14.4.3

Add Worksheets to the Citi Bike Dashboard

Now that you've explored some best practices for Tableau dashboards, it's time to build out the dashboard you'll present to investors.

As we begin to build our dashboard, consider our main objective: we want to show investors the most important relevant data so that they will support the Des Moines bike-sharing business.

We'll create a sample dashboard to understand the overall process. Once you feel comfortable adding worksheets, feel free to add as many as you like. Also, while this process requires creativity, keep in mind the goal you are trying to accomplish. Finally, remember that your dashboard won't look exactly like those of your peers, and that's a good thing. Let's get started!

Add a Title

Start by adding a title to the "NYC Citi Bike" dashboard. We can call it "NYC Citi Bike Dashboard" for now. To do this, click the Floating button.
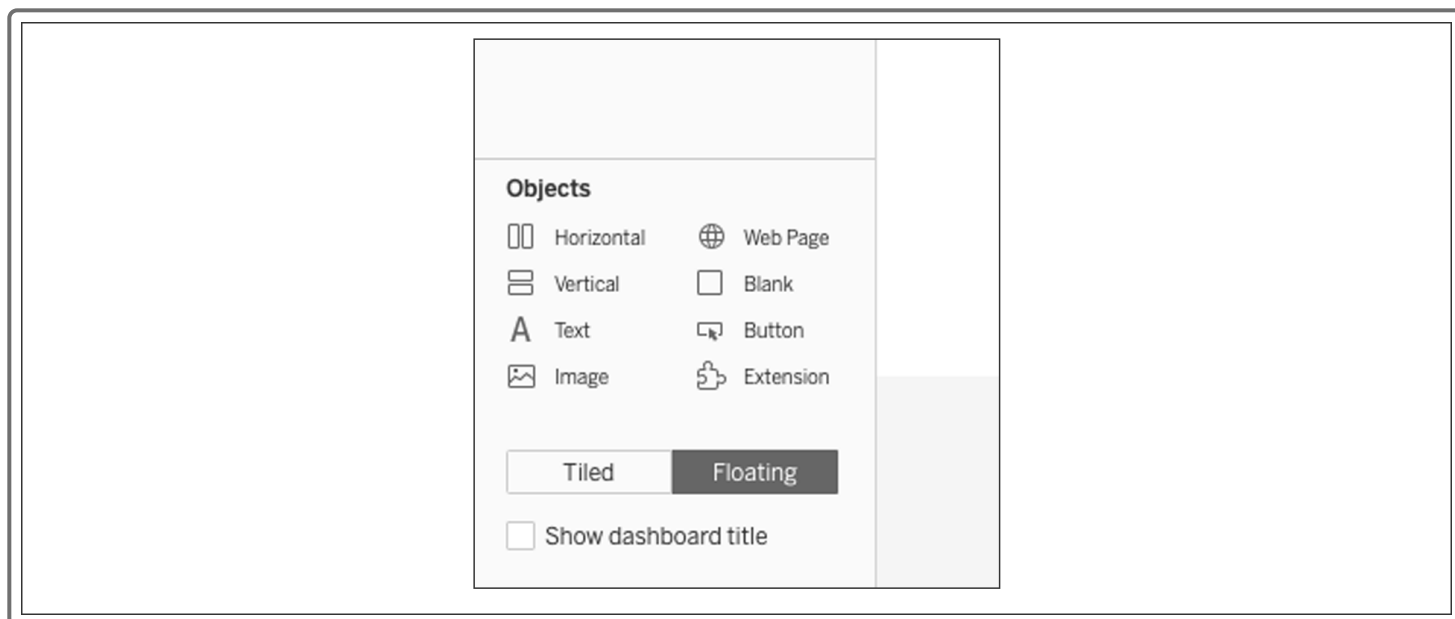
Next, drag the Text object to anywhere on the screen. This will open a window where you can edit the title of the dashboard, as shown in the following image:
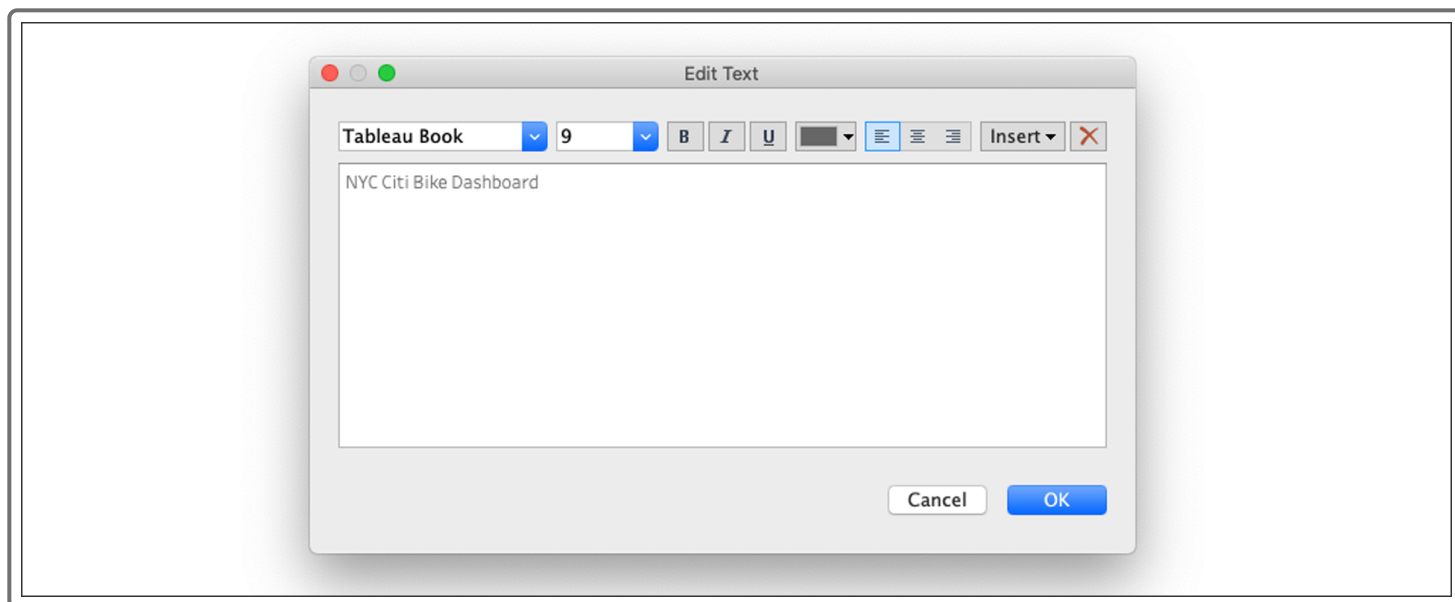
Change the size of the title to 16, and move the title to the top left-side of the page so that it looks like this:
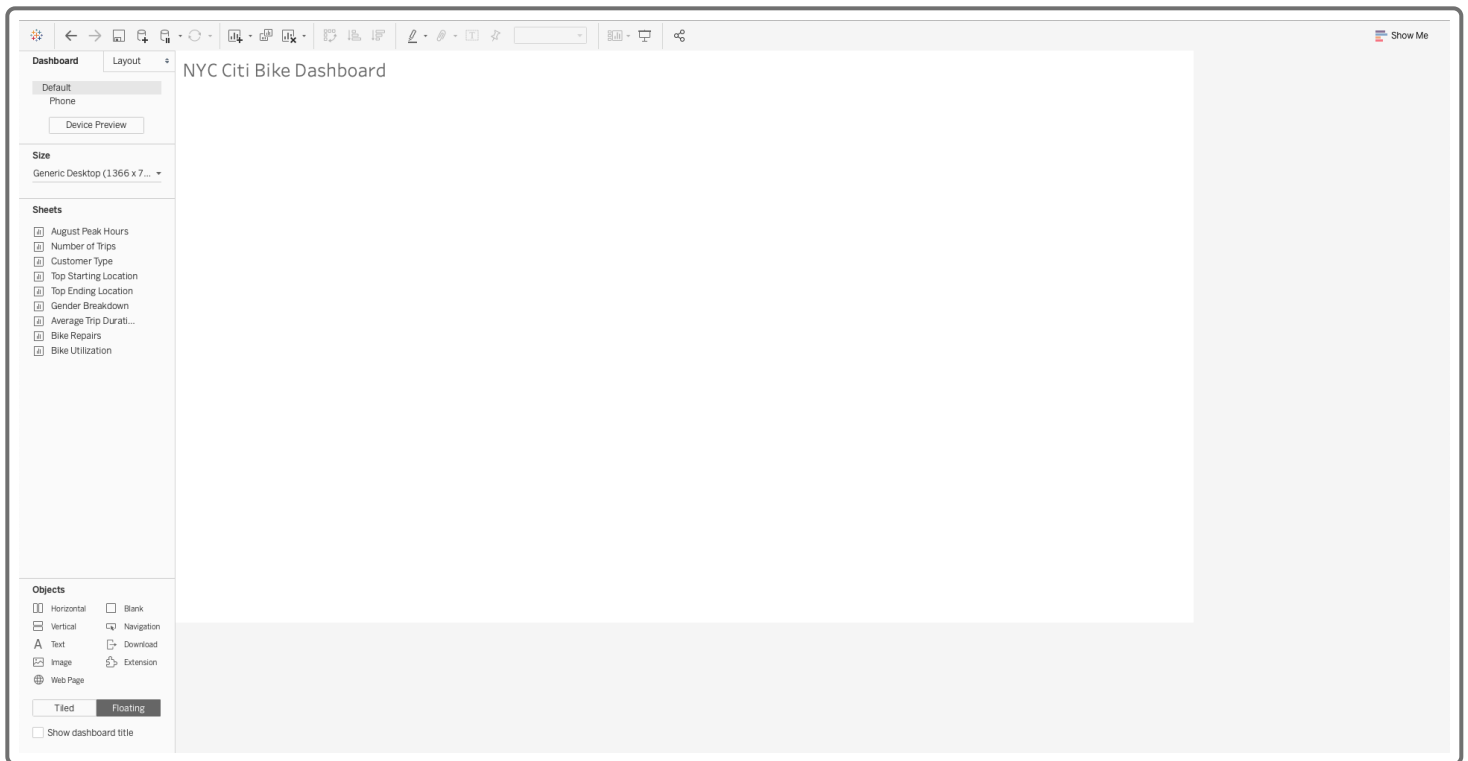
Nice! Now let's look at our worksheet options.

