14.4.2

Dashboard Best Practices

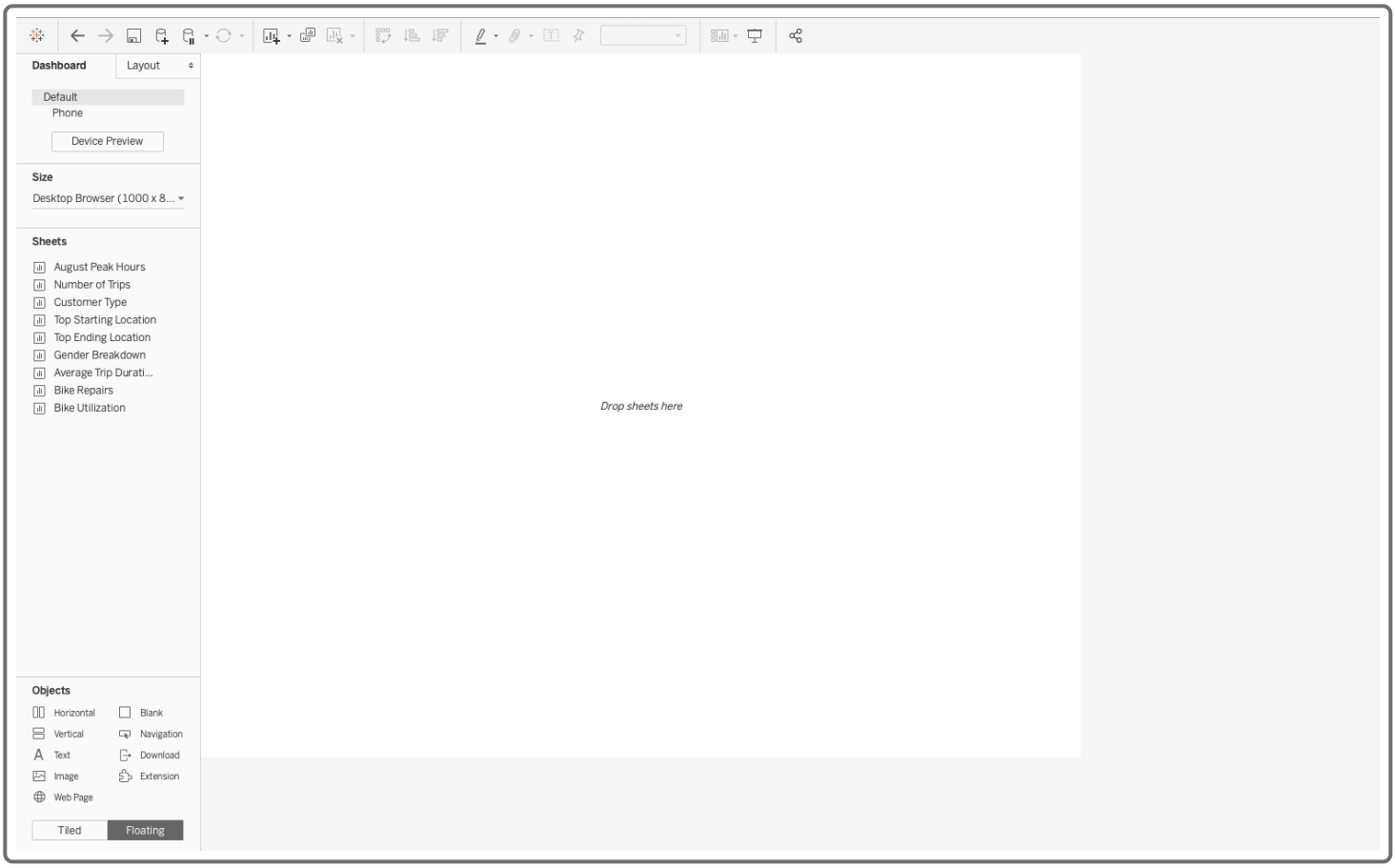
You want to ensure that the work you present to investors is high-quality, in order to instill confidence in your business proposal. It's time to dive into some best practices for creating dashboards in Tableau.

