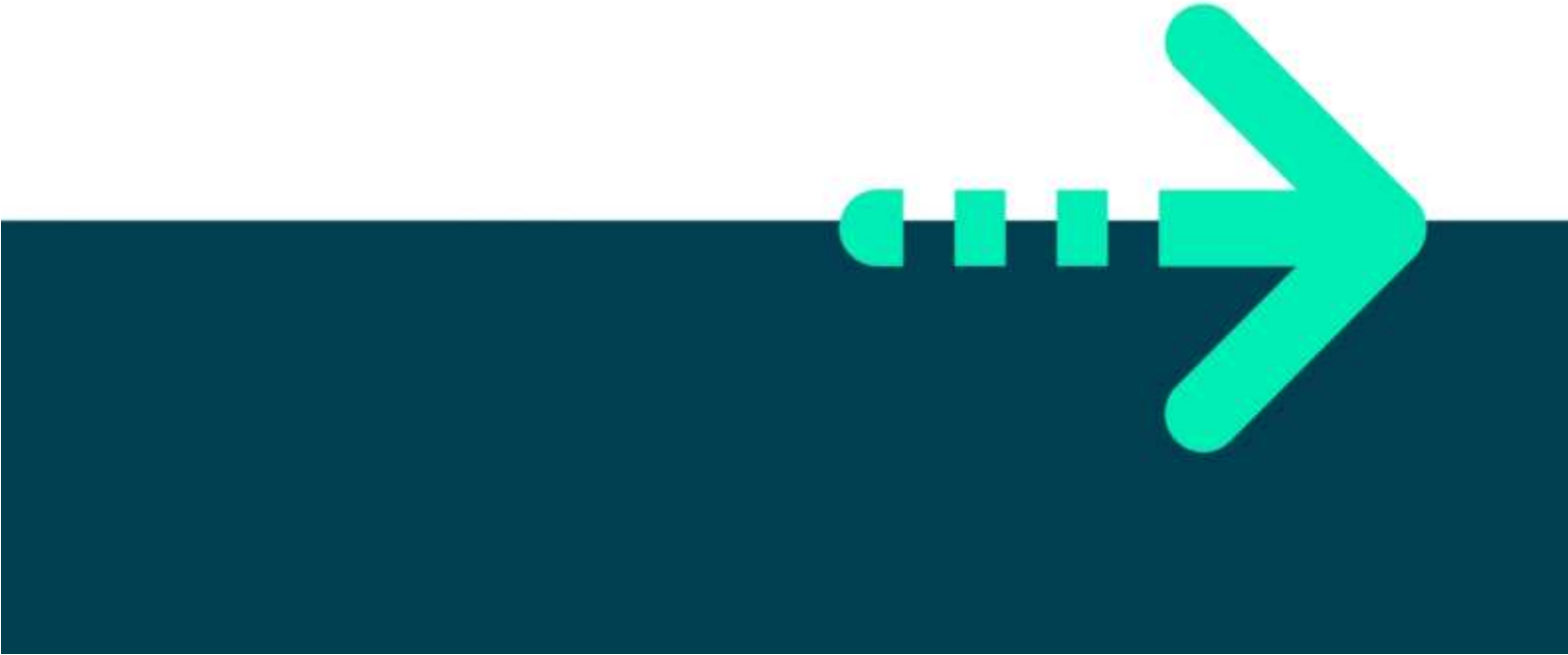
# Lloyds Banking Group

## Data Analyst Incubation Program

## Sprint 1 : User Guide for Dashboard [example]



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# Introduction

This is an example user guide for a dashboard built in Tableau. A dashboard user guide aims to:

