



---

# On-Demand Training: Dashboard Best Practices Transcript

Welcome to this video on Dashboard best practices. This video is intended as a theoretical overview of dashboard design and does not go into details of how to create the various elements.

## Dashboard Design Elements

There are several areas that need to be considered when designing a dashboard. At the most basic level, planning a dashboard should consider the following elements

- First, size
  - Will the dashboard be consumed via Tableau Server or Online? Embedded in another webpage? On mobile? On a large display screen?
  - These questions should be answered before choosing a size for the dashboard.
- Second, layout and flow
  - How will the end user ingest the information?
  - Are the views appropriate and in a good order?
- Third, interactivity and labels
  - Is there a clear call to action?
  - Are filters and legends intuitive?
  - Do labels provide useful information for the end user?
- Fourth, color and clutter
  - Is the use of color purposeful and clear?
  - Has unnecessary visual distraction been minimized?
- Fifth, performance
  - Has the workbook been designed with the performance of the data queries in mind?

To illustrate these elements in action, I'll go over this workbook on global energy and discuss various design choices.

## Layout and Flow

First, layout and flow

- Be careful when using more than 3 views on a single dashboard – the more views, the more important it is to consider their placement and sizing thoughtfully.
- Cultures whose languages are written left to right and top down place emphasis and importance to objects in the upper left.
- Here, the map in the upper left is the global overview
- The bar chart has a long list of rows, so it's been given more vertical space

## Interactivity and Labels

Second, interactivity and labels

- The three filters are grouped together and placed where they are clearly visible
- The titles are informative, letting the end user know that a selection can be made
- The views' titles and axis labels work together to explain what each view shows

## Color and Clutter

Third, color and clutter

- There is a single color scheme across all views, without excessive numbers of colors
- There are no unnecessary visual elements, and the gridlines and borders present are subtle
- The overall dashboard is crisp and uncluttered

## Performance

Fourth, performance

- The more complex the query necessary to create the view, the greater the impact on performance.
- This dashboard has a few filters with a small number of options

## Conclusion

Well designed dashboards take a lot of planning. There are many resources available on the website to help you design and create an effective, well performing dashboard. Some resources are linked to below.