

Design a Data Dashboard Final Project

Text Hierarchy and Screenshots

Data Visualization Nanodegree Program

Krishna Nadoor

Introduction

Our first tactical dashboard was a hit, which means we have attracted some attention. Now the full executive team wants a more strategic view of the business.

You need to create a dashboard that allows the team to see:

- Top-level revenue, profit, average profit ratio and units sold
- YoY performance by segment (segment refers to Corporate, Consumer, Home Office)
- Monthly trend of the current year by segment (segment refers to Corporate, Consumer, Home Office)
- View category performance
- Best performing sub-category within each customer segment

The difference between this dashboard and the previous, besides the content, is the emphasis on performance. Your executive audience does not have the time to make all the comparisons themselves. They need you to emphasize the main points of interest they will relay to their team leads for further investigation and discuss among themselves regarding strategy.

Project Overview

In this project, you will incorporate the new skills you have learned around dashboard designed to grab your audience's attention. We will be emphasizing key elements of the dashboard that continue acknowledging the audience's level of graphicacy, conscious management of color to avoid confusion, and our innate ability to identify patterns so those who find your dashboard are drawn to the key points.

Datasets

For this project, I will be using the Superstore dataset to build the KPI dashboard.

Project Steps

Below are steps I followed to complete each component of this project.

I ensured the audience can access the information below:

- Top-level revenue, profit, profit ratio and units sold for 2018
- YoY performance by customer segment (customer segment refers to Corporate, Consumer, Home Office)
- View sub-category performance by the active metric
- Best performing sub-categories within each customer segment for the chosen metric
- Demonstrated a clear use of alignment so users can easily navigate the UI
- Used color to clearly call attention to the marks that matter most
- Created a text hierarchy to further organize the information on the screen in a separate document
- Added information to areas of the screen users may have questions about via tooltips

Tableau Typeface

Dashboard title text

Font	Font Weight	Font Size
Tableau Book	Bold Bold Regular	18pt 9pt

Body text

Typographic Hierarchy
Axis Number – Tableau Book / 9pt / Regular / Dark Grey
Sub-Category names – Tableau Book / 9pt / Regular / Dark Grey
Segment names (Monthly Trend) – Tableau Book / 9pt / Regular / Dark Grey
Segment names (Sub-Category) – Tableau Book / 9pt / Regular / Turquoise
Filters and parameters – Tableau Medium / 10pt / Regular / Dark Grey

BAN text

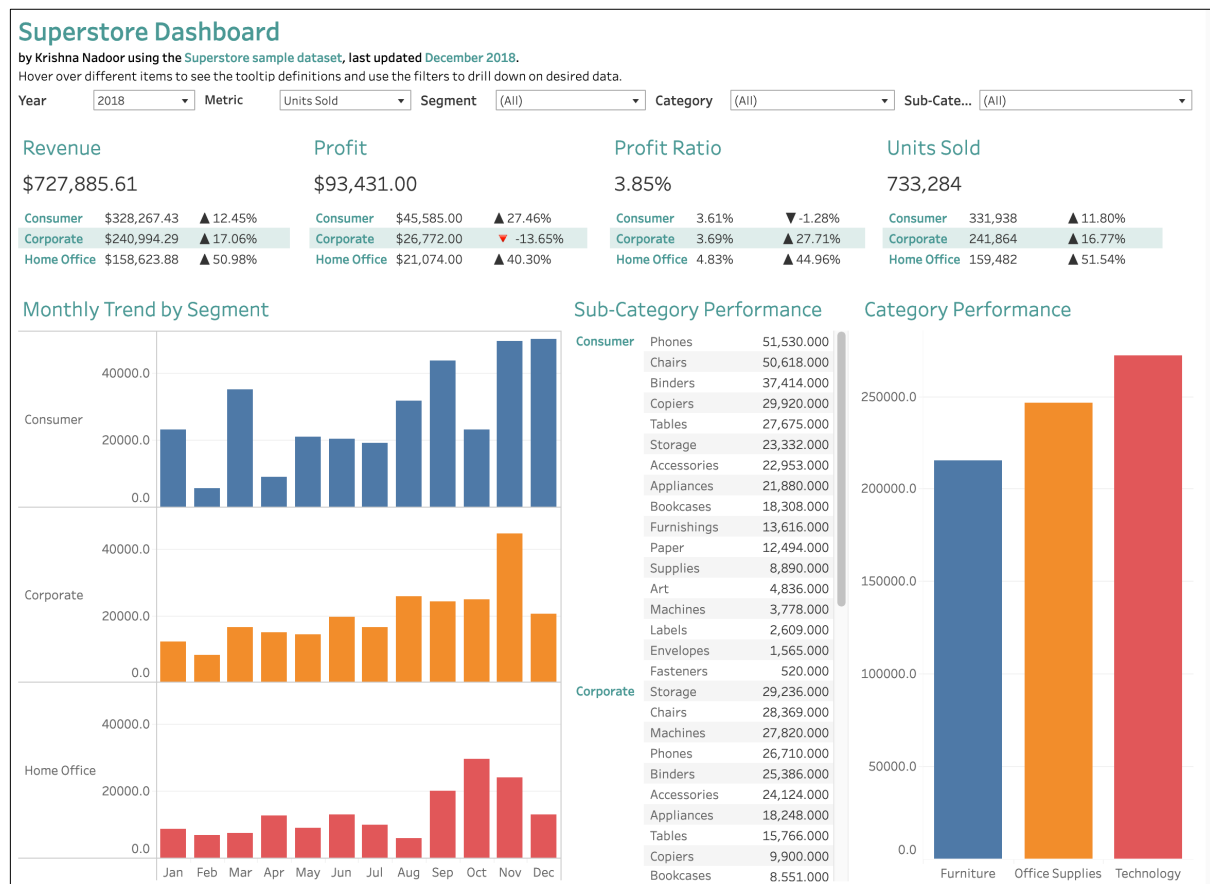
Typographic Hierarchy
BAN Text values – Tableau Book / 14pt / Regular / Dark Grey
BAN Text description – Tableau Book / 9pt / Regular / Dark Grey