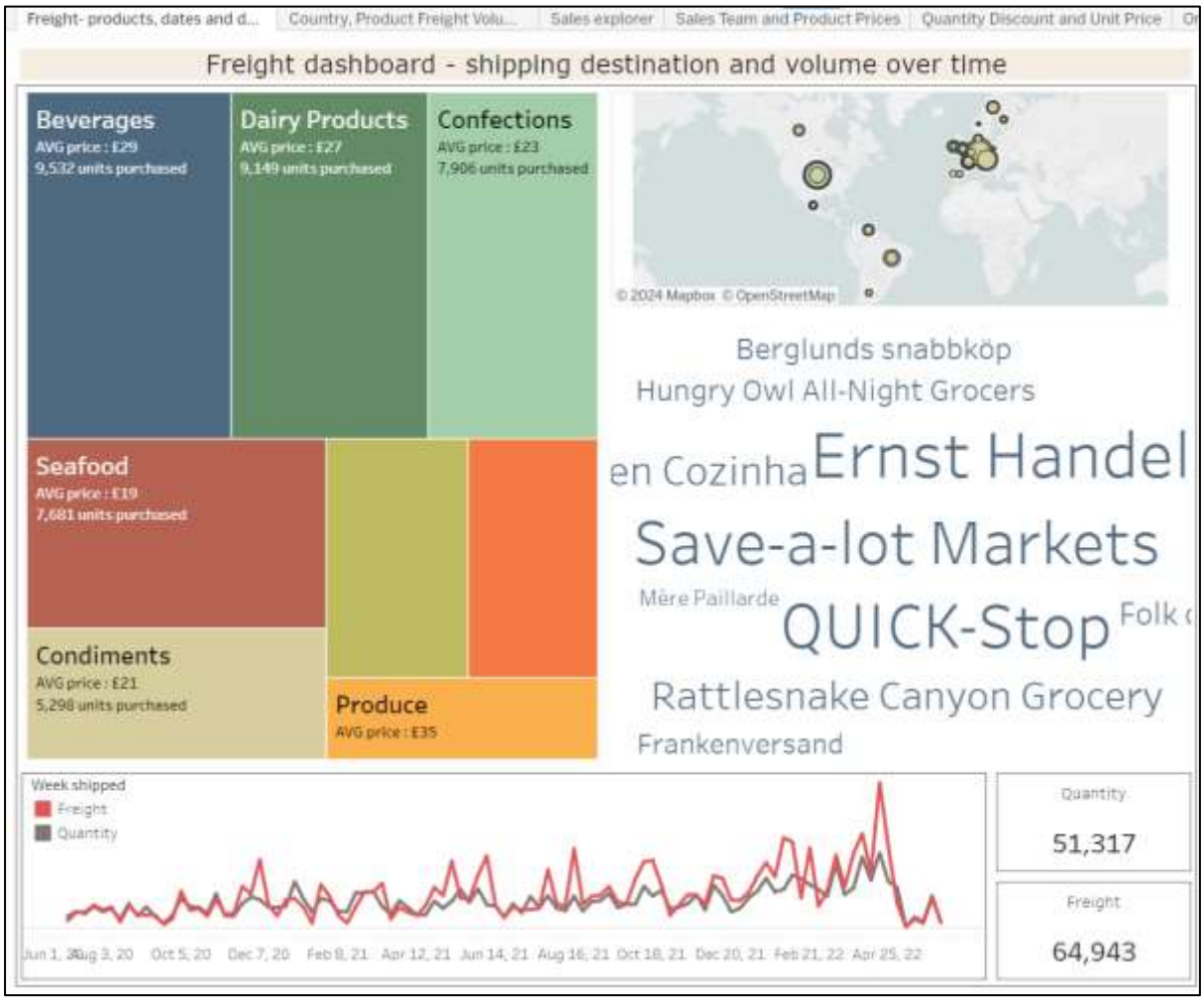
1) introduce the dashboard to intended end users, outlining how to use it, including utilising interactions and filters

2) explain any ambiguous terminology used in the dashboard

3) explain transformations and filters applied to the source data and any assumptions made when designing the dashboard

# User Guide for Dashboard

Link to dashboard




Welcome to the user guide for the Freight dashboard! This guide will walk you through the features and functionalities of your dashboard, helping you make the most out of it.

## 1. Logging In:

- Start by logging into the dashboard on the above link using your credentials provided by your administrator.

## 2. Dashboard Overview:

- Upon logging in, you will be directed to the dashboard landing page.
- The freight dashboard provides a comprehensive view of the

movement of freight to our global shipping partners, the volume shipped over time and the product categories that were shipped, to provide insights relevant to your organisation.

## 3. Navigation:

- The dashboard is the landing page of the Demo_NWind workbook, which consists of multiple tabs or sections, each focusing on different aspects of the NorthWind data.

