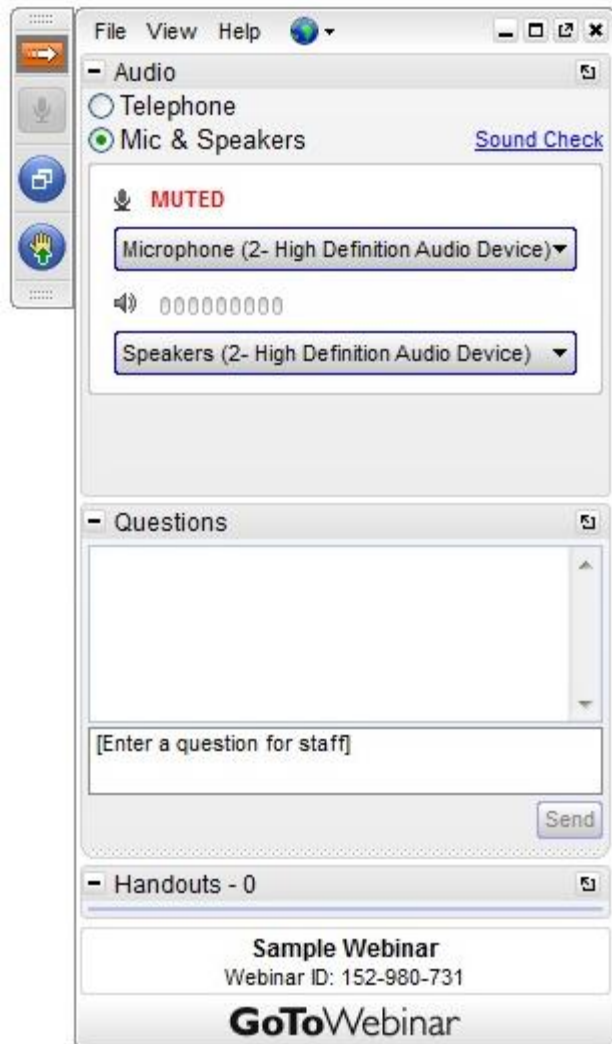# Tableau Dashboard Design: Best Practices

Data Exploration and Actionable Insights

GoToWebinar Control Panel
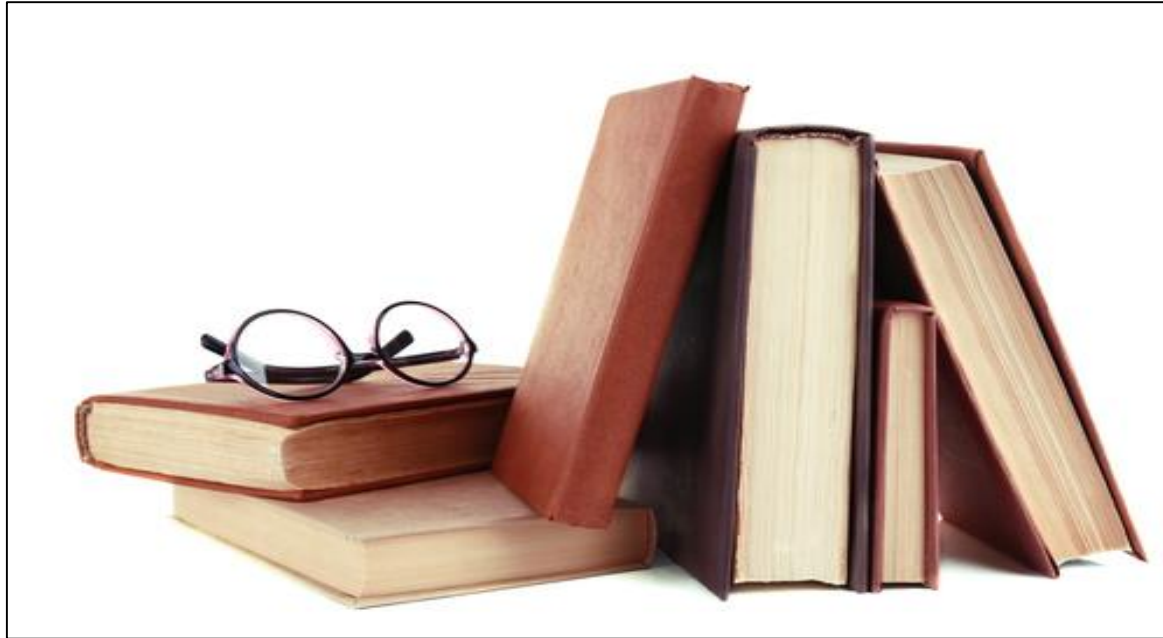
Click arrow to restore full control panel

Submit questions here

Presentation Slide Deck:
http://www.senturus.com/resources/

RESOURCE LIBRARY
An extensive, free library of past
webinars, demonstrations,
whitepapers, presentations, helpful
hints, and more.

Agenda

- Introduction
- Senturus Overview
- Presentation in Tableau Workbook
- Additional Resources
- Q&A

Introducing...Today's Presenters

Michael Weinhauer

Practice Area Director /
Solutions Architect

Senturus, Inc.

Jim Frazier

VP of Client Solutions

Senturus, Inc.

Who We Are

Business Analytics Consultants

Bridging the Gap Between Data & Decision Making

Business Analytics Architects

- Dashboards, Reporting & Visualizations

- Data Preparation & Modern Data Warehousing

- Self-Service Business Analytics

- Big Data & Advanced Analytics

- Planning & Forecasting Systems

- Software to Automate and Enable our Clients in the Practice Areas Above

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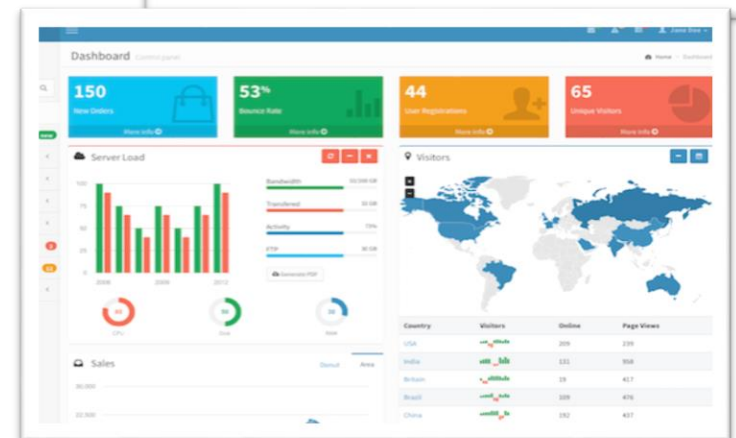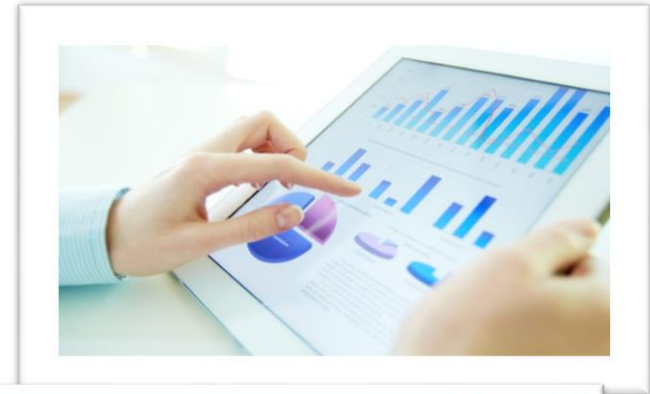
1000+ Clients, 2000+ Projects, 16+ Years

Poll

What are your biggest challenges in creating effective dashboards? (Select all that apply)

- Properly prepared data
- Understanding the business problem behind the dashboard
- Skill level with Tableau
- Securing and/or distributing workbooks
- Other

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TABLEAU WORKBOOK

"10 ~~Best~~ _**Better**_ Practices for Tableau Dashboard Design"

1. How to design a dashboard with a goal in mind.
2. How the overall dashboard layout impacts effectiveness.
3. How to design for best performance.
4. Which chart type work best, for specific goals.
5. How to use the three color types effectively.
6. How to get the most impact from text.
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8. When to use any of the three basic types of navigation.
9. Some things to (almost) never do.
10. The two fundamental, guiding principles, for all dashboards.

Pulling it all together....

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+ a b | e a u

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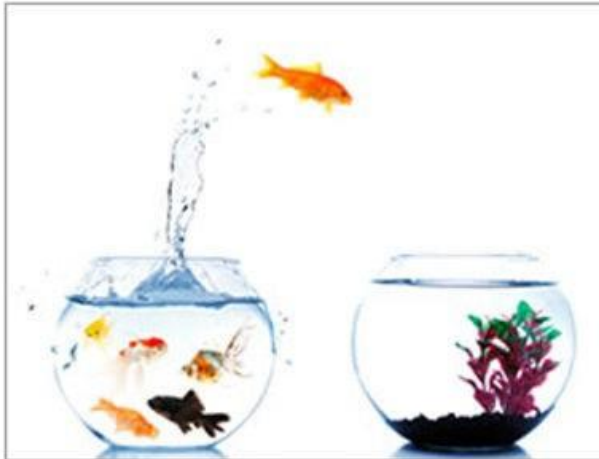# "10 ~~Best~~ _Better_ Practices for Tableau Dashboard Design"

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Pulling it all together....

