**Tired of Documenting Tableau Dashboards? These 4 Tools Make It Easier**

**https://medium.com/@katerina.protivenskiy/tired-of-documenting-tableau-dashboards-these-4-tools-make-it-easier-e1ec07de56be**

Let’s be honest, documentation isn’t always the most exciting job on our list. We pour so much energy into building amazing Tableau dashboards because we love doing it. But documenting them? Not so much.

Yet, as Damian Conway wisely put it in “Perl Best Practices” (2005):

*“Documentation is a love letter that you write to your future self.”*

That quote perfectly sums it up. Clear notes today prevent headaches tomorrow. In other words, the main reason to invest time in documentation now is to save even more time in the future.

The documentation is not just about keeping things tidy. It helps us be more efficient and ensures our work stays useful over time. Good documentation ensures that others can easily understand your work, even if they weren’t involved in the initial development. It facilitates smooth handovers when team members transition or new ones join. Beyond that, clear documentation acts as a reliable reference point for troubleshooting, future enhancements, and maintaining data accuracy.

No one wants to end up like the guy in the picture, having spent years searching for documentation only to find it incomplete.

A comic strip of a person in a hat

AI-generated content may be incorrect.

Incomplete documentation disaster

The good news is that there are some **tools and applications** that can make parts of this process much simpler and faster. Let’s explore some of these tools. **Depending on your needs, you might find each tool helpful in different situations.**

**🔧 RapidDox**

[RapidDox](https://rapiddox.com/) is a paid app you install right on your computer. It allows you to create **technical documentation** for your Tableau or Power BI dashboards in about a minute. Simply load your Tableau workbook (or Prep flow) into the application and RapidDox then guides you through the whole process.

**How it works**

Your Tableau workbook (.twb/.twbx) is actually an XML file. This XML file holds all the information (metadata) about your dashboard. RapidDox reads this file, analyzes it, and then creates rich technical documentation for you in a human-readable format.

**What’s inside RapidDox generated documentation**

When you hit that “generate” button, RapidDox doesn’t just give you a plain summary. It digs deep into your Tableau workbook and pulls out a whole lot of detailed, technical information that’s incredibly useful.

Here are some examples of what you’ll find there:

* **Field Details:** It lists all your fields, noting if they are actually being used anywhere. For calculated fields, it even shows the exact formulas used.
* **Data Source Insights:** You’ll get a clear overview of every data source your workbook is connected to. It tells you whether they are live or extracts, and even flags if you have any source filters applied at that level.
* **Dashboard and Sheet Mapping:** RapidDox maps every sheet to the dashboard(s) it appears on.
* and much more.

**When RapidDox can come in handy**

I find RapidDox really useful when you need deep **technical documentation**, especially for super complex dashboards. It’s also handy when you need to optimize a workbook because of performance issues. RapidDox can help you analyze what’s going on inside your dashboard, like showing you the number of unused fields or worksheets that might be slowing things down. And it’s a big help when you’ve inherited a dashboard from someone else and have no idea what it’s all about.

**🔍 Tableau Calculations & Lineage Analyser**

[**Tableau Calculations & Lineage Analyser**](https://ashy-bay-071805103.4.azurestaticapps.net/)is a free tool by Ana Rey de Castro that generates a full list of fields from your Tableau dashboard, including their:

* **Data types**
* **Data source names**
* **Calculated field logic**

Beyond this, the tool generates the **lineage**so you can see how all fields are related.

**📸 Scribe**

[Scribe](https://scribehow.com/) is a clever Chrome browser extension that helps you create visual, **step-by-step guides**.

How it works is pretty neat. You just start recording your screen with Scribe, and as you click around and type, Scribe automatically captures screenshots of your actions. It then generates **a how-to guide** with written steps for each click. You can then share these how-to guides with others via links, PDFs, or even embed them elsewhere.

**When Scribe can come in handy**

I find Scribe really handy for showing final dashboard users exactly how to navigate an interface because, even though a well-designed dashboard should ideally be intuitive, sometimes a quick visual user manual like this is just a nice thing to have.

**🤖 Dashboard Documentation Pro**

[Dashboard Documentation Pro](https://chatgpt.com/g/g-6730de0e90048190aa833273d5c7de54-dashboard-documentation-pro-by-adam-mico) by Adam Mico is a specialized GPT that is designed to generate text for your documentation. It can help you write:

* **An introduction** explaining what your dashboard is all about.
* **A description of** the target audience.
* **A list of** key metrics, and even draft their descriptions for you.
* It also gives you design recommendations.

You can use it as a starting point and refine the text as needed.

To use it, you’ll provide the model with details about your dashboard and screenshots of it, and the model then returns all mentioned above.

You can read a bit more about this [here](https://adammico.medium.com/introducing-dashboard-documentation-pro-by-adam-mico-d0ff14bf9060).

**🧠 Conclusion**

Whether you need a deep dive into the technicalities of your workbook with **RapidDox**, an understanding of your data’s lineage and specific calculations with a **Tableau Calculations & Lineage Analyser**, a straightforward user manual generated by **Scribe**, or help actually writing the descriptive text with **Dashboard Documentation Pro**, there’s a solution out there.

Each of these tools brings a unique superpower to the documentation process, and depending on your specific needs, you might find one perfect, or even a combination of them, to truly simplify keeping your Tableau workbooks clear and understandable for everyone. While comprehensive documentation can normally demand a lot of time, by leveraging these tools, you can get it done much faster and more efficiently, ultimately saving yourself and others a lot of future headaches and confusion.

**💡 Tip**

If I can give you one more tip about documentation, just keep it updated because when it is outdated, no one will actually benefit from anything mentioned above.