



Free Training Transcript: Dashboard Formatting

Introduction

Welcome to this video on dashboard formatting. You can download the Exercise workbook to follow along in your own copy of Tableau.

Titles

Good titles are important for effective communication. If we double click, we can edit a title. The default is the sheet name, but we can replace that with whatever we want.

A good trick is to insert a dynamic value into the title. Let's rename this "Average Cost for" and if we click on Insert, we'll get a list of things that can be added. This depends on what fields are in use in the view. We'll insert Ship mode and then we'll follow up our title with "Shipping". Now as we play with the Ship mode filter, we'll see the title dynamically change.

Fonts

Speaking of titles, we can format fonts for a dashboard in a couple of ways. Just like on a viz, we can right click on an element and format it directly. The format pane gives us options for font. As a disclaimer, I'm going to make things pretty ugly over the rest of the video, because I want to highlight what's going on. These are NOT visual best practices! If we just want to focus on the dashboard, we can go to format menu and select Dashboard. Here we can set the font for the dashboard title, as well as things like text objects. The format menu also has an option for Workbook. This lets us format fonts and lines across the entire workbook. Note that if I set all here to be Tableau Book, it resets the changes I made before. This is great for maintaining consistency. But let's go back to the Dashboard formatting pane for a moment and discuss shading.

Shading

Like fonts, shading is controlled at various levels. To start, if we change the dashboard shading, we see it impacts things like the titles, legends, and filters. But the vizs themselves haven't taken the background color. Views have their own formatting. To make the entire dashboard this color, we'd need to go to each view on the dashboard and format their shading. Right click in a view and select format. If we go to Shading, and pick

the same color, we see that that view now matches the rest of the dashboard. We can also control shading from the layout tab.

Layout Containers

Down in the item hierarchy, we'll expand the layout containers until we get to the vertical one that holds the legends and filters. (Layout containers are automatically added by Tableau to control the placement of objects. For information about using layout containers as containers, check out the video on Dashboard Objects.) With this layout container selected, other options in the layout pane become available. We can add a border, set a background color, and control things like padding. If I select something other than the layout container, we can see what has taken the color and border. This can be great for visually distinguishing controls like filters and such.

If we select the layout container again, we also see options for inner and outer padding. With that border and shading on, let's see what these can do. If we click into Outer Padding, we can decide if all sides are equal or not, and adjust the padding. Notice that when we increasing the outer padding, the bordered and shaded region “shrinks”, and the dashboard color shows around it. We can see the outline of the layout container that is still selected. If we switch to inner padding—let's change just the top padding. Now the space being added is between the border and the filter's title.

I've been using a layout container in this example, but we can select any item in the hierarchy and control its padding—and position—in this way, giving us complete control over each object, and therefore the entire dashboard.

Closing

Thank you for watching this video on dashboard formatting. We invite you to continue with the Free Training videos to learn more about using Tableau.