

Tableau Dashboard Design Elements

A comprehensive overview of Tableau's key design components and visualization features for creating effective dashboards and reports.

Dashboard Layout Options

Pages

Separate dashboard views that users can navigate between, allowing for organization of related visualizations.

Columns

Vertical layout divisions that organize visualizations side by side, represented by the symbol "≡".

Rows

Horizontal layout divisions that stack visualizations, allowing for organized presentation of data.

Filtering Capabilities

Interactive Filters

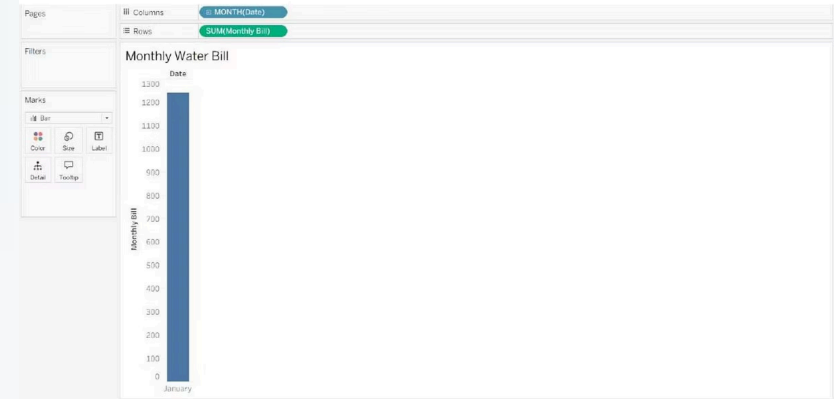
Allow users to dynamically refine the data displayed in visualizations, enhancing exploration capabilities.

Filter Types

Include categorical, numerical, date, and hierarchical filters to provide precise control over data views.

Filter Scope

Can be applied to individual worksheets or across the entire dashboard for consistent data presentation.

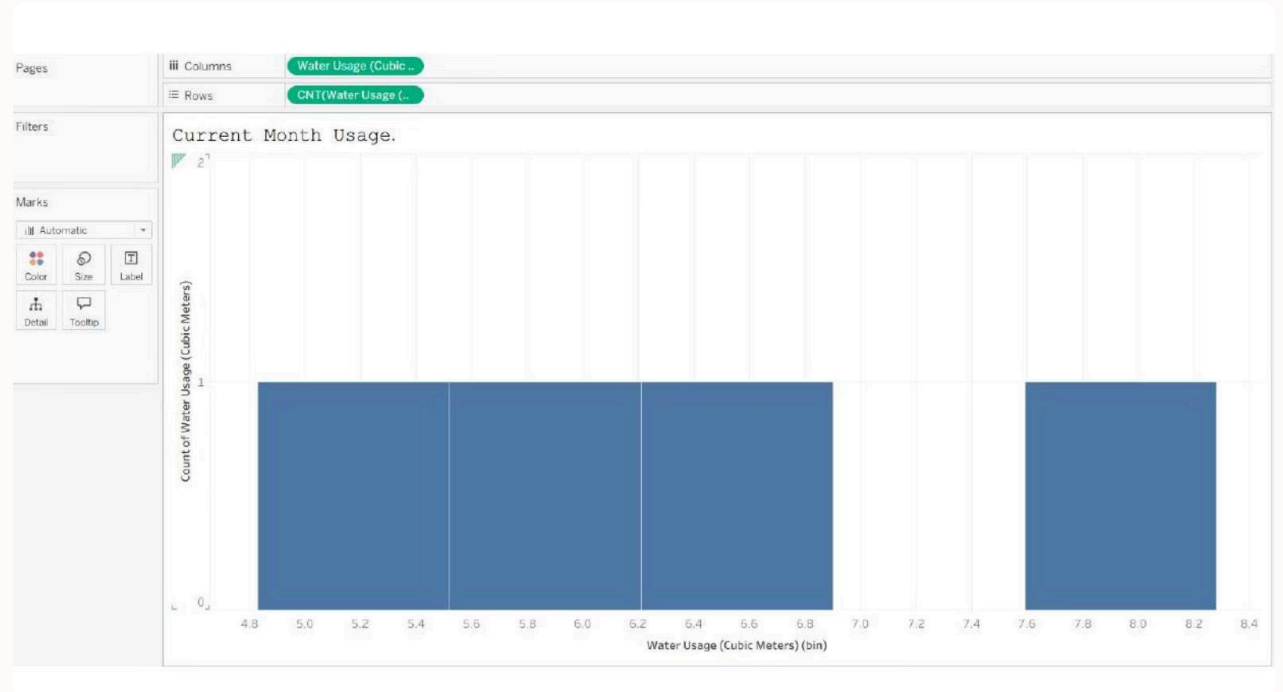


Metrics Display

Average Monthly Bill

310.0

Key metrics can be prominently displayed as large numbers to highlight important values at a glance.



Metrics can be formatted with different sizes, colors, and styles to emphasize their importance in the dashboard hierarchy.



Marks Customization

Automatic

Tableau intelligently selects the best mark type based on your data structure.

Color

Apply color to marks to represent dimensions or measures, enhancing data interpretation.

Size

Vary the size of marks to represent quantitative values, creating visual hierarchy.

Text and Detail Controls

Text

Add labels and annotations to provide context and explanation for your visualizations.

