	Create container structure	
4.3	Put all charts together	
4.4	Format	
	Distribute objects evenly	
	Format colors, size, etc.	
	Fit "entire view"	
	Add legends	
	Add space (padding)	
4.5	Add filters and interactivity	
4.6	Add icons	

Dashboard Mockup



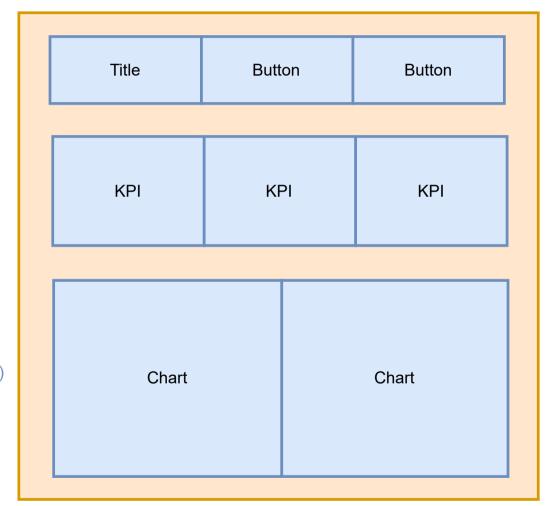
Container Mockup

Vertical containter (main)

Horizontal containter (title)

Horizontal containter (KPI)

Horizontal containter (charts)



Vertical containter (filter)