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"Best" vs "Better"/"Good"

"Best" dashboard is the one that
    - yields actionable insights
    - gets adopted by end user(s)

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What do they all have in common?

.."woof" is right!

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KISS Still Applies

"The painting isn't done when I can't get anything else in, but when I can't take anything else out." - Famous painter

"I have only made this letter longer because I have not had the time to make it shorter." - Blaise Pascal

Tableau's great strength is also its (and by extension, possibly your) greatest weakness - avoid over-complicating!

- Use the 5 Second Rule
- Introduce to end users w/out training
- Experiment and iterate rapidly WITH end users

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Record Breaking Coasters

The Fastest Roller Coasters in the World

	Coaster	Speed
1	Formula Rossa	149 mph
2	Kingda Ka	128 mph
3	Top Thrill Dragster	120 mph
4	Dodonpa	107 mph
5	Superman: Escape from Krypton	100 mph
6	Tower of Terror II	100 mph
7	Fury 325	95 mph
8	Steel Dragon 2000	95 mph
9	Millenium Force	93 mph
10	Leviathan	92 mph

Speed **Height** **Inversions** **Length**
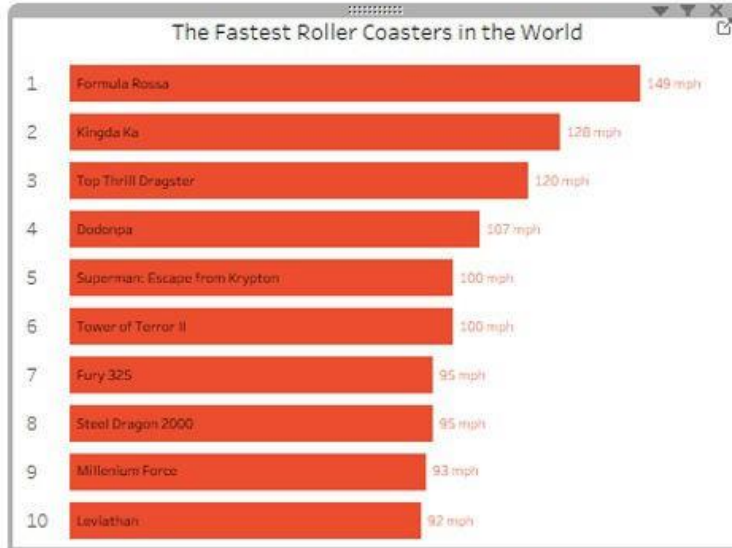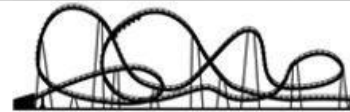
Formula Rossa POV

Formula Rossa
Ferrari World
Abu Dhabi
Abu Dhabi
UAE

Height (ft)	171
Length (ft)	6,562
Speed (mph)	149
Inversions	0

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Superstore Metrics
at a glance..

441 ▼	900 ▼	191K ▼	1,311K ▲	15% ▼	$101 ▲
customers	orders	profit	sales	profit ratio	avg unit price

Departmental Metrics

Monthly Trend (click to filter)　　　　　　　　Detail

3% ▣ 42%
Regional Profit Hotspots

				Customers	Orders	Sales	Profit	Ratio	Central	East	South	West
choose a metric Profit	Furniture		▼	195	247	$525K	$35K	7%				
choose relative date 1/1/2015 12:00:00 ..	Office Supplies		▲	355	580	$271K	$46K	17%				
	Technology		▼	229	293	$515K	$110K	21%				

Hot Spots by State (click a state to filter dashboard)

Profit
987　　　34.825

Top 10 Customers (Profit)

Jesse Williams Katz
Donald Montgomery
Gordon Brandt
Ruth Stout
Deborah Paul
Valerie Hahn
Diana Schultz
Steve Martin
Dwight Albright Huffman
Marilyn Bishop

0K　2K　　4K　　6K　　8K
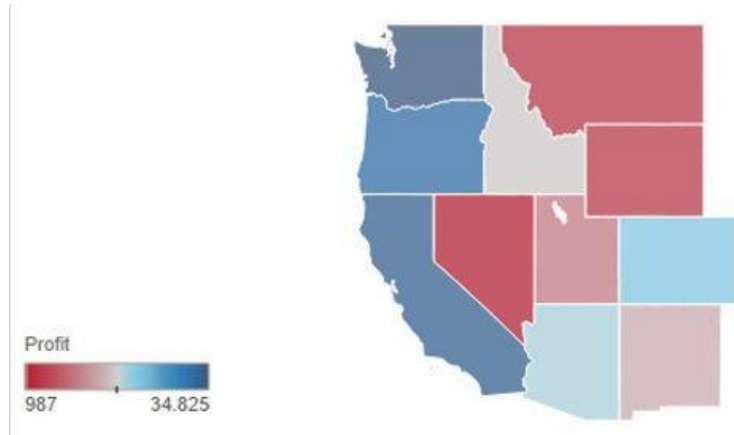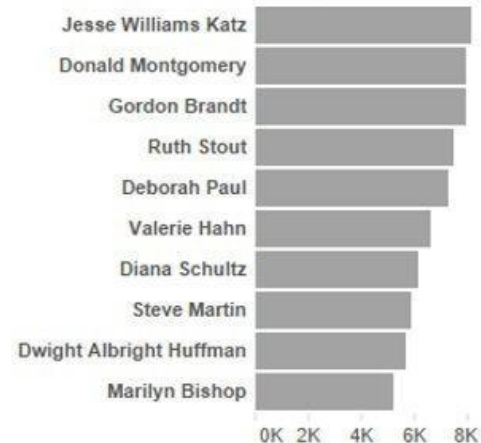
Regional Profit Dashboard

Regional Profit and Monthly Trends (click to filter)

| $40K Central | $47K South | $92K East | $108K West |

State Illumination (click to filter)

Profit
($26K) — $76K

YOY Variance
(click to filter)

North Carolina	-2050.82%
Tennessee	-1923.40%
Colorado	-219.33%
Illinois	-140.13%
Wyoming	-100.00%
Maine	-100.00%
Rhode Island	-90.94%
Nevada	-83.88%
Alabama	-82.52%
Virginia	-77.00%

Customer Segment/Sub-Category Heatmap (click to filter)
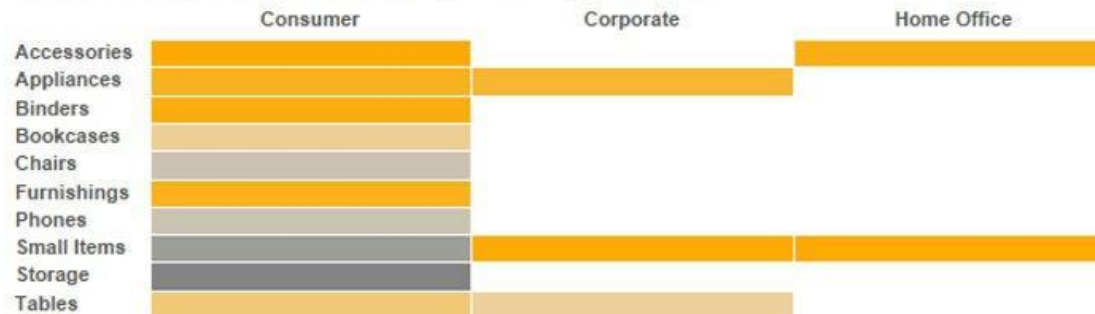
	Consumer	Corporate	Home Office
Accessories			
Appliances			
Binders			
Bookcases			
Chairs			
Furnishings			
Phones			
Small Items			
Storage			
Tables			

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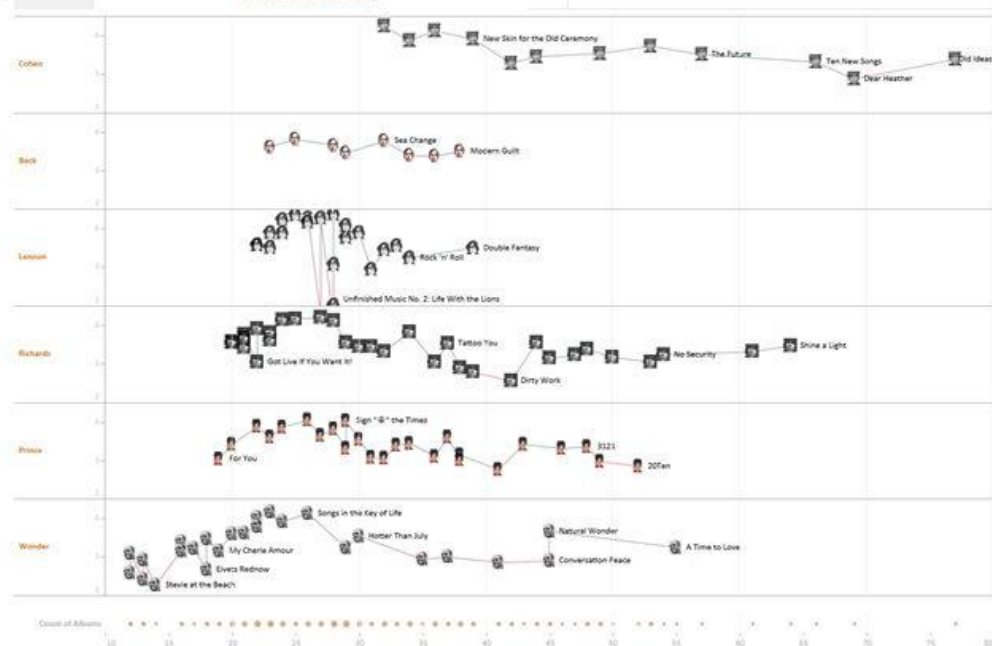
+ableau

Don't give your users headaches, give them hot dogs!