Select Worksheets to Add

Look through the worksheets you've created so far. Which ones are the most relevant for our audience? Consider again the data that we want to present and what our audience is most interested in. Our audience—the investors—want to learn how the Citi Bike program works during the month of August in New York City.

First look at the Average Trip Duration worksheet. This worksheet is a good candidate for the primary spot on our dashboard. You will need to select 'Tiled' before we can move forward. Now, your dashboard should look like this.
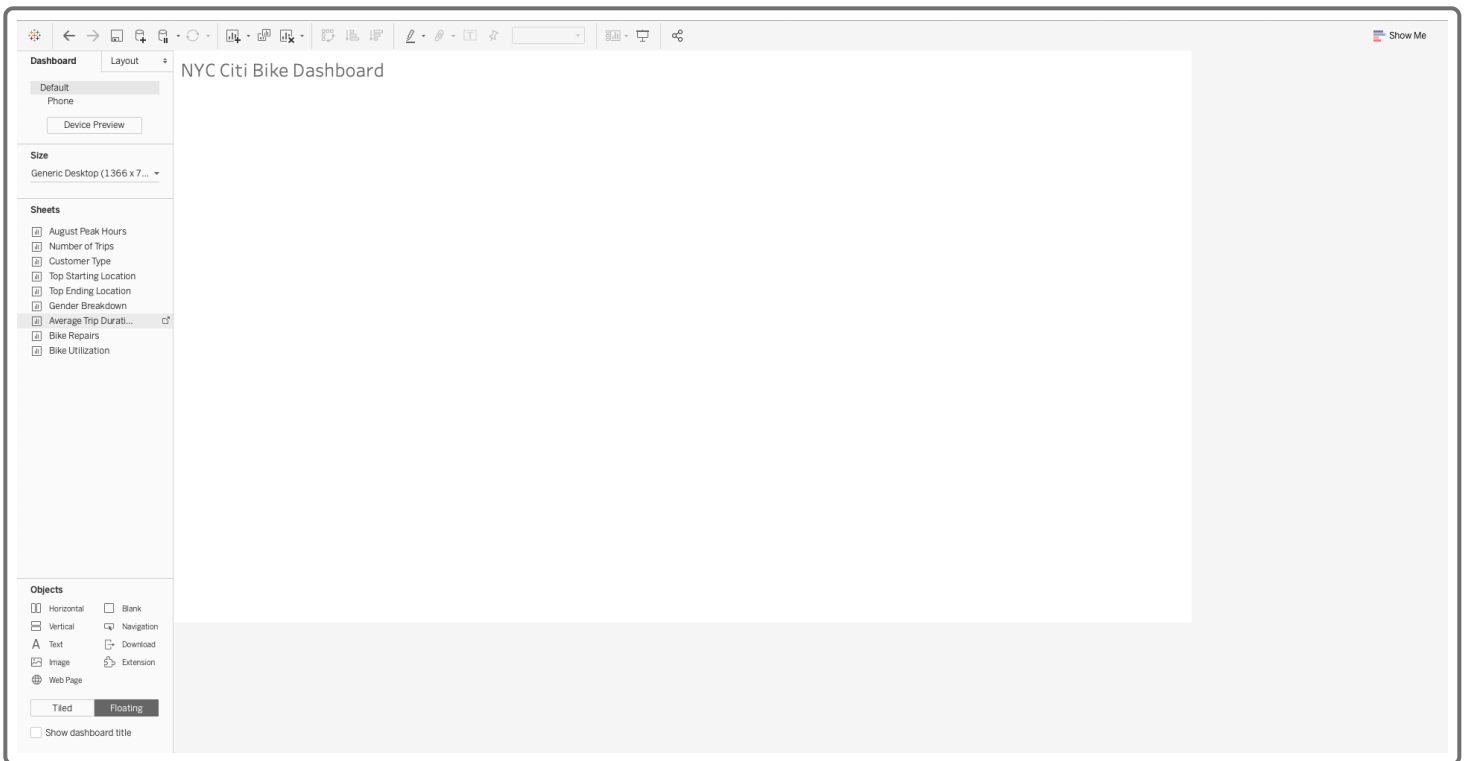
Drag Average Trip Duration worksheet to the dashboard:
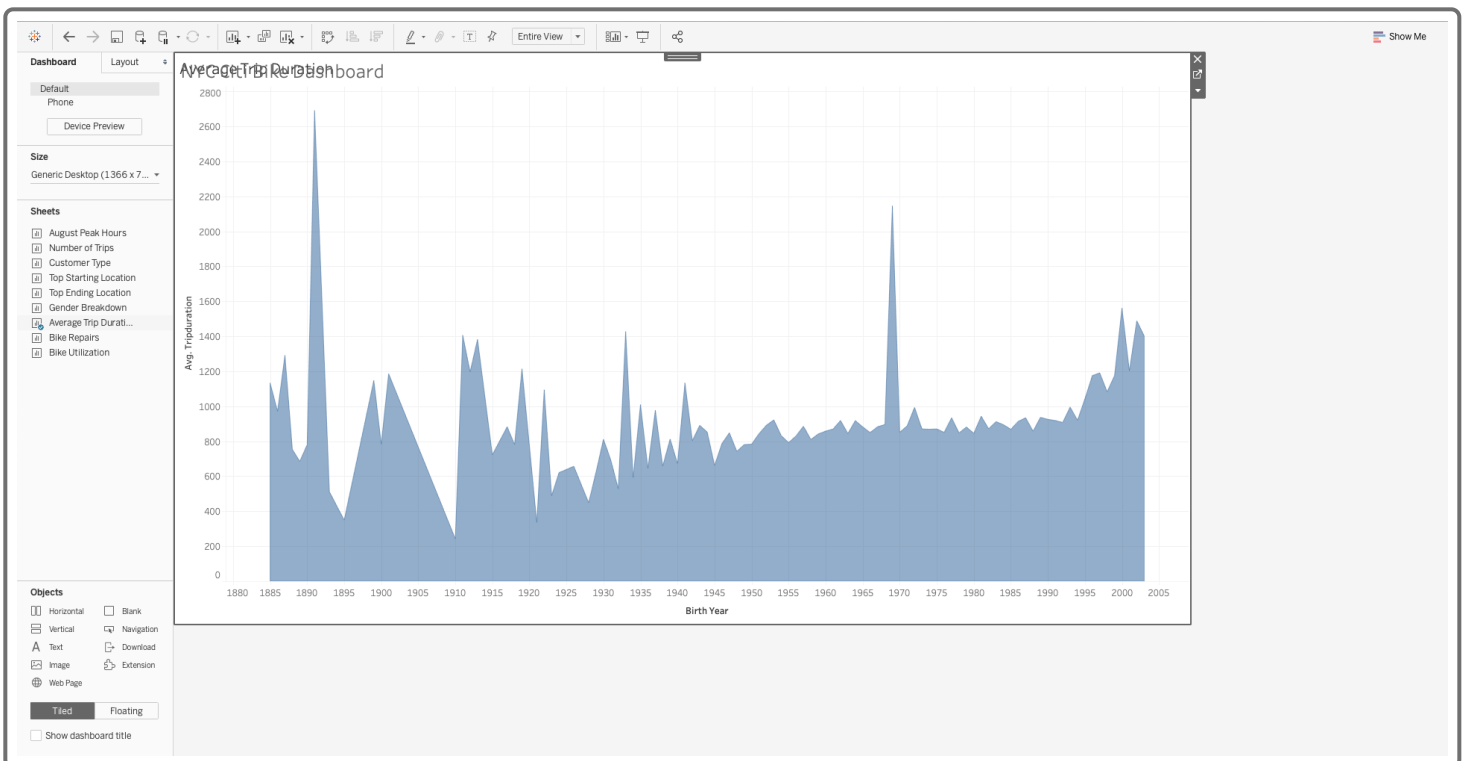
You'll notice that the worksheet is taking up most of the screen, which is not what we want—we want to be able to add other worksheets to the dashboard. To fix this, click the arrow in the top right of the worksheet, and then select