In order to explore dashboard best practices, we need to actually create a dashboard and then design it. Let's create our first dashboard!

Creating a Dashboard

To create a dashboard, click the middle tab (that looks like a grid with a plus sign) at the bottom of your workspace, as shown below:

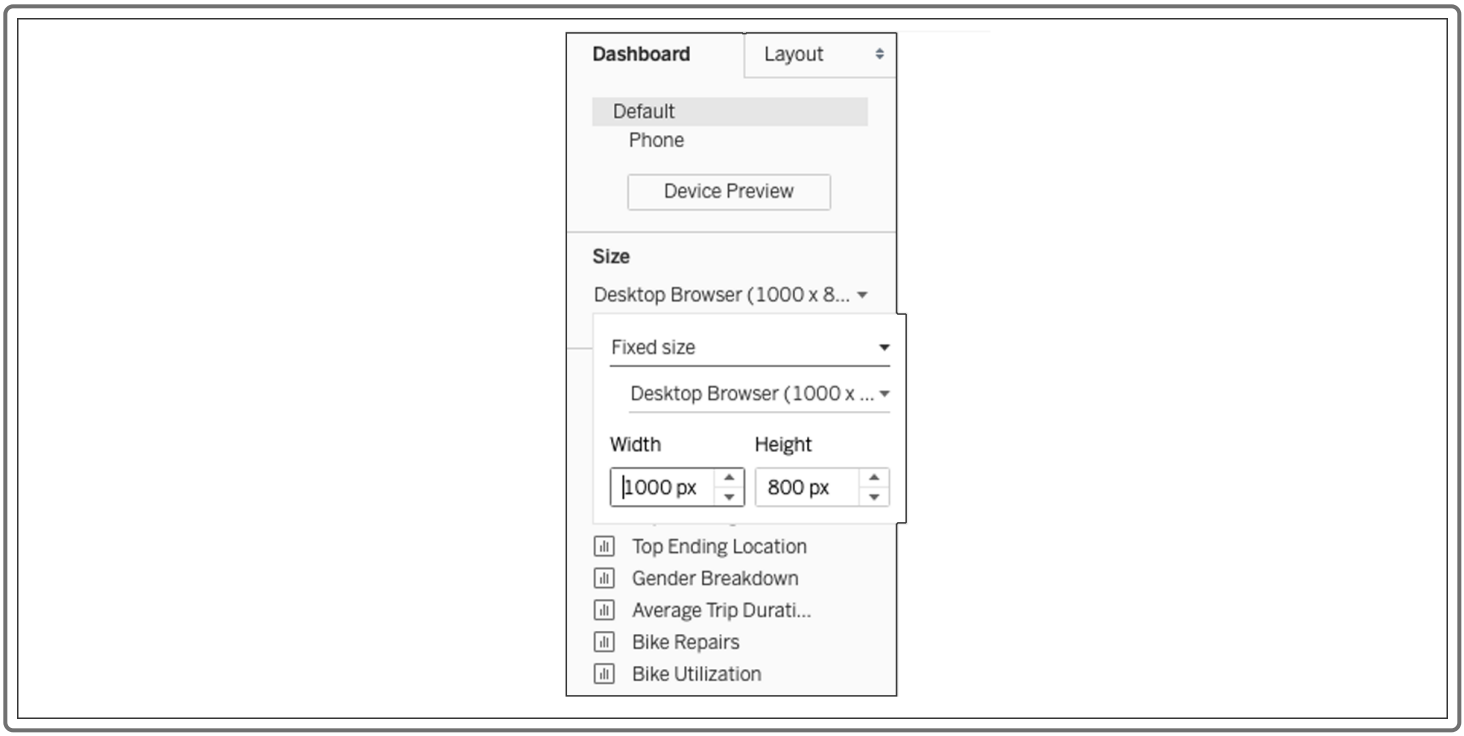
You will see the following screen:



At the moment, your dashboard is likely named something like `Dashboard 1`. Let's rename the dashboard to reflect what we'll be using it for. (Remember, you can rename your dashboard at any time depending on how it changes.) For now we'll call it "NYC Citi Bike." Rename it following the same steps you used to change the titles of worksheets.

