Free Training Transcript: Building a Dashboard

Welcome to this video on building dashboards. You can download the Exercise 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 pane is replaced by the dashboard pane. 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.

Dashboard Size

It's very important to consider the destination of a dashboard from the beginning. In the size area, we have three main options: fixed size, automatic, and range. Fixed size offers us a list of pre-set dimensions or the ability to set our own custom size. If we select range, we can set the boundaries for how large or small the dashboard can grow or shrink. Automatic allows the dashboard to fill the available area.

There's also the option, above, to turn on Device Preview. For more information on this feature, check out the video on Device Designer.

A lot of effort goes into designing the layout and visual of a dashboard – you can save headache and time by considering things like size and devices from the beginning.

Adding Views to a Dashboard

Adding views to a Dashboard is very easy! Just like we drag fields into a view, we can drag views onto a dashboard! Any related legends will also come out, like the color legend on the right – unless they've been hidden on the original sheet. 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 be placed 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 legends. Speaking of legends, we can see 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.

Adding Objects to a Dashboard

In the Objects area, we see options for things like layout containers and text boxes. All of these can be dragged onto the dashboard just like a view. For more information, see the video on Dashboard Layouts and Formatting.

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.

Fitting Sheets

Notice 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's better to see the entire view, let's adjust this dashboard to remove the scroll bars. First, we can simply click at 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 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 and filter. We can click on the color legend and remove it from the dashboard. What if we want to add a filter we don't have? Let's say we want to be able to filter by Ship Mode. Click on any view where that filter would be relevant, click on the menu caret, and there's an option for Filters. We'll add Ship Mode.

Now the filter is on the dashboard, we can format it just like we can in a view. Let's change the layout to single option 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 this 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 related data sources" and we'll do the same thing for the Market Filter. Now when we make a selection, it applies to the whole dashboard, regardless of what data source the view is built from.

Similarly, we can make a view act as a filter for the dashboard. Click on the view to bring up the header bar, and click the filter icon. 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 Free Training videos to learn more about using Tableau.