Crash course on getting more familiar with Tableau.

Tableau 102 Review

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Agenda

- Live demo using LinkedIn salary data set
  - Heat map
  - Tree map
  - Bubble chart
- Building dashboards
  - Dashboard sizing
  - Dashboard objects
    - Containers, text boxes, images, web pages, and blank boxes
    - Tiled vs. floating
  - Layout
    - Borders, backgrounds, paddings
- Live demo using Kakazu's finances data set *(STAR Sample 5 - Personal Banking Dashboard)*
- (Optional) Trusting the Process
- (Optional) Dashboard best practices
- (Optional) Additional Design Principles

LinkedIn salary data set

Heat map

Display average total salaries across the US using a heat map.

- Visual fits the entire screen.
- Give it some color.

Tree map

Display top 10 employers paying the highest median total salaries using a tree map.

- Visual fits the entire screen.
- Give it some color.
- Label the employers and median total salaries.

Bubble chart

Display average total salary by size and average job satisfaction by color of job groups using a bubble chart.

- Visual fits the entire screen.
- Give it some color.
- Label the job groups, average total salary, and average job satisfaction.

STAR Sample 5 - Personal Banking Dashboard

Craft core charts and vizzes

- Monthly Income vs. Expense Over Time
  - Side-by-Side Bar Chart
  - Visualize income and expenses by month to help users compare cash flow patterns.
- Income Sources
  - Pie Chart
  - Show the distribution of income sources to highlight where funds are coming from.
- Expense Categories
  - Pie Chart
  - Display spending categories to reveal how expenses are distributed.

Assemble the dashboard and highlight key metrics

- Add BANs (Big Ass Numbers) to highlight key financial metrics:
  - Total Income, Total Expenses, Net Savings
- Use dashboard containers to arrange the charts into a clean, organized layout that presents insights clearly.
- Include titles, labels, and tooltips to enhance clarity and ensure a user-friendly experience.

Trusting the Process

When you first start a new project, your visuals are not going to look polished, and **that's okay**. **Don't waste time early on making every individual component look perfect.**

Your goals at the beginning of the project should be:

- Explore the data
- Make sure there are no glaring inaccuracies or other data issues
- Put different variables together and see what insights you uncover
- Experiment with different visualizations to find what best conveys these insights
- Brainstorm how it could all fit together to tell a cohesive story

... NOT aesthetics. While important, this comes later on in the process once you know the story you want to tell, have a firmer vision of the final product, and created several individual components.

Ask yourself: **Is there a compelling reason to include this (visual, feature, etc.)?** *If not, keep it out.*

Dashboard best practices

Understand the context

Choose an appropriate visual display

Eliminate clutter

Focus attention where you want it

Think like a designer

Dashboard best practices

Have a solid understanding of what you want to do before you start creating content.

Choose an appropriate visual display

Eliminate clutter

Focus attention where you want it

Think like a designer

Dashboard best practices

Understand the context

In many cases, there isn't a single correct visual display; rather, often there are different types of visuals that could meet a given need. What do you need your audience to know? Then choose a visual display that will enable you to make this clear.

Eliminate clutter

Focus attention where you want it

Think like a designer

Dashboard best practices

Understand the context

Choose an appropriate visual display

Any time you put information in front of your audience, you are creating cognitive load and asking them to use their brain power to process that information. Visual clutter creates excessive cognitive load that can hinder the transmission of our message. Leverage alignment of elements and maintain white space to help make the interpretation of your visuals a more comfortable experience for your audience. Use contrast strategically.

Focus attention where you want it

Think like a designer

Dashboard best practices

Understand the context

Choose an appropriate visual display

Eliminate clutter

Leverage preattentive attributes like size, color, and position on page to signal what's important. Use these strategic attributes to draw attention to where you want your audience through the visual in the way you want.

Think like a designer

Dashboard best practices

Understand the context

Choose an appropriate visual display

Eliminate clutter

Focus attention where you want it

Offer your audience visual affordances as cues for how to interact with your communication: highlight the important stuff, eliminate distractions, and create a visual hierarchy of information. Make your designs accessible by not overcomplicating and by leveraging text to label and explain. Increase your audience's tolerance of design issues by making your visuals aesthetically pleasing.

Additional Design Principles

Reduce the Noise

Make it easy for the user

Prioritize Decisions & Insights

Build dashboards with actionable decisions in mind

Reduce Overhead

When possible, set it and forget it

Reduce the Noise

- Compartmentalize information logically
  - Create logical sections/groups
- Apply a minimalistic design
  - Choose colors intentionally
  - Get rid of unnecessary elements and chart junk
    - Less is more when it comes to dashboards. You don’t want to overwhelm viewers with dozens of visualizations in one view.
- Pay attention to the details

Prioritize Decisions & Insights

- Keep it simple
  - Call out key metrics for impact
  - Only include what’s important and new
  - Give it breathing room
- Use the right chart type AND include variety
- Add interactive features for additional information gain
  - Add filters for user exploration
  - Provide tooltips for more information

Reduce Overhead

- Leverage Tableau Server to auto-refresh
  - With Tableau Server, you can schedule Prep flows to automatically refresh on a set cadence, and then connect the output to your Desktop dashboards. This will keep your dashboards always up-to-date with minimal overhead from you!

That’s not all to Tableau!

- Adding and using **Custom shapes and color palettes**
- Creating and using **Parameters**
- Creating and using **Advanced calculated fields**
- Using **Dynamic zone visibility and Containers**
- Creating and using **Dashboard actions**
- Integrating **R/Python**
- Creating **More visualizations**
- Applying **Dashboard best practices**
- Creating **Tableau Prep** flows and publishing to **Tableau Server or Tableau Cloud**
- Obtaining **Certifications**

Aaand that's Tableau 102!