Next, decide the size of the dashboard. Depending on the audience and how they'll be viewing the dashboard, you may want to consider changing the size to better fit their devices.

Look in the top left of the dashboard workspace where you should see a dropdown of options, as shown in the following image:



You can either choose a fixed size, automatic, or range. Generally, you'll want to stick with fixed size or automatic. If you don't know what devices your audience will have, it might be better to choose automatic. However, if you know your audience will have about the same computer screen size, you can choose the fixed size.

For simplicity's sake, let's choose the fixed size for a generic browser.

Designing the Dashboard

Dashboards provide a way for us to display all of the worksheets that we've already created, in order to piece together the bigger picture. The main purpose of a dashboard is not necessarily to tell a story, but rather to display data in a readable format.

When designing a dashboard, it's important to prioritize which worksheets go on the dashboard first. Generally, the first worksheet will be the most prominent and show the most informative data, so be sure to get the data you care the most about on the page first.

Let's look at a few key aspects of designing a dashboard: purpose and audience, filtering, highlighting, and objects.

Purpose and Audience

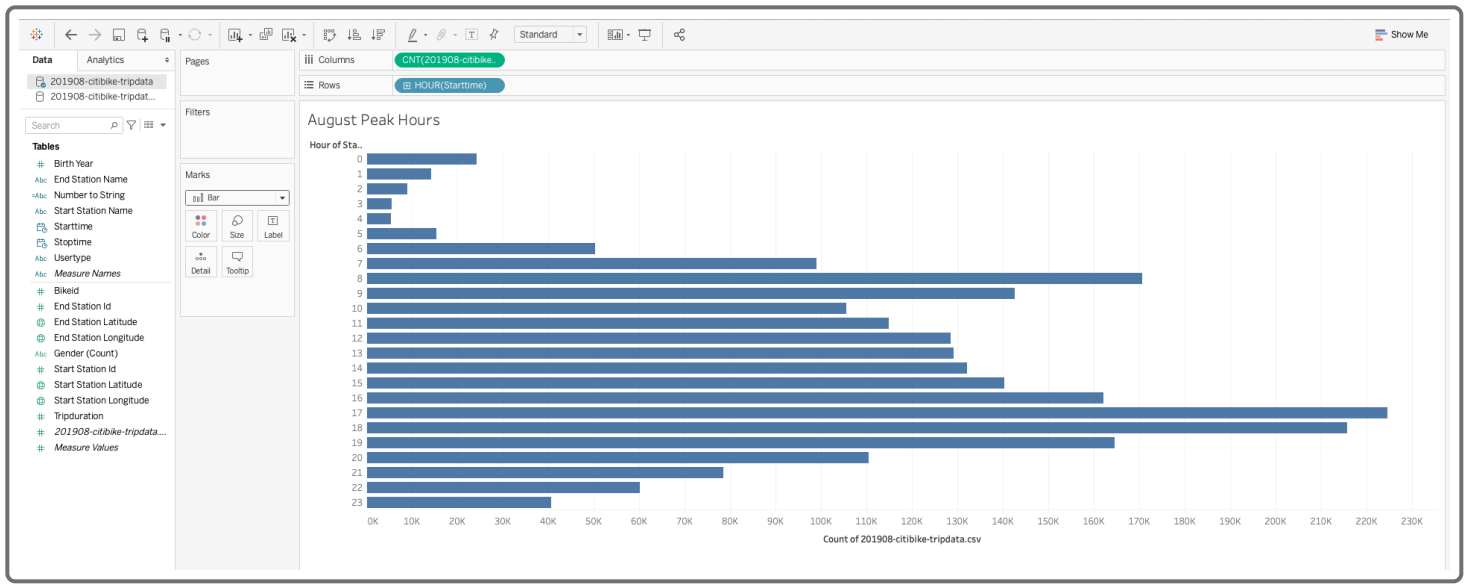
It's important to understand who your audience is when creating a dashboard in order to ensure the data is relevant to them. For example, an executive may be more interested in the specific locations where bikes will be stored, while a developer may want to know specific data about the site, like the location, number of people using it, and more.