Or visual belly rubs...

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Visualizations should be VISUAL!
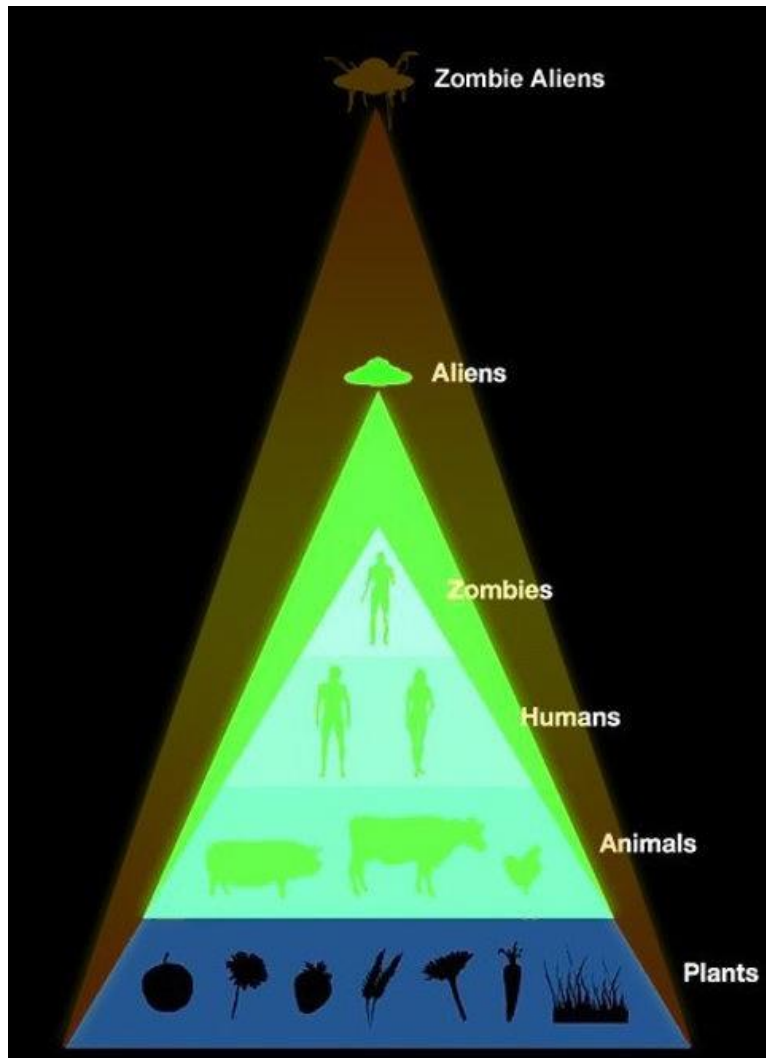
Pre-attentive visual capabilities are a big part of what propelled you to the top of the food chain (except for apparently zombies, aliens, and of course, zombie-aliens)…

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...by keeping you from being eaten by T-Rexes...

...and Saber Tooth Tigers...

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Only to die playing Pokemon Go, but that's another story...

Pre-Attentive Attributes - The Eyes Have It!

- When our eyes are open, our vision accounts for **two-thirds of the electrical activity of the brain** — a full 2 billion of the 3 billion firings per second, *and*
- **50% of our neural tissue** is directly or indirectly related to vision*
- More of our neurons are dedicated to vision than the **other four senses combined**, *and*
- olfactory cortex is losing ground to the visual cortex - about **60 percent of our smell-related genes have been permanently damaged in this neural arbitrage****

* Source: John Medina, Brain Rules, 2015
** Source: Neuroanatomist R.S. Fixot, 1957

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Form

Orientation
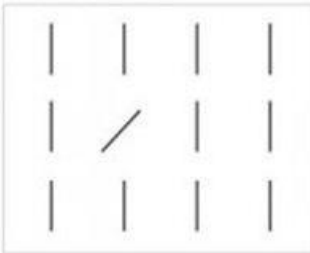
Line Length
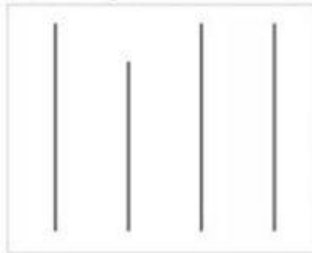
Line Width
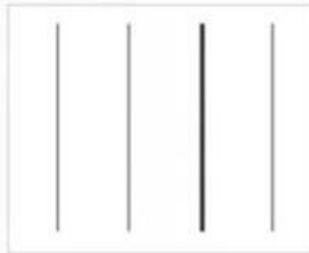
Size
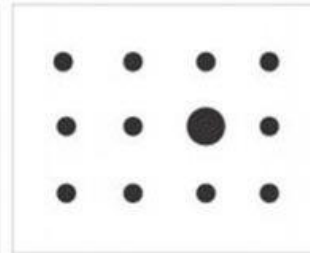
Shape
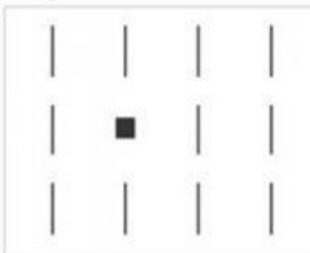
Curvature
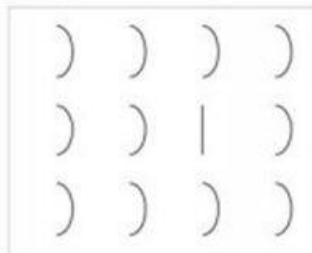
Added Marks
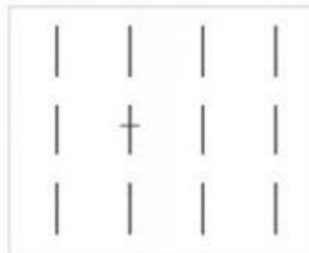
Enclosure
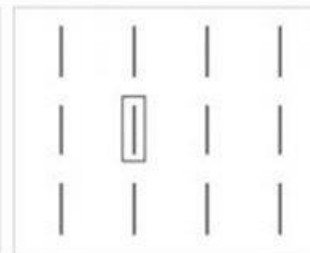
Color

Intensity
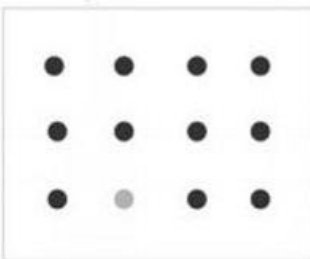
Hue
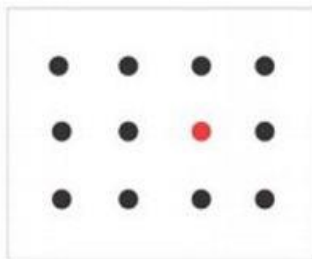
Spatial Position

2-D Position

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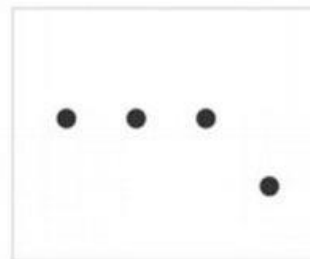
Visualization is part art, part science. Engage BOTH sides of your brain!

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Pulling it all together....

..

