Free Training Transcript: Dashboard Objects

Welcome to this video on formatting dashboards and dashboard layouts. You can download the Exercise workbook to follow along in your own copy of Tableau. This video is on formatting a standard dashboard. For information on designing dashboards for specific devices, check out the device designer video.

Tiled and Floating Layouts

By default, views and legends pull out into the view as tiled dashboard objects. When we bring out a sheet, the grey drop area covers a region of the canvas. What we're seeing here is tiled behavior. If we click here at the bottom where it says Floating, we can change it. Note how the grey drop area indicator looks different, and if we let go, this view and all its legends and filters will come out on top of the view underneath. We can then freeform adjust the size and location.

Floating Objects

Even with the dashboard set to tiled, we can float individual objects. Let's float the color legend for the map—we can do so from the menu, or, if we hold down the shift key and click and drag, this object will float. Tiled layouts automatically fill the entire space. Floating objects can have a custom size and position. With that legend selected, if we click the Layout tab, we're brought to controls for this element. We can make precise adjustments position and size

Images & Web Pages

Images can be added to dashboards simply by dragging out the Image object and navigating to the location of the image. By going to the menu, we can fit the image and center it and even turn it into a hyperlink by adding a URL. If we want to add a web page, we simply bring out the web page part, we can drop it here at the bottom. For the URL, I'll put tableau.com. Simply dragging on the top lets us resize this and it's still fully interactive, just like in a browser. And notice that the logo resized dynamically as we adjusted the layout, because we chose to fit the size. However, if we wanted to move the logo over to the left, there's no left align option, just centering. So instead, we can bring out a blank object to the right, and adjust it until the logo is where we want it to be. This of course is redundant with the webpage.

Layout Containers

Layout containers are a great way to control placement on a dashboard. First, we can bring out multiple vizzes into a single layout container, and, by selecting the container, choose to distribute them evenly. But layout containers can do more than that, they can also help with dynamic resizing. Here, when we have a tiled layout, note that if we click to a specific ship mode, the bar chart is a static size but more or fewer bars are squeezed into the same area. Let's go to a blank dashboard and bring out a vertical layout container. We'll bring out Running Total, and below it, Shipping Cost. And bring out the filter for Ship Mode. Now let's see how layout containers handle the resizing of these bars. When we're filtered to All modes, the Running Total is pretty small up at the top. But as we deselect modes, the bar chart collapses and the Running Total chart automatically fills that space. For more information on working with Layout containers, check out the Online Help.

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.