



On-Demand Training: Building a Dashboard Transcript

Welcome to this video on building dashboards. You can download the Exercises workbook to follow along in your own copy of Tableau.

Dashboards can be created by clicking on the Dashboard tab, here at the bottom. The workspace for a dashboard looks a little different than the workspace for a sheet. For one, the data window is replaced by the dashboard window. Instead of listing the dimensions and measures from the data source, we have a list of the sheets in the workbook. Hovering will bring up a preview.

Below are dashboard elements such as text boxes and images, and some dashboard controls – including sizing for the canvas.

Dashboard Size

It's very important to consider the destination of a dashboard from the very beginning. If we click on the size selector, we see a lot of preset options. If the dashboard is intended to be embedded, one of the blog-sizings might be appropriate. Laptop is a good choice if the dashboard may be shown in a variety of places – not too large or too small. If the viz needs to be viewable across platforms, such as mobile, tablet, or PCs, Range may be the best option. Automatic will fill your screen.

We can also manually control the size, in the lower left, if there are specific dimensions we want to use, by setting the size to Exact.

A lot of effort goes into designing the layout and visual of a dashboard – it saves a lot of headache and time to start with an appropriately sized dashboard.

We can use this checkbox to toggle the dashboard's title on and off. Double clicking on a title, either for the dashboard or a sheet, brings up the text editor.

Adding Views to a Dashboard

Adding views to a Dashboard is very easy! Just like we can drag fields into a view, we can drag views onto a dashboard.

Any related legends will also come out, like this color legend– unless they've been removed on the sheet, and the sheet title automatically comes out as the title of the view

The first view will automatically take up the whole dashboard. Any subsequent views, though, can be placed in specific areas of the screen. Holding down the mouse button as we move our mouse around the dashboard shows grey areas indicating where this view will go when we let go.

If we bring it all the way to the very bottom, it will fill across the entire width, including the side panel with the legends. Clicking on the legend shows that highlighting works across all sheets relevant to that color legend.

Now that these two sheets have been added to the dashboard, note that they have checks next to their names in the Dashboard pane – this indicates they're in use in this dashboard.

Adding Objects to a Dashboard

In this area, we see options for other objects. All of these can be dragged onto the dashboard just like a view.

- Text will open with a text editor,
- Image will open a file browser to locate the image
- Web page will prompt for the URL

For more information, see the video on Dashboard Layouts and Formatting.

Fitting Sheets

Note that here, our bar chart has scroll bars – the size of the chart on the sheet is larger than the area we’ve given it on the dashboard. It’d be better to see the entire view, let’s adjust this dashboard to remove the scroll bars.

First, we can simply click on the top of the view and drag it up. This will resize the Running Total view and make the bottom view larger.

But we can also click into the bar chart and in the menu drop down in the header, select Fit > entire view

This menu has a lot of options – we’ll go over many over the course of the Dashboard videos, but I recommend exploring what’s available in the menu – for example, turning the title on and off.

Legends and Quick Filters

Dashboards are all about interactivity. Let’s bring out the last sheet – just like with fields, we can double click sheets to bring them out. If the default location isn’t where we’d like them to end up, we can always rearrange by clicking on the view and using the header.

Note that this sheet brought its color legend with it. We can click on it to bring up the header, and remove this from the dashboard. If the view had a quick filter, it would also automatically come out into the dashboard.

We want to have a quick filter for Ship Mode.

- Click on any view where this would be a relevant filter,
- Click on the menu caret
- And there’s an option for Quick Filters
- We’ll add Ship Mode

Now the quick filter is on the dashboard, we can format it just like we can in a view.

- We’ll change the layout to single option list

Let’s do the same thing and add a Quick Filter for Order Priority

- And we’ll change it to a multiple dropdown list

We could add a legend the same way, going to the menu and selecting legend then picking the appropriate field.

Filters on Dashboards

When we click through a filter, we see that by default, it only applies to the view it came out with.

- If we want to make the quick filter apply to more of the dashboard
- We simply click on the filter, open the menu
- And under Apply to Worksheets, select the appropriate option
 - In this case, we'll say "all using this data source"
 - And we'll do the same thing for the Order Priority Filter
- Now when we make a selection, it applies to the whole dashboard.

Similarly, we can make a view act as a filter for the dashboard

- We'll click on the view we want to use as a filter, open the menu, and select "use as filter"

Now if we select a header such as Second Class, all the relevant views are filtered.

Conclusion

Thank you for watching this Dashboard training video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.