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Goal-Bad

State Sales/Profit Summary

Customer State

Alabama	
Arizona	
California	
Colorado	
Connecticut	
Delaware	
Florida	
Georgia	
Idaho	
Illinois	
Maryland	
Massachusetts	
Michigan	
Nebraska	

Profit $
7,297 — 80,090

Sales $ (0K, 50K, 100K, 150K, 200K, 250K, 300K, 350K, 400K, 450K, 500K)

Product Sales/Profit Summary

Product Name

- Riverside Palais Royal Lawyers Bookcase, Royale Cherry Finish
- Polycom ViewStation™ ISDN Videoconferencing Unit
- Hewlett Packard LaserJet 3310 Copier
- Global Troy™ Executive Leather Low-Back Tilter
- Canon PC940 Copier
- Panasonic KX-P3626 Dot Matrix Printer Fellowes
- PB300 Plastic Comb Binding Machine
- Polycom ViewStation™ Adapter H323 Videoconferencing Unit
- SAFCO PlanMaster Heigh-Adjustable Drafting Table Base, 43w x 30d x 30-37h, Black
- Sharp AL-1530CS Digital Copier
- Hoover WindTunnel™ Plus Canister Vacuum
- Canon imageCLASS 2200 Advanced Copier
- Global Leather and Oak Executive Chair, Black
- Canon PC1080F Personal Copier

Sales $ (0K, 20K, 40K, 60K, 80K, 100K, 120K, 140K, 160K, 180K)

Goal-Good

Profit $

-13,079 27,215

Product Cate..	Month of Ord..	Central	East	South	West
Furniture	January				
	February				
	March				
Office Supplies	January				
	February				
	March				
Technology	January				
	February				
	March				

Region

Sales $ — 0K, 50K, 100K (Central, East, South, West)

Selected detail

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Pulling it all together....

Layout-Bad

Product Container	Product Category	Customer Segment			
		Consumer	Corporate	Home Office	Small Business
Jumbo Box	Furniture	▇	▇	▇	▇
	Technology		▪		
		0K 50K 100K Sales $	0K 50K 100K Sales $	0K 50K 100K Sales $	0K 50K 100K Sales $

Sheet 16

Customer Sta..

Illinois	▇▇▇▇▇▇▇▇
Texas	▇▇▇▇▇▇
Michigan	▇▇▇▇
Nebraska	▇▇▇
Wisconsin	▇▇▇
Ohio	▇▇

0K   20K   40K   60K   80K   100K
Sales $

DRIVER - Click a bar to change other charts

Product Cont..	Region			
	Central	East	South	West
Jumbo Box	▇	▇	▇	▇
Jumbo Drum	▇	▇	▇	▇
Large Box	▇	▇	▇	▇
Medium Box	▪	▪	▪	▪
Small Box	▇▇▇	▇▇▇	▇▇▇	▇▇▇
Small Pack	▪	▪	▪	▪
Wrap Bag	▪	▪	▪	▪
	0K 500K Sales $	0K 500K Sales $	0K 500K Sales $	0K 500K Sales $

Layout-Good

DRIVER - Click a bar to change other charts
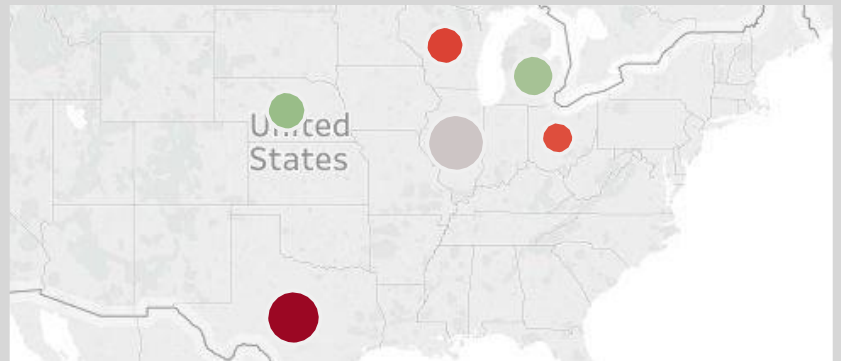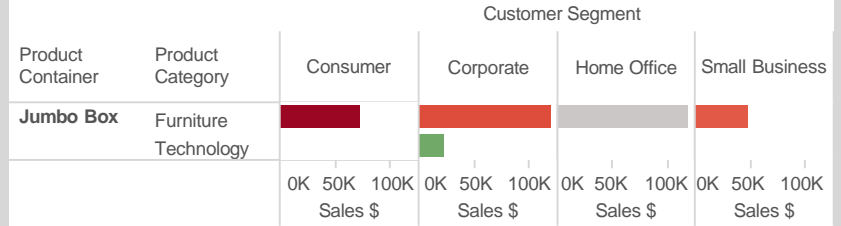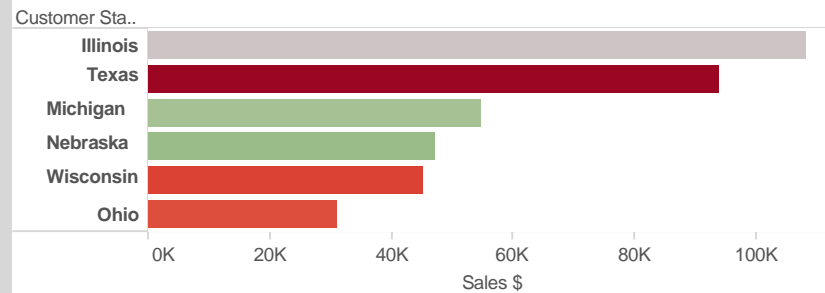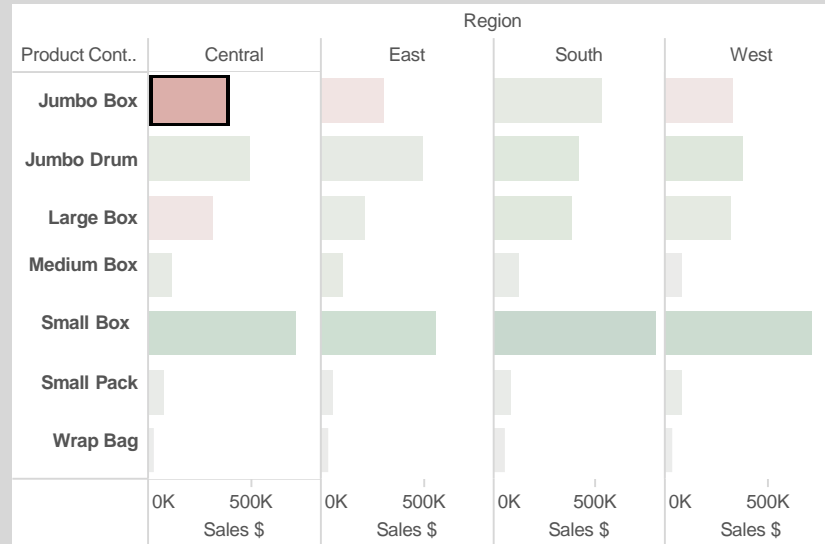
Region

Product Cont..	Central	East	South	West
Jumbo Box				
Jumbo Drum				
Large Box				
Medium Box				
Small Box				
Small Pack				
Wrap Bag				

Sales $

Customer Segment

Product Container	Product Category	Consumer	Corporate	Home Office	Small Business
Jumbo Box	Furniture				
	Technology				

Sales $

Customer Sta..