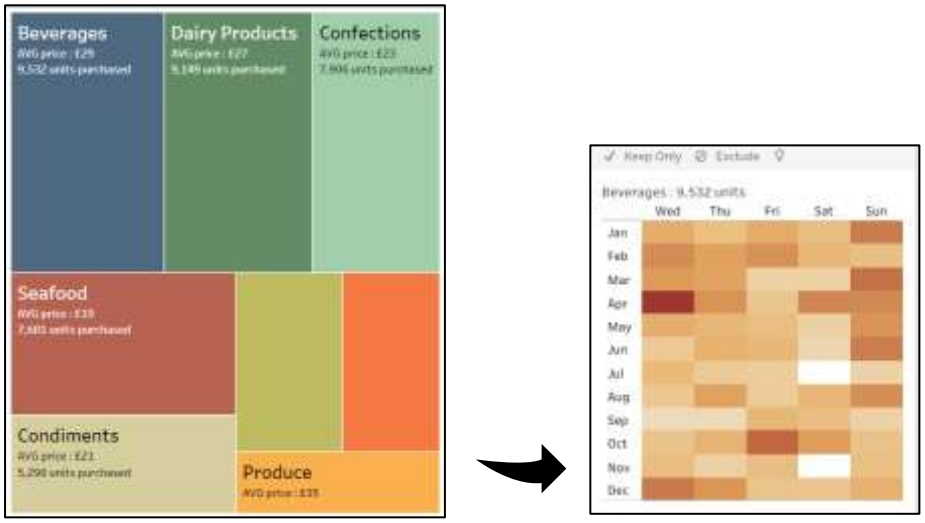
- Navigate between tabs of the workbook by clicking on the tabs.

## 4. Data Visualisation and Interactivity:

- The freight dashboard presents data in visual formats ; tree map, word cloud, bubble map, time series line chart.

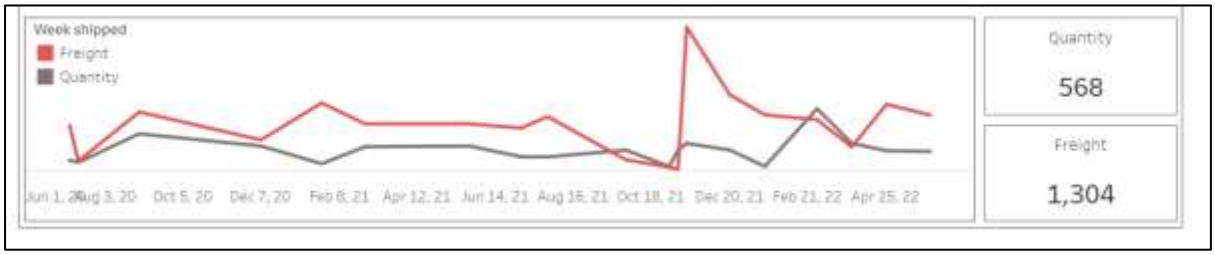
- also on the dashboard are non-interactive KPI values (large number displays)

- Interact with the dashboard visualisations by following these instructions:

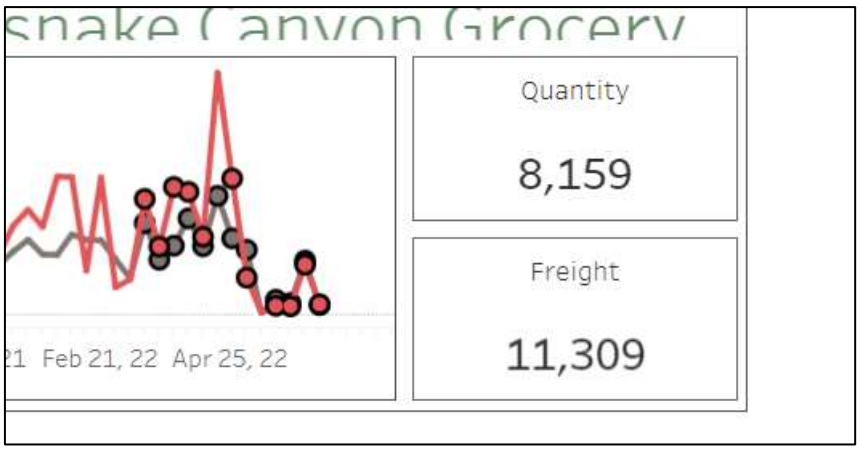



Tree Map : hover over the coloured rectangles of the tree map which represent each product category to see the tooltip pop up containing a highlight table. The highlight table reveals the monthly/ daily volume of freight shipped per product category. Hovering over the product rectangles will also update the word cloud which matches the colour of the tree map.