Filtering

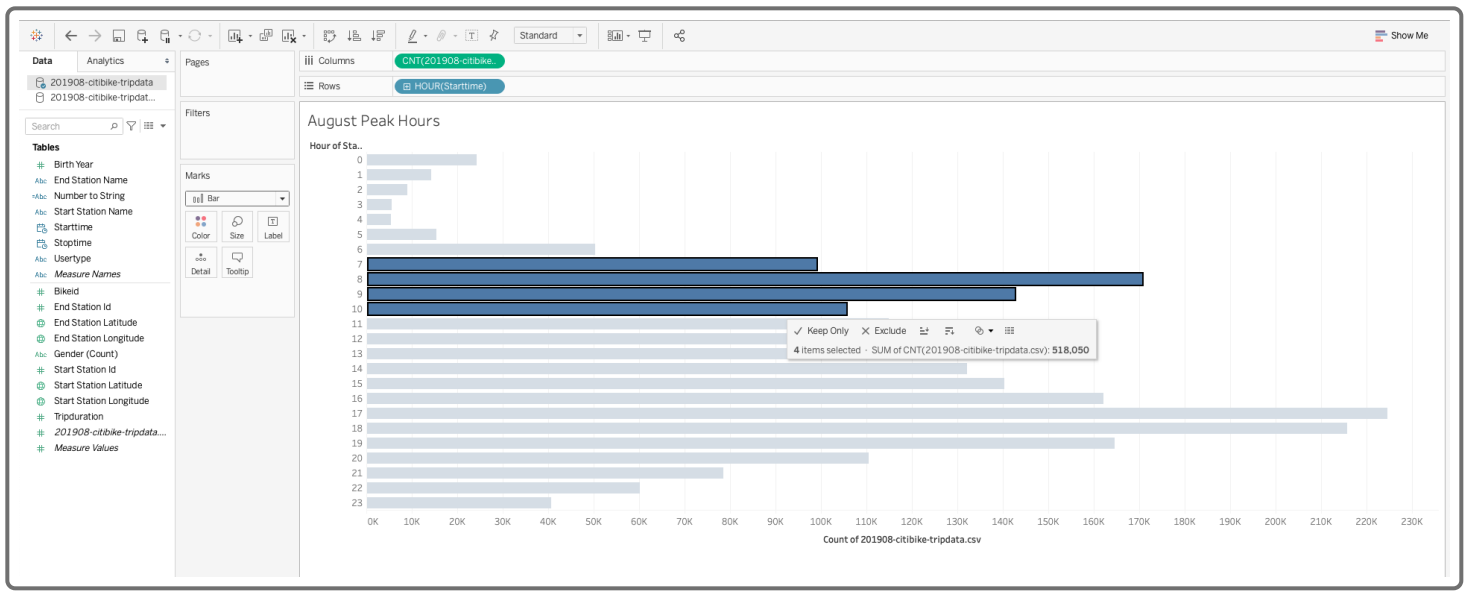
Filtering plays a big role in operability of your dashboard. You can use filters to display certain subsets of data.

Highlighting

The highlighting feature allows you to select subsets of data. To highlight, drag your mouse over a data subset, which will essentially filter out everything but the data you selected. For example, take a look at the August Peak Hours worksheet:



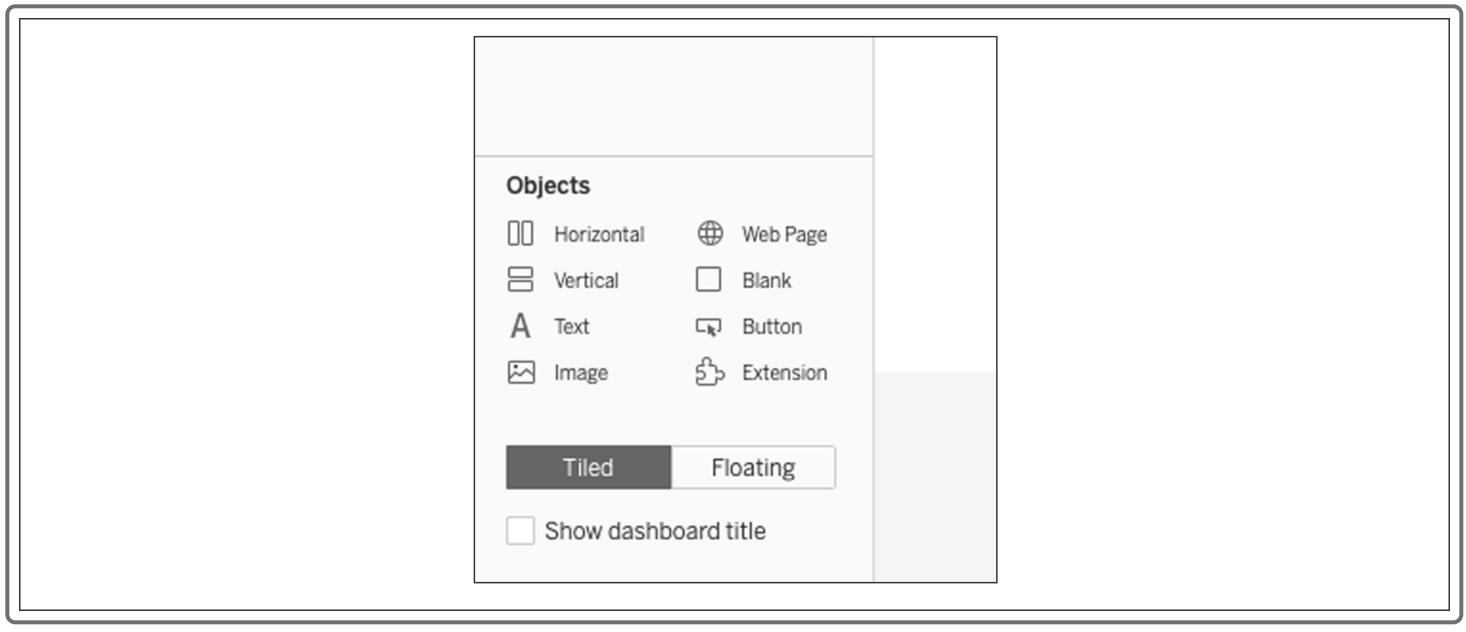
Suppose we want to find the number of rides from 6:00 a.m. to 10:00 a.m. To do this, click the 6:00 a.m. bar and then drag to the 10:00 a.m. bar, as shown in the following image:



If you place your mouse over the hours, you'll see that the sum and the number of items are selected. Select a subset of the hours in the bar chart. Try looking at other dashboards to see the kinds of insights you can get by highlighting subsets of data.

Objects

Most of the time, you'll add worksheets to your dashboard, but occasionally you may need to add links or photos. For example, you may want to add your company logo at the top of a worksheet, or add a link to an external website. You can add both of these items to your dashboard using the objects, which is shown in the following image:



You can drag these objects into your dashboard. You should be aware of two types of objects: tiled objects and floating objects. **Tiled objects** are essentially a structured way to arrange your dashboard. **Floating objects** allow you to change the size of the object and can overlap with other objects. Try both now to see the differences.

Structuring Worksheets in a Dashboard

Worksheets in your dashboard should be structured in an organized, thoughtful way. Include a title for your worksheet, and put the most important data in the top left corner. This is where your eyes will gravitate to first, so make it easy to read.

After adding the most important information in the top left, you can add more information on the right. Most of the time, your audience will read the information in the dashboard from left to right. Then, place the rest of the worksheets around your primary worksheet.

Remember, structuring worksheets is a muscle that you will build over time—but it takes practice!

Ensure Fast Load Times

Something you need to consider is the load time for your data, which can be affected by the data source you're using. For example, if you're using a database from a database server, Tableau will need to query the database. Depending on how much data there is, your dashboard can be slowed down significantly.

For this project, you don't need to worry about optimizing your dashboard. But if you are interested in learning more on this subject, see this article on **tips to make your dashboards more performant (https://www.tableau.com/about/blog/2016/1/5-tips-make-your-dashboards-more-performant-48574)** .