Illinois	
Texas	
Michigan	
Nebraska	
Wisconsin	
Ohio	

0K 20K 40K 60K 80K 100K
Sales $

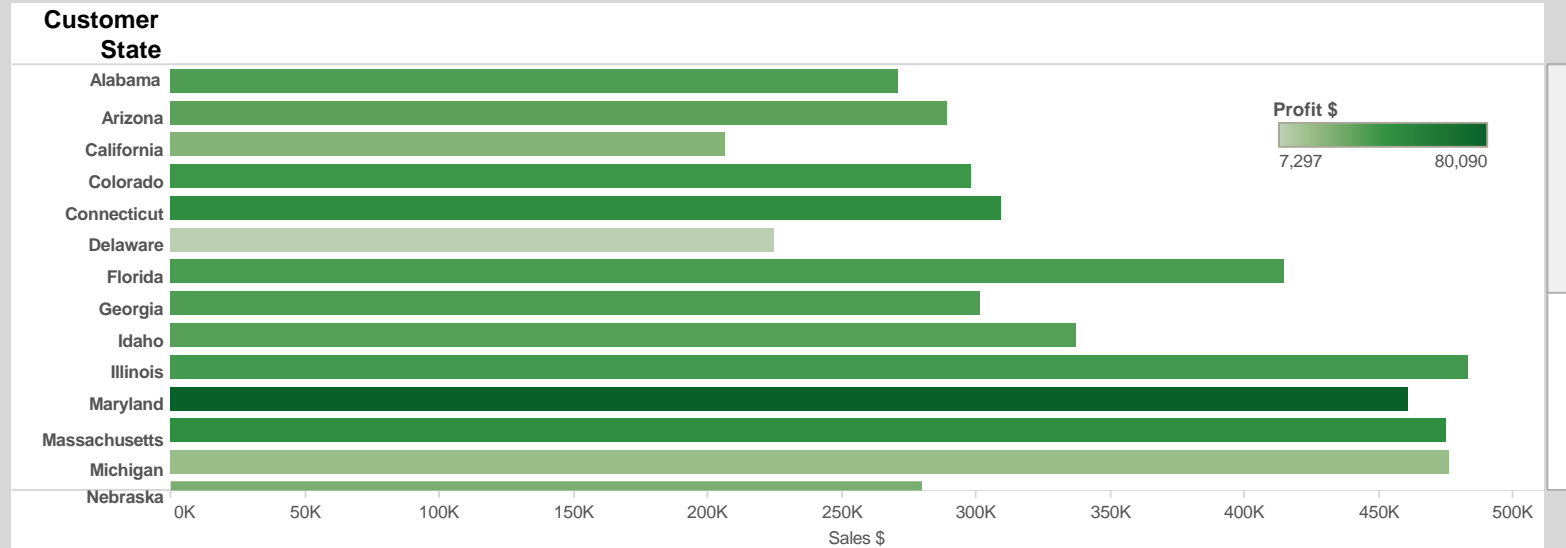1. How to design a dashboard with a goal in mind.
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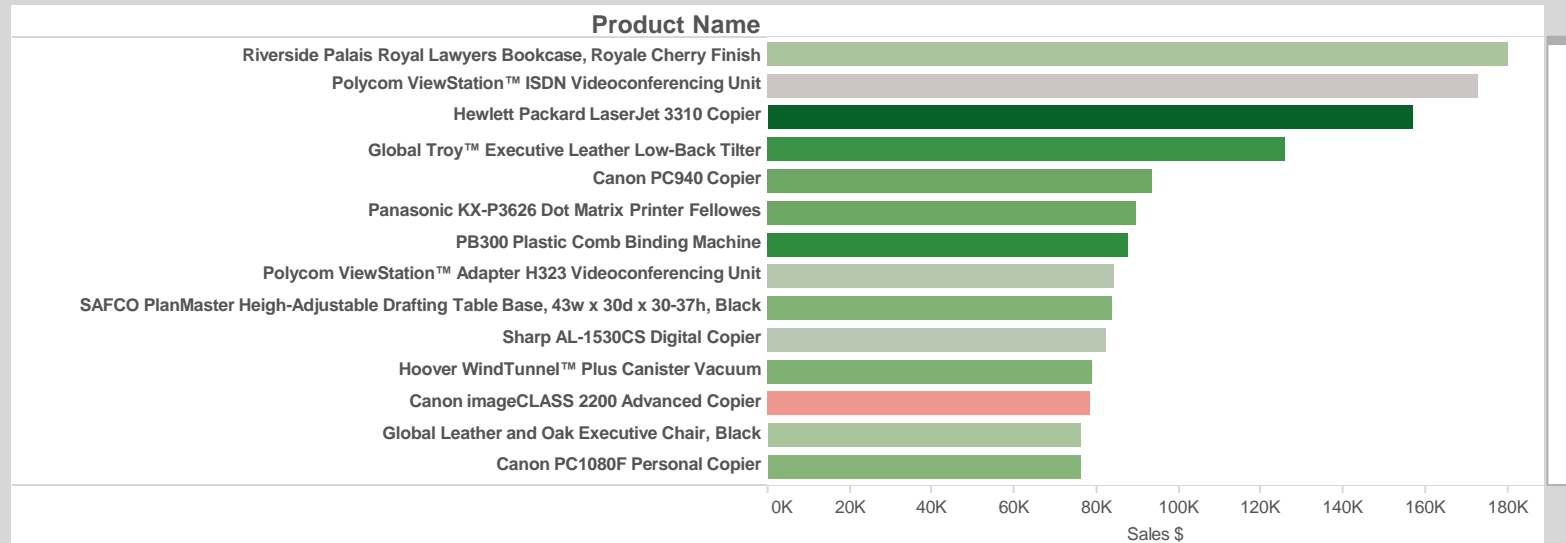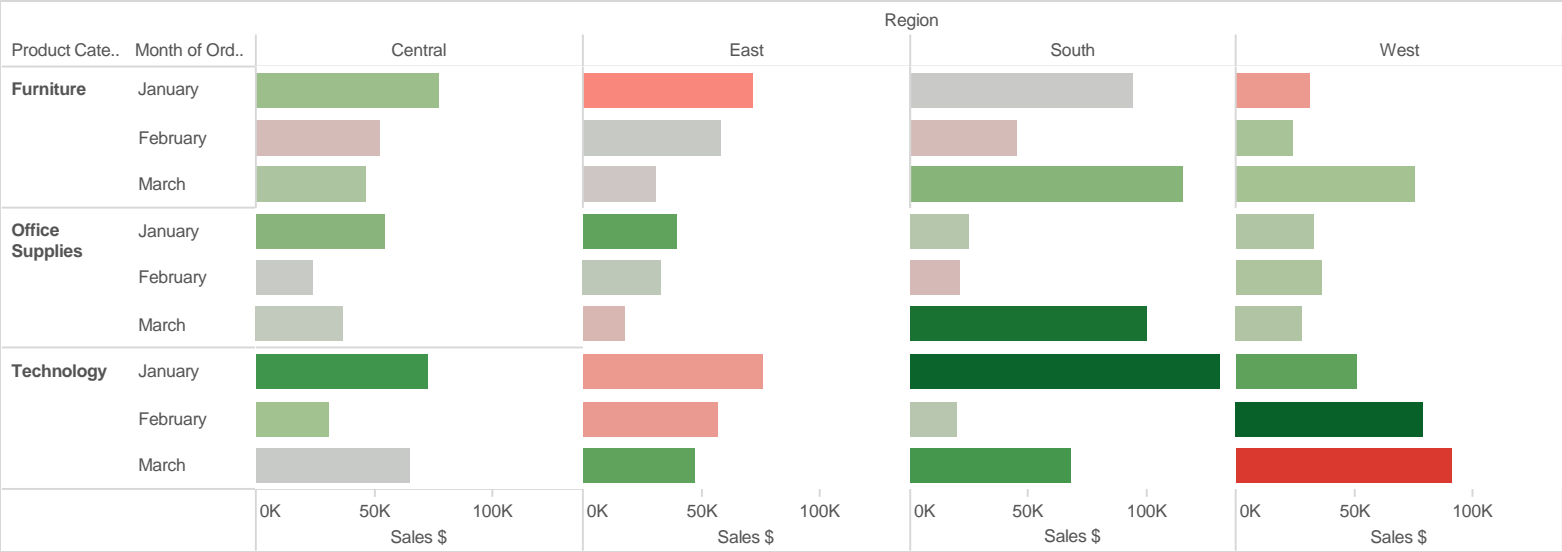
Pulling it all together....

..

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Performance

AGG-1 (16 Records)

	Customer Segment			
Region	Small Business	Home Office	Corporate	Consumer
Central				
East				
South				
West				
	Profit $	Profit $	Profit $	Profit $

Agg-2 (200 Records)

Agg-4 (35k Records)
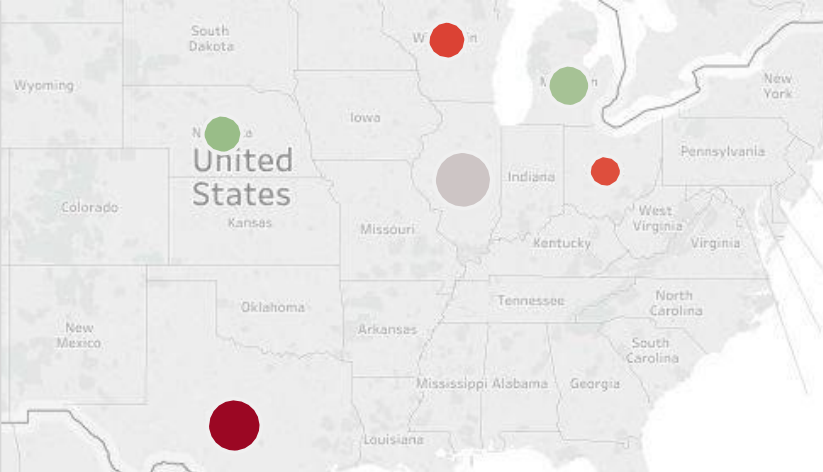
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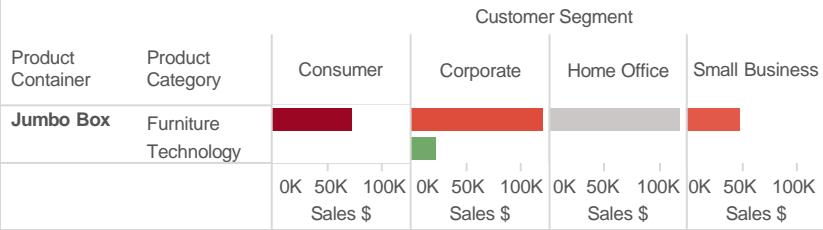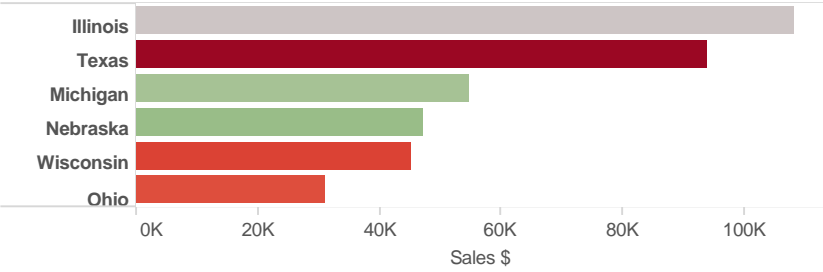
Pulling it all together....