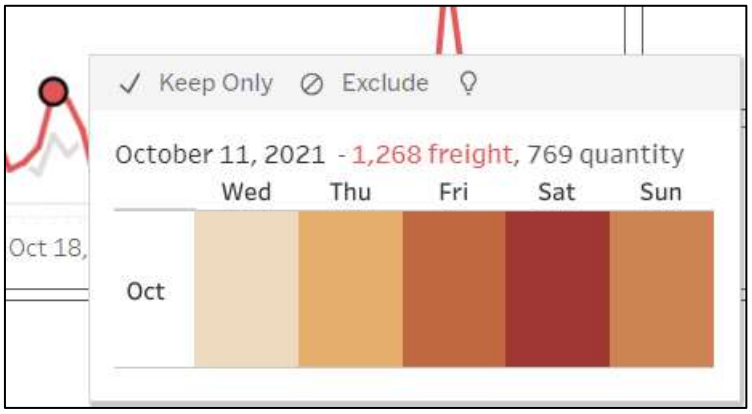
Map: Either select a bubble in the map OR .click and drag to use the rectangular multi select, this will filter the tree map, KPIs and time series plots.




Time series line chart : select a mark in the line chart or click and drag to multi-select – this will highlight the selected marks and refresh the Quantity and Freight KPI values.




Hovering over the time series chart will also reveal a weekday freight visual in the tooltip for that date mark.

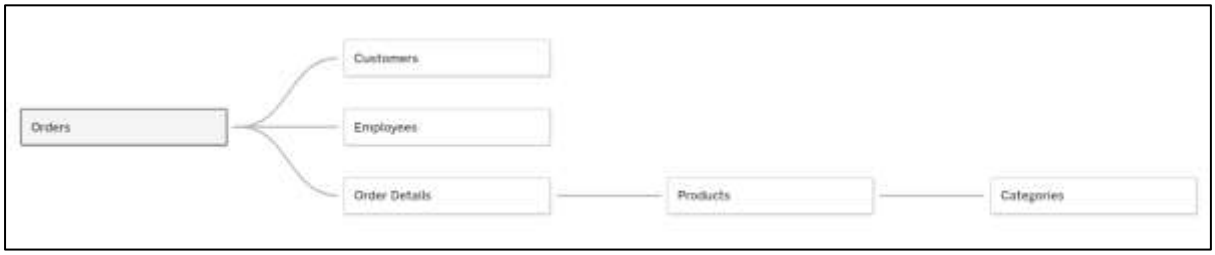



## 5. Assumptions and Exclusions:

It is assumed that Average Unit Price can be taken as the average price for each product category.

The dashboard was constructed using the NorthWind database. All of the tables in this data source were used and none of the data was removed from the source data through filtering.

The data tables were related in tableau using available ID/keys.




Two calculations were added to enhance the data:

1) Lead time (date difference between order date and required date)

2) Days to deliver (date difference between shipped date and required date)