Represented by the symbol "T" in Tableau's interface.

Detail

Add fields to the Detail shelf to include more information without changing the visual appearance.

Creates more granular data points without affecting the visualization's appearance.



Tooltip Functionality

Interactive Information

Tooltips appear when users hover over data points, providing additional context and details.

Customizable Content

Can include multiple fields, calculations, and even visualizations for rich information display.

Example: AVG(Monthly B.)

Shows how tooltips can display calculations like averages of key metrics when hovering over data points.





Dashboard Interactivity

Tableau dashboards offer rich interactivity options that allow users to explore data dynamically:

- Click-to-filter functionality
- Hover actions for additional information
- Parameter controls for user input
- Highlight actions across visualizations
- URL actions for external links
- Set actions for complex filtering

Mathematical Expressions

Fractions

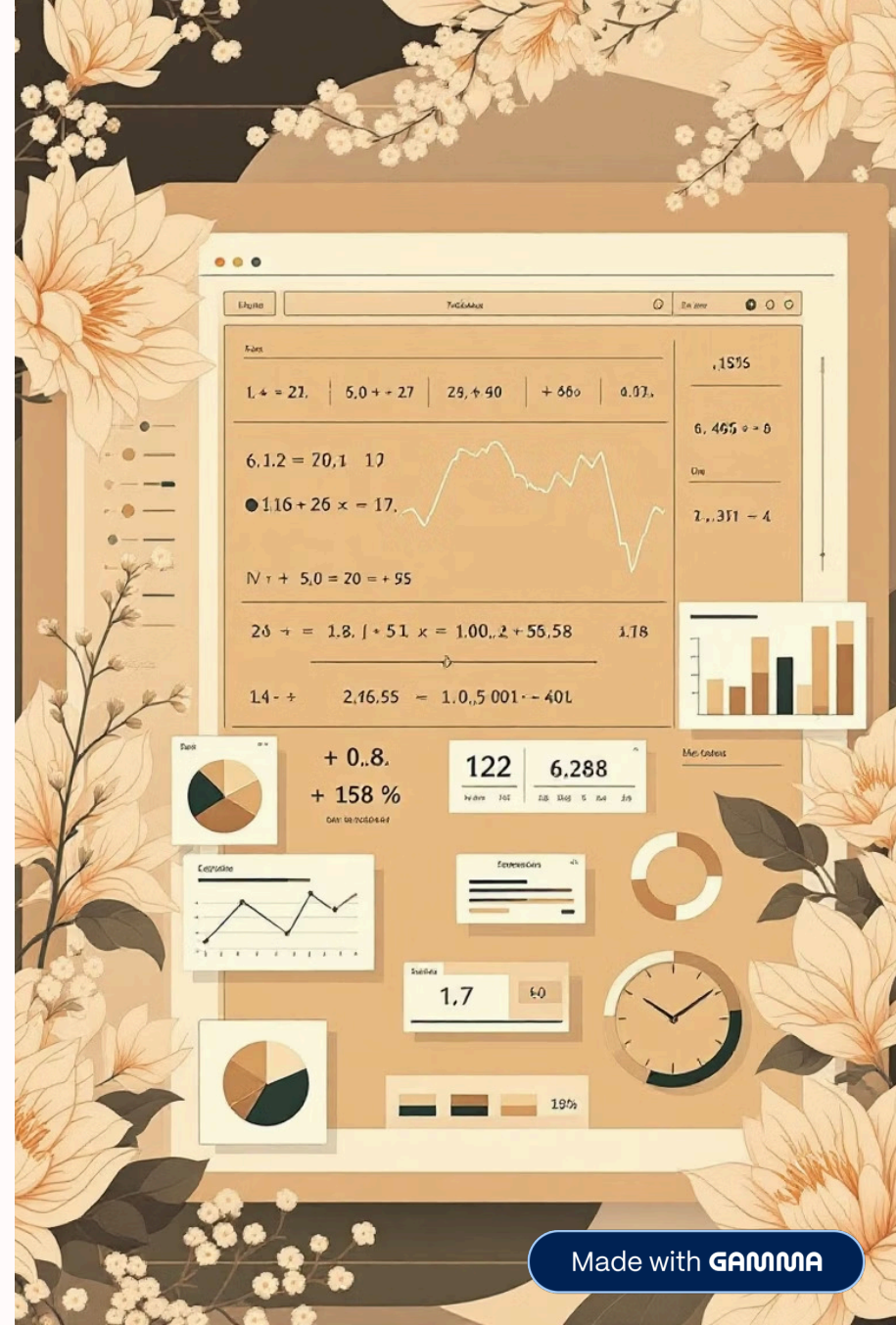
Tableau supports mathematical notation like fractions: $\frac{2}{k+1}$

Vectors

Vector notation can be used in calculations: $\overline{\mathbf{v}}$

Ratios

Display ratios and other mathematical expressions: $\frac{0.0}{0.0}$



Best Practices for Tableau Dashboards



Define Purpose

Clearly identify the dashboard's objective and target audience before designing.



Organize Layout

Use pages, columns, and rows to create a logical flow of information.



Add Interactivity

Implement filters and tooltips to enhance user exploration capabilities.



Test Usability

Ensure the dashboard is intuitive and performs well with actual data.

Following these best practices will help you create effective, user-friendly Tableau dashboards that communicate insights clearly.