..

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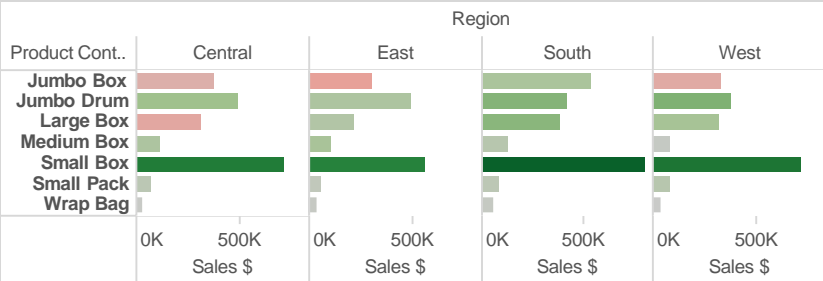
+ableau

Bars - Best for Categorical Comparisons

Region

Legend:
- Consumer
- Home Office
- Small Business
- Corporate

Central	Corporate 900,262	Small Business 288,319	Home Office 487,628	Consumer 435,697
East	Corporate 604,905	Small Business 415,872	Home Office 349,002	Consumer 405,803
South	Corporate 794,716	Small Business 578,077	Home Office 579,859	Consumer 427,098
West	Corporate 538,753	Small Business 397,922	Home Office 472,688	Consumer 532,926

0K 200K 400K 600K 800K 1000K 1200K 1400K 1600K 1800K 2000K 2200K 2400K

Sales $

Line Charts - excellent for showing data over time!

Scatter - different measures, leveraging position, color and shape!

Maps - Take advantage of built-in Demographics!

Sales $
- · 198
- ○ 50,000
- ○ 100,000
- ○ 150,000
- ○ 198,111

Profit $

-11,727   52,787

Per Capita Income
- 11,100 to 25,200
- 25,200 to 28,600
- 28,600 to 31,900
- 31,900 to 36,000
- 36,000 to 84,600
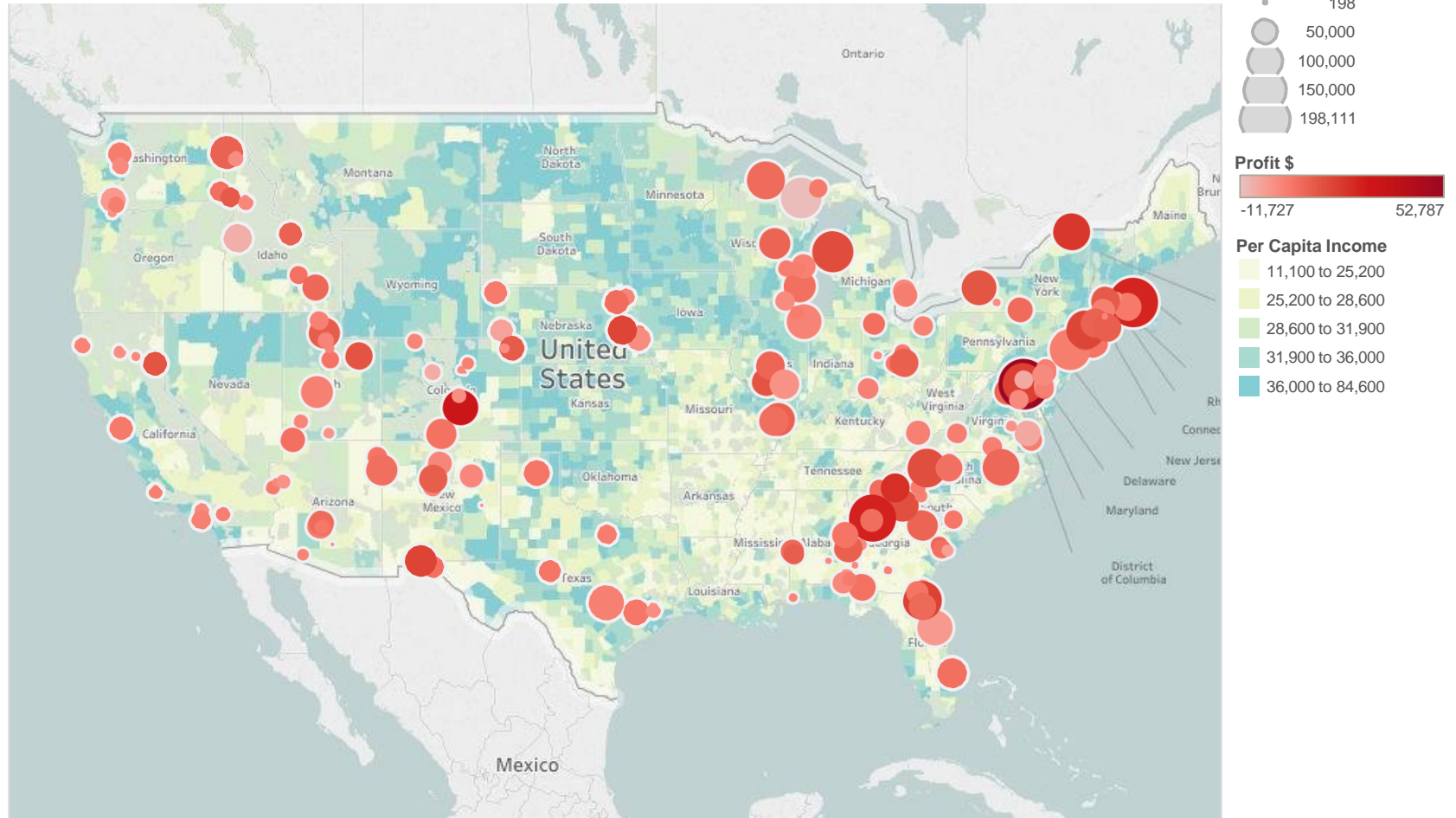
Compare LIKE values (Example Prev Yr Sales versus New Yr Quota
Blue Bar = Sales$.   Black Line = Quota$.
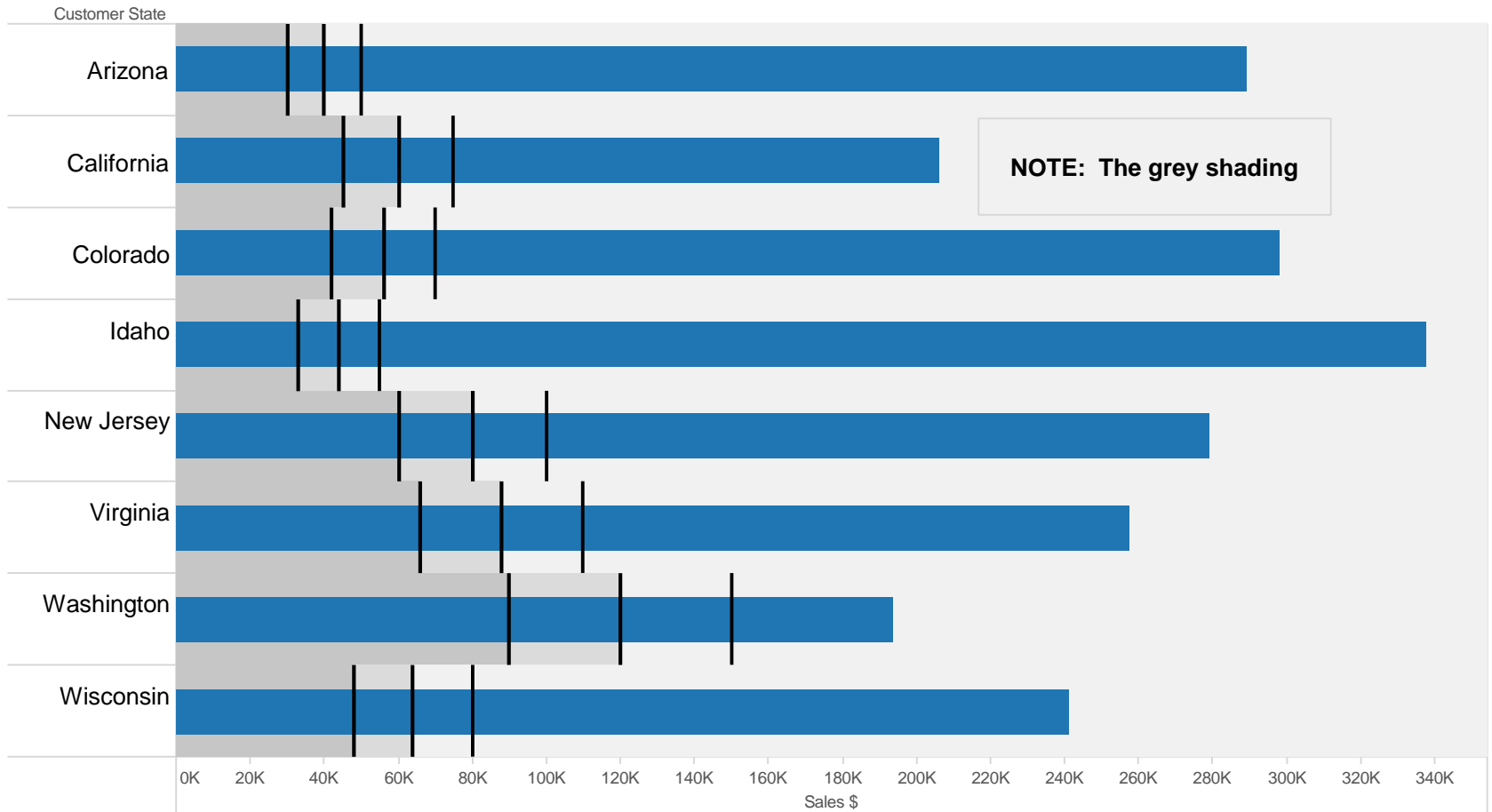
Customer State