"Floating," as shown in the following image. This will reduce the size of the worksheet so that you can easily adjust and move it around as you see fit. When you are adding a worksheet, you can always just select "Tiled" or Floating" first, then drag your worksheet onto the dashboard.
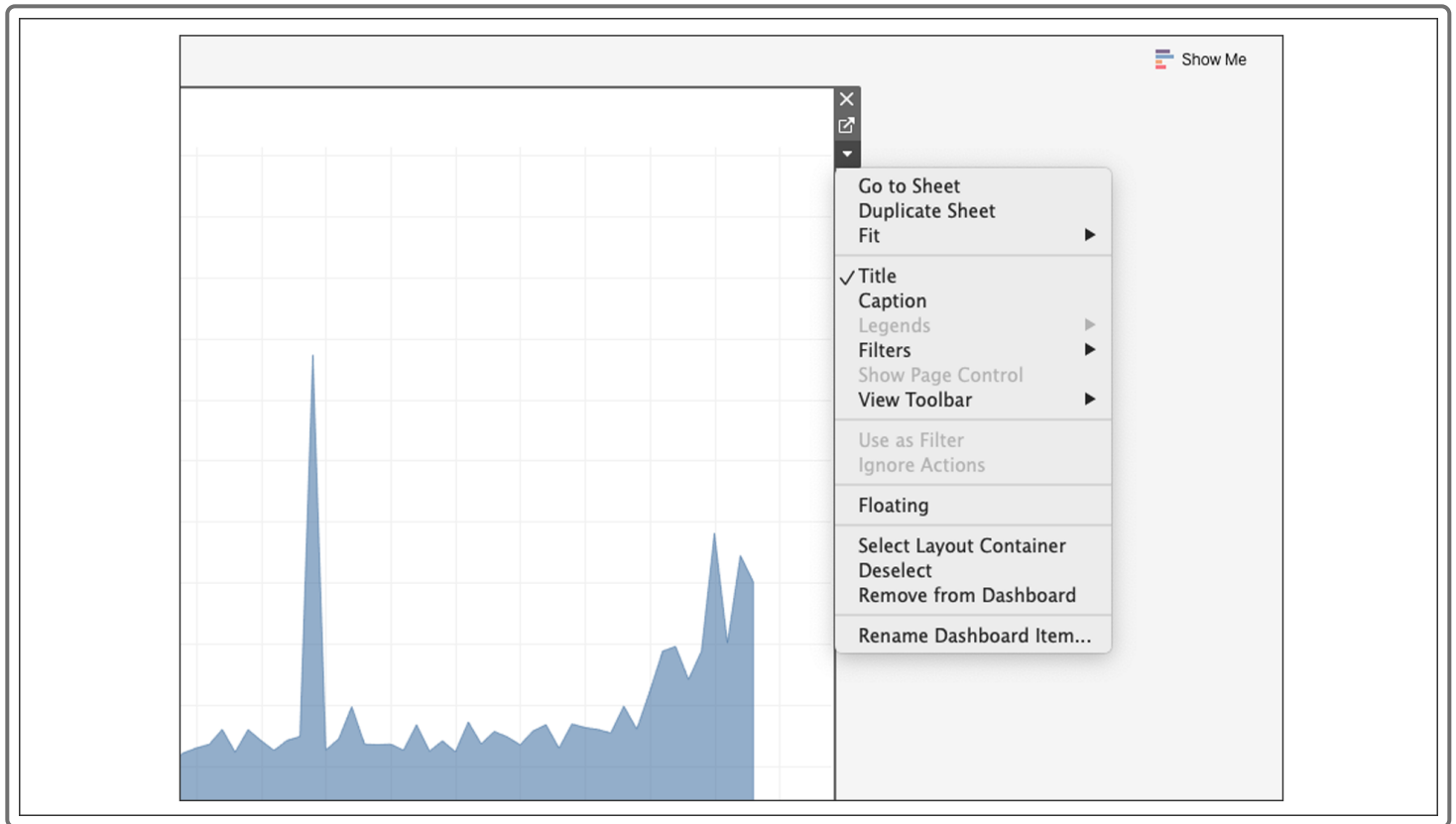