Context/instructive text (via tooltips)

Typographic Hierarchy
Tableau Book / 10pt / Regular / Dark Grey

Dashboard Screenshots

The following is a screenshot of the [dashboard](#) with no filters applied for 2018:



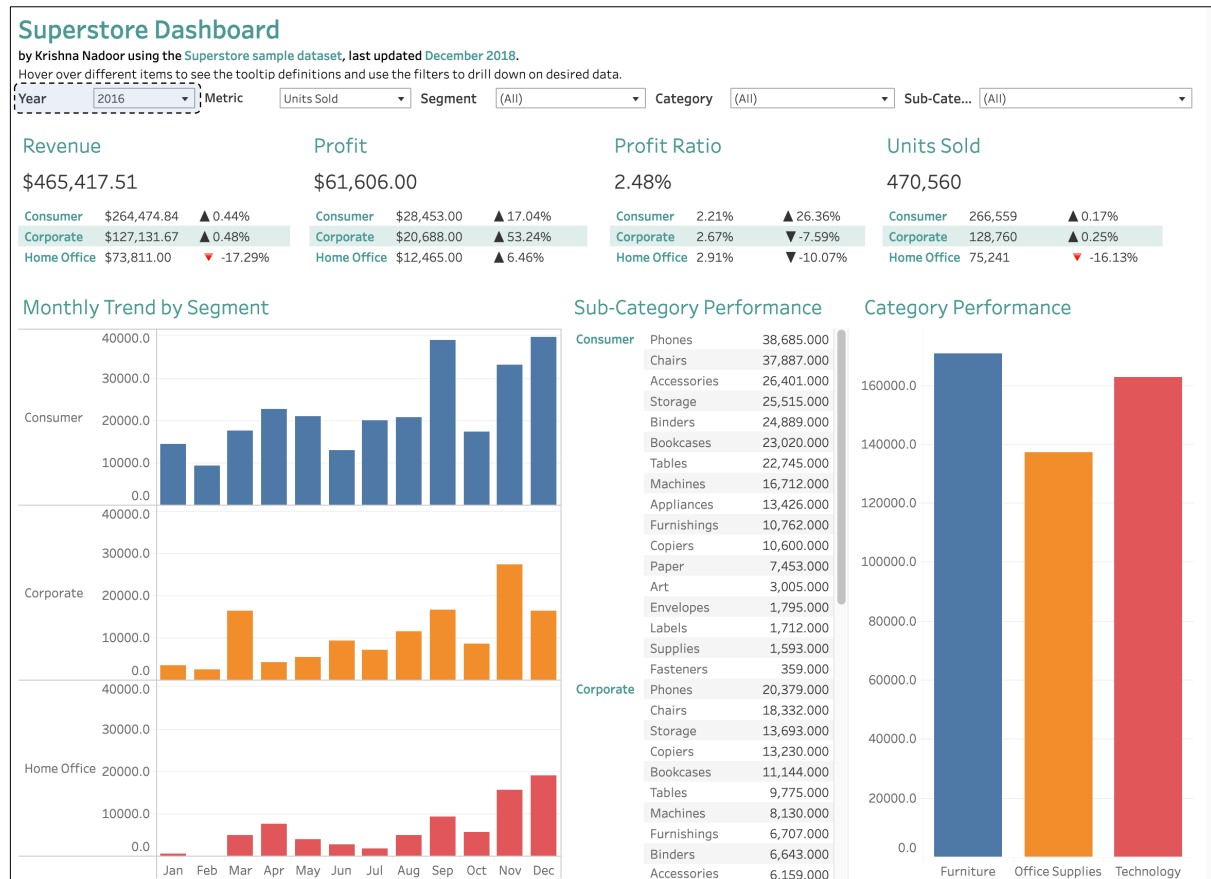
Dashboard link:

https://public.tableau.com/app/profile/krishna.nadoor/viz/SuperstoreDashboard_16434678178740/Dashboard

Over the next few pages, we'll explore how to use the dashboard based on executive team questions.