## 6. Data Filters:

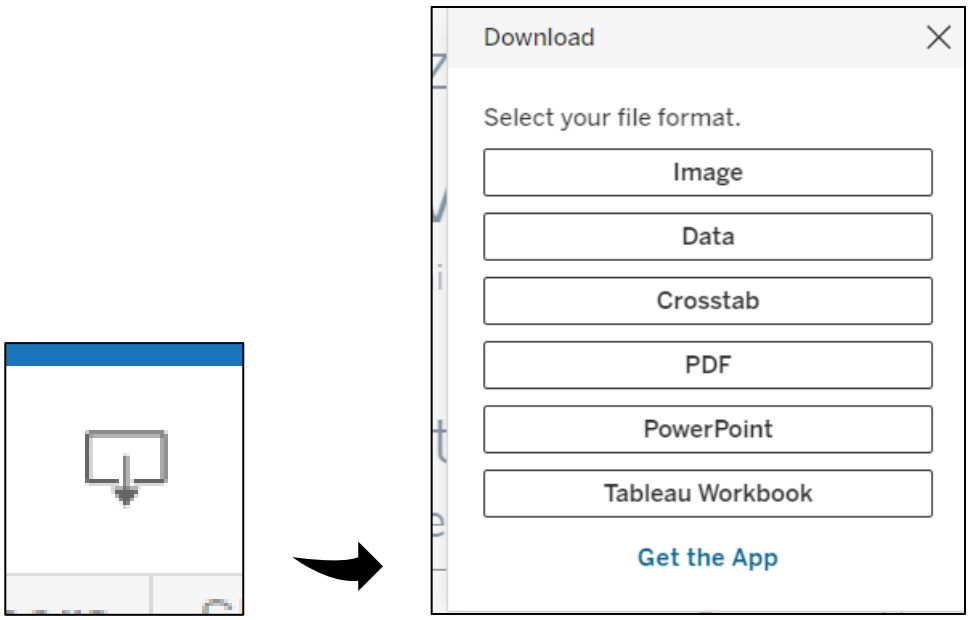
There are no visible filters in the dashboard other than the filter behaviour between visualisations above.

## 7. Alerts and Notifications:

Stay informed about critical updates or changes to the dashboard by subscribing to the report, which will send you alerts and notifications.

## 8. Exporting Data:

Export data from the dashboard for further analysis or reporting purposes by downloading the Data.




This will download the data as a csv file.

## 9. Help and Support:

If you encounter any difficulties or have questions about using the dashboard, you should contact the support team for assistance. Our support team is available to address any issues or provide guidance on

using the dashboard effectively.

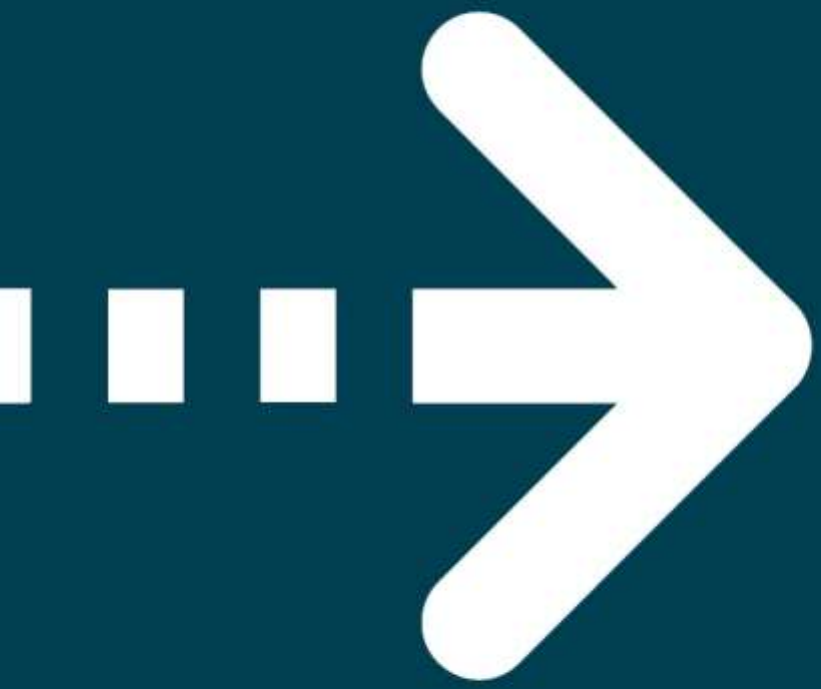
## 10. Security:

Always remember to log out of the platform when you're finished exploring the dashboard, to ensure the security of your account and data.

## 11. Tips for Effective Use:

The data will be updated weekly. Regularly review the dashboard to stay informed about key trends, performance indicators, and insights.

Share insight generated from the dashboard with colleagues or stakeholders to facilitate collaboration and decision-making by sharing the Current View using the generated link.

## Finally:

We hope this guide helps you navigate and utilise the dashboard effectively to support your goals and objectives. If you have any further questions or feedback, don't hesitate to reach out to us. Happy dashboarding!