When you change the worksheet to "Floating," here's what you should see:
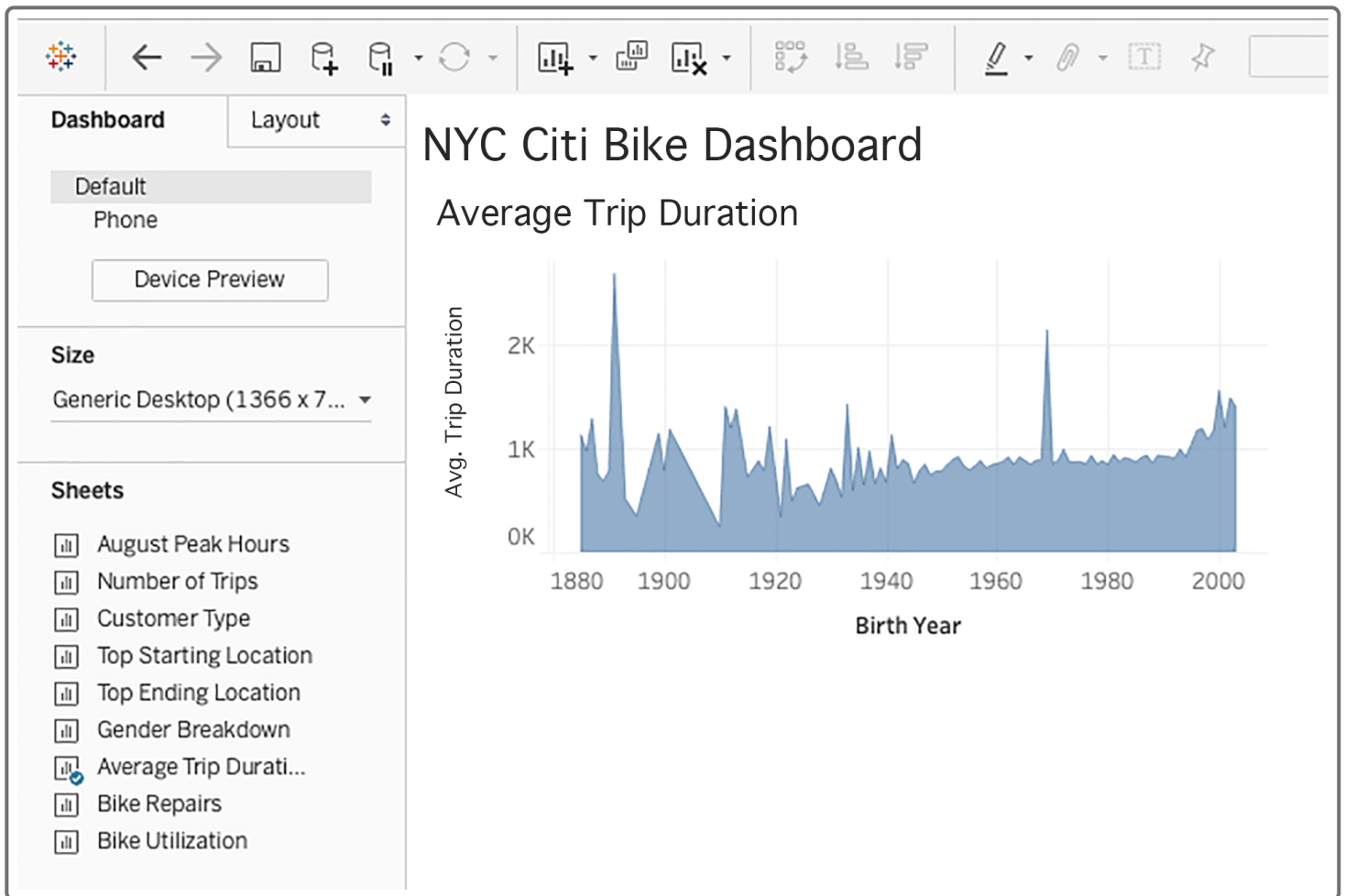
Next, we need to identify the total number of rides during the month of August. We'll use the Number of Trips worksheet for this, so drag the worksheet to your dashboard. Be sure to change it to "floating."

You may notice that the font size is relatively small, so let's change it. Return to the worksheet and click the Text button in the Marks section, and then increase the font size so that it's more readable. See the following image:
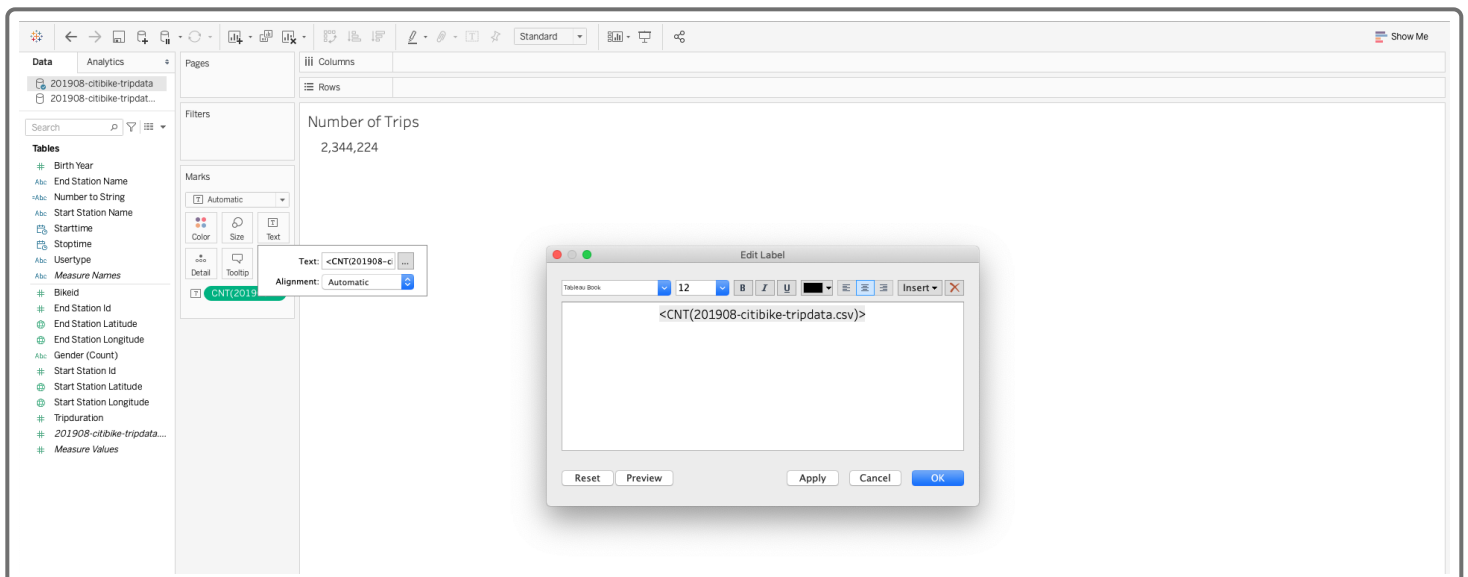
Go back to the dashboard and adjust the size of the worksheet window. Use your best judgment to reposition it.