NOTE: The grey shading

Arizona
California
Colorado
Idaho
New Jersey
Virginia
Washington
Wisconsin

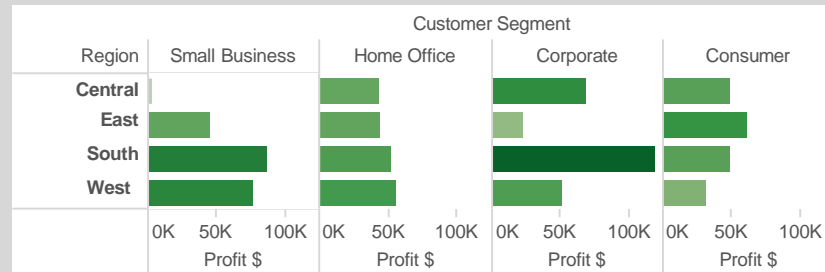0K 20K 40K 60K 80K 100K 120K 140K 160K 180K 200K 220K 240K 260K 280K 300K 320K 340K

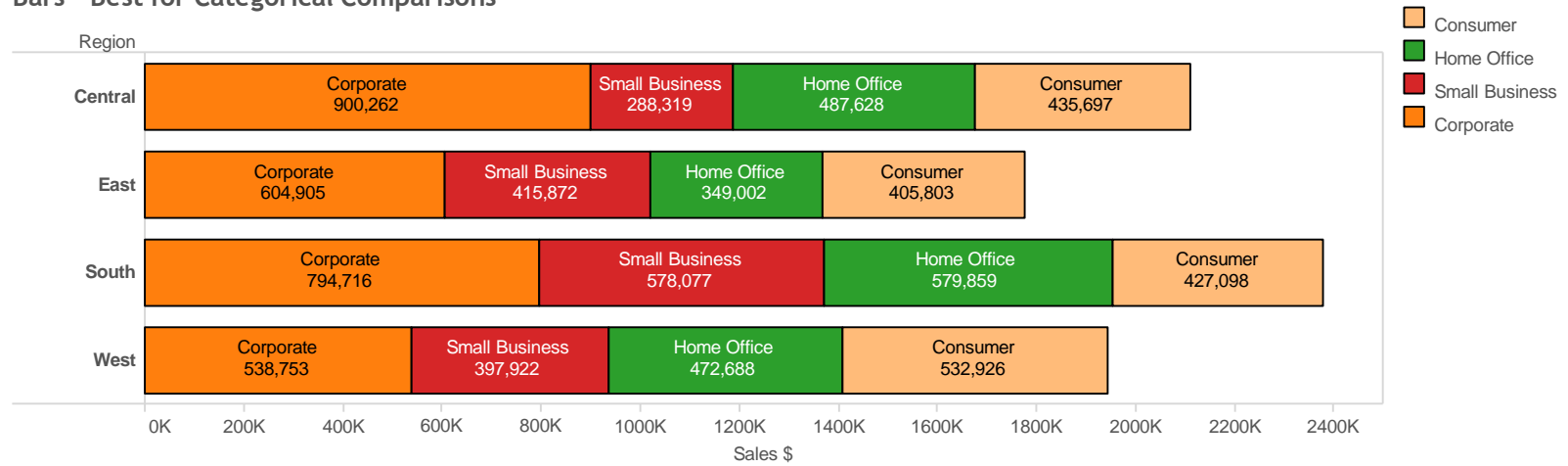Sales $

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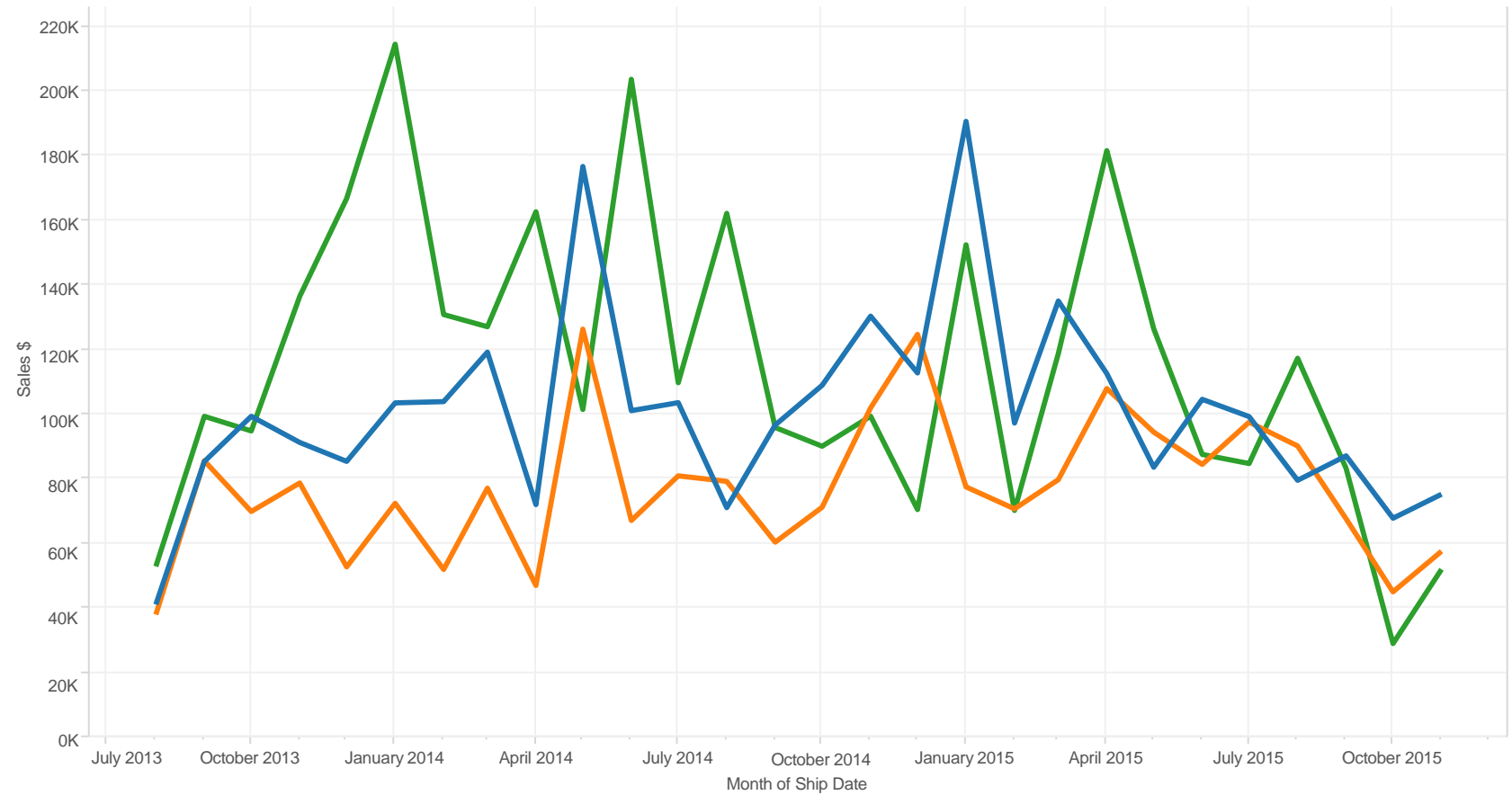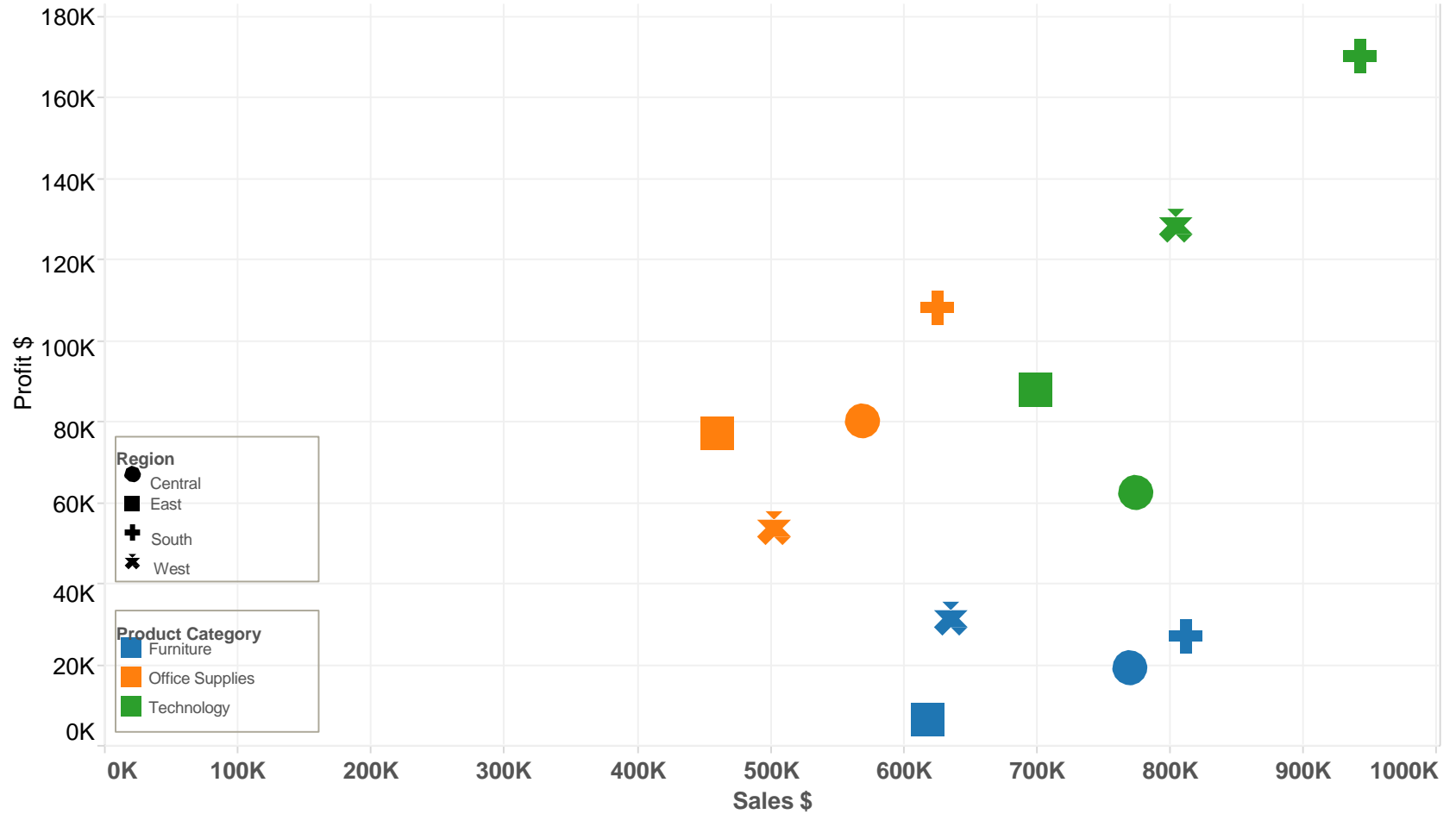
Pulling it all together....