Time Periods

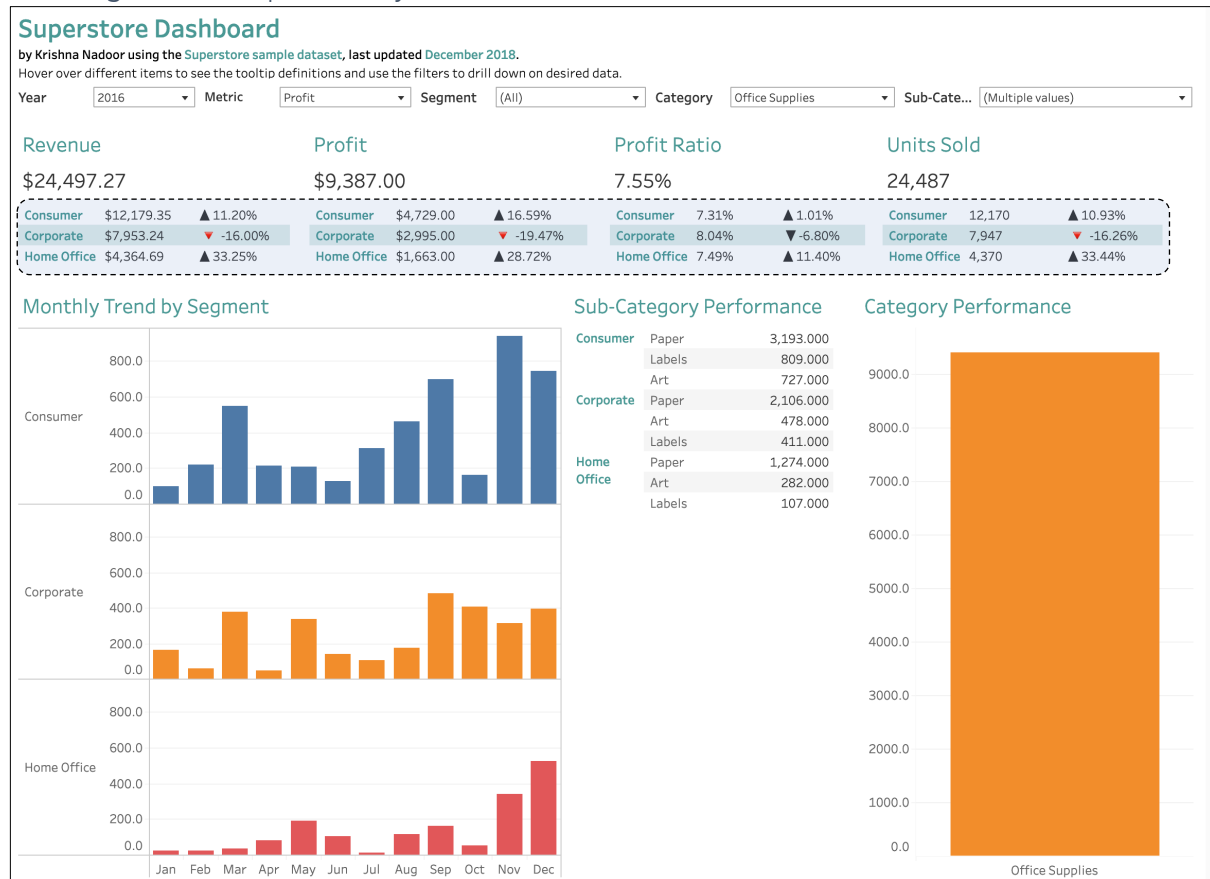
When changing the year, the dashboard components update to reflect the years' worth of data:



YoY Performance KPIs

The YoY performance also updates depending upon changes done to the year of interest, the reporting metric, segment, category, and sub-category.

Take the following example where the metric and sub-category values were changed, notice that the YoY performance updates as well as KPI arrow indicators to reflect the % change over the previous year.



Monthly Trends by Segment, Category and Sub-Category performance

When any of the filters change, the three visualizations on the bottom update accordingly.

Below, we've filtered on the metric **Revenue** and only interested in the **Home Office** segment. Furthermore, within the Home Office segment we are online interested in the revenue for **Furniture** and **Office Supplies**.

We can see our best-selling home office products are Chairs, followed by Paper. The category performance for Office Supplies is lower than that of Furniture and this is reflected in the sub-category performance, with Envelopes, Art and Labels bringing the least revenue.

November was the best performing month in home office, this could be attributed to pre-Xmas holiday sales. Interestingly, January, July and August had the least revenues earned.