Next, let's add the Gender Breakdown worksheet by dragging it to the dashboard. Remember to change it to a floating worksheet. Here's what your dashboard should look like now:
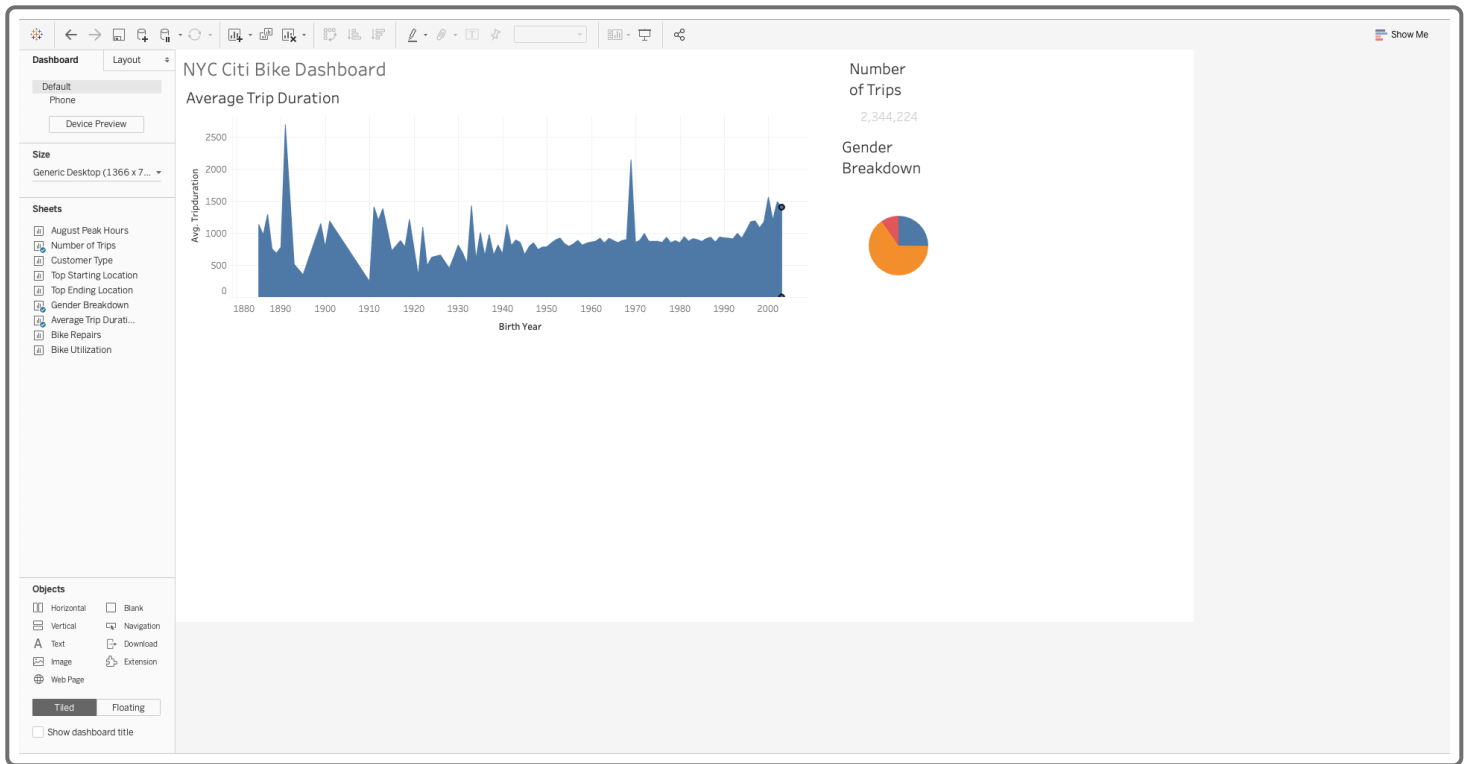

Let's add one more worksheet: Top Starting Location.

