Tableau Dashboard Design Guidelines

Because of sensitive data shown in my dashboards, it's not possible to share them. Therefore, I will share my guidelines for creating a dashboards and Tableau technical features I tend to use. I am considered excellent at creating actionable visualizations and would rate myself a high intermediate technical user of Tableau.

My users are mainly executives and clinician leaders. My guiding principal is to communicate critical information in as short a time making sure that it is actionable, understandable, and intuitive.

Dashboard Guidelines

1. While I want my dashboards to be visually appealing, if there is a choice between attractiveness and information transfer strength, I will always chose the latter.
2. I use meaningful colors:
    a. Green = good
    b. Yellow = moderate
    c. Red/burgundy/orange (depending on context) = bad
    d. Blue/grey = neutral
    e. Black/dark grey = neutral or deaths
    f. Other colors as needed
    g. Deep saturation -> items demanding more attention, such as current year results
    h. Low saturation -> items requiring less attention, such as prior year
3. I avoid shading unless it truly helps. I will shade important items, like parameter selections that might not be obvious or notes that convey critical information.
4. Every dashboard has a documentation tab that explains critical elements regarding data processing, calculations if not obvious, answers to questions users might be expected to ask, as well as contact information. Instructions for getting email notifications when data refreshed are also included, which is important for those few that are not fully automated.
5. Important notes regarding particular data elements are put close to graphics and not just in the documentation tab.
6. I generally limit dashboards to <= 4 visuals to avoid overcrowding or have visuals that are too small for trends to be recognized.
7. As much as possible, calculations are done during the SQL data prep phase & not in Tableau.

Commonly Used Tableau Features

1. Custom actions are used extensively to create interactive dashboards that are good for exploration.
2. Reports often have a trend or reference line to give more meaning to individual data points.
3. Sets are often used to group less meaningful data and reduce clutter.
4. Parameters are often included, sometimes to allow for one-to-many type filtering not possible with traditional filters.

5. Most dashboards are automated. The couple that are not are processed with a couple mouse clicks.
6. Only select users are given full data download capabilities.
7. Some dashboards' data is needed by numerous people in which case an online link in the dashboard to a well-formatted Excel file with a data dictionary is made available.
8. Occasionally level-of-detail calculations are needed. These are challenging but we usually get what we need.
9. I use table calculations occasionally, including once to calculate a 7 day rolling average.
10. My users want lots of filters, so I often hide them with a button to display.
11. Groups and hierarchies are fairly often used to aggregate data.
12. A bit surprisingly, I have not yet needed:
    a. Data blending or linked data sources
    b. Drill downs