NOTE

Remember, the dashboard we're building is just an example. You are free to use different worksheets that you feel better fit your needs, but aim to have three to four worksheets in your dashboard.

Drag the worksheet to your dashboard and position it as you see fit. Here's what your dashboard might look like now, depending on where you placed it.
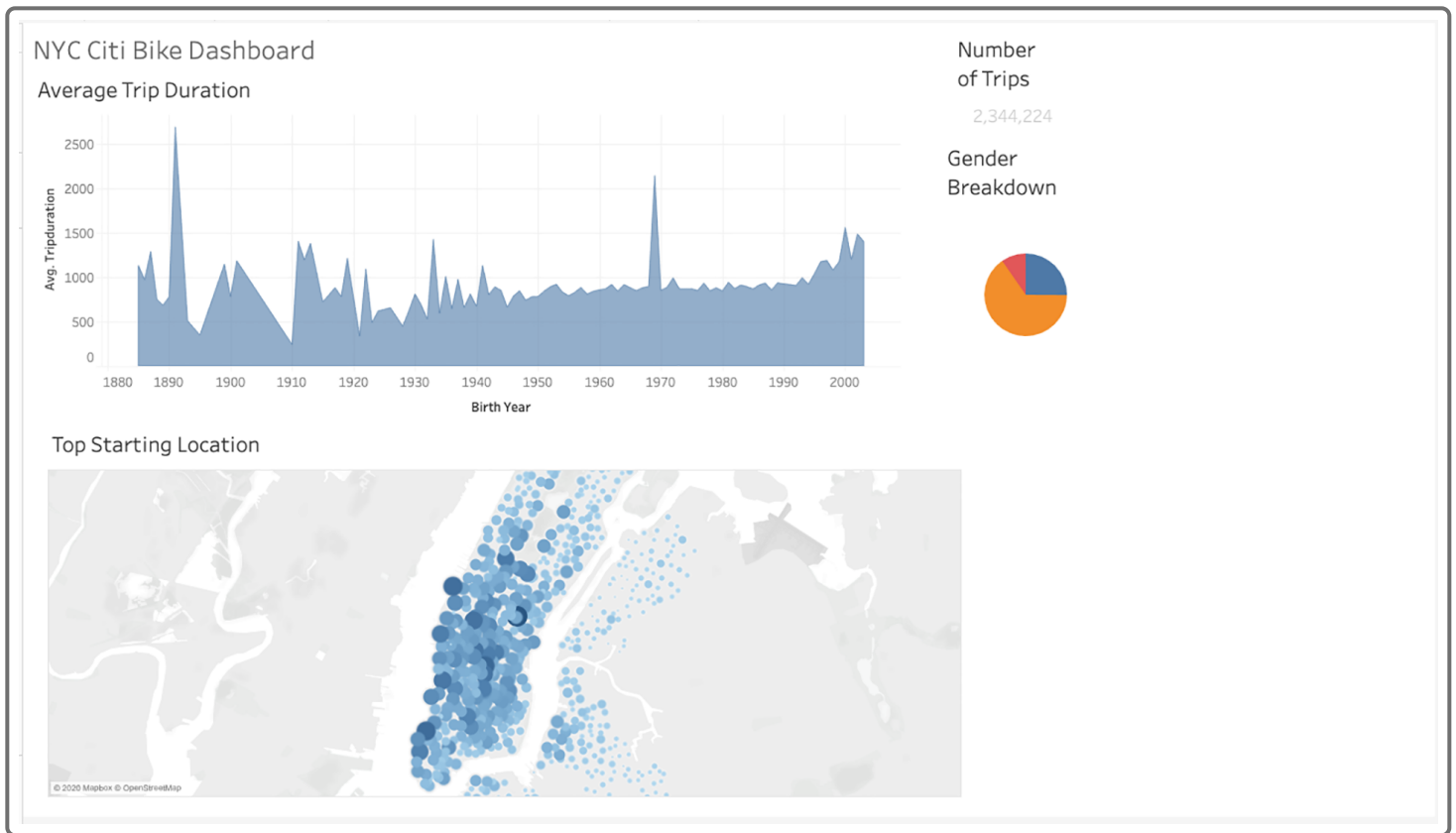
You've created your first dashboard—nice work! There's a lot you can do in a dashboard, so the best way to optimize the design is to keep playing around with the features. Feel free to keep adjusting your dashboard, and remember that yours may not look like your peers' dashboards—and that's okay!

Styling Dashboards

Dashboards not only need to be informative, but also aesthetically pleasing. Most of the cosmetic changes occur in the worksheets, but you should still structure the dashboards so that they are easy to read and understand.

Consider how you could improve the current design and structure of your dashboard right now. Maybe you could add or remove a title of a worksheet, or make one worksheet more prominent than the others. And if you do want to make one worksheet more prominent, consider why.