..

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COLOR - Sequential / Gradient colors shows SCALE

Bar chart (Sales $) with categories:
- Appliances
- Bookcases
- Computer Peripherals
- Envelopes
- Paper
- Storage & Organization

Gradient legend: 90,148 — 969,760

X-axis: Sales $ (0K, 100K, 200K, 300K, 400K, 500K, 600K, 700K, 800K, 900K, 1000K)

COLOR - Divergent has some LOGIC
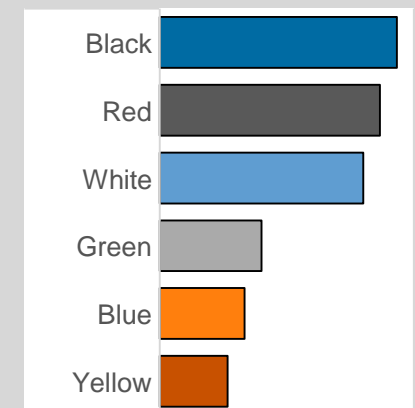
Profit $ legend: -16,560 — 81,067

Region

Sub Category	Central	East	South	West
Bookcases				
Chairs & Chairmats				
Office Furnishings				
Office Machines				
Paper				
Tables				

X-axis each: 0K, 50K — Profit $

Car Colors - Categorical

- Black
- Red
- White
- Green
- Blue
- Yellow

VERSUS....

- Black
- Red
- White
- Green
- Blue
- Yellow

1. How to design a dashboard with a goal in mind.
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3. How to design for best performance.
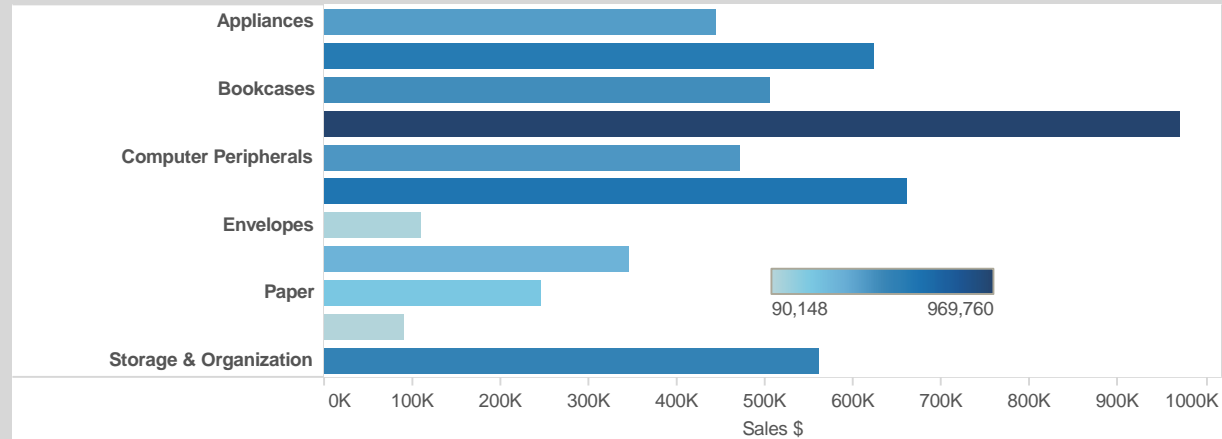4. Which chart type work best, for specific goals.
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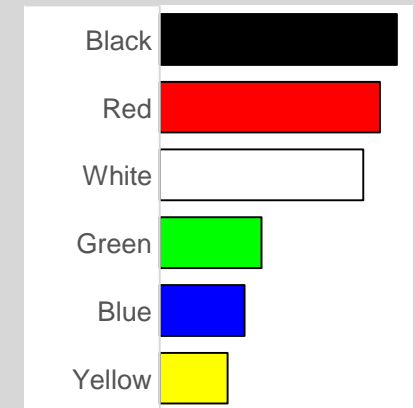10. The two fundamental, guiding principles, for all dashboards.
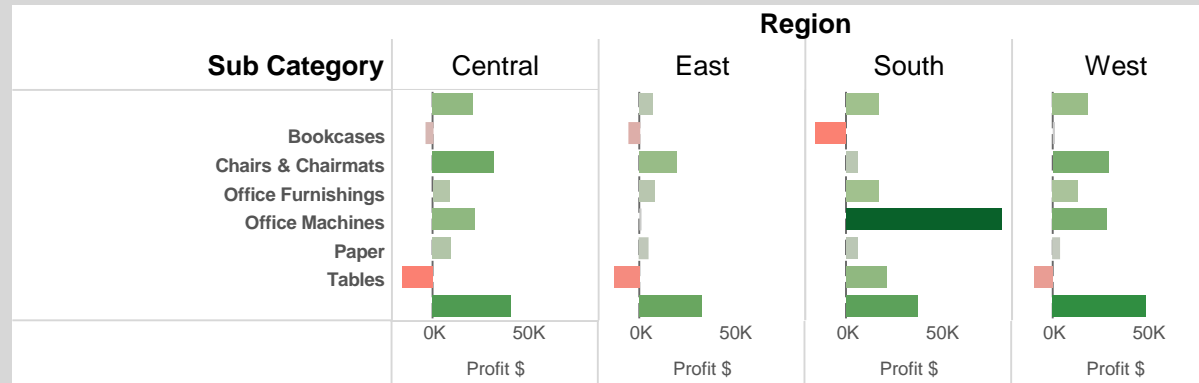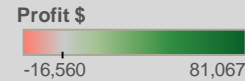
Pulling it all together....

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SENTURUS

+tableau

RED means Profit is BELOW State average.
BOLD means Profit is ABOVE state average.

UPPERCASE means Profit is BELOW state average

Customer State	Discount Rate	Avg. Sales $	Avg. Profit $
Alabama	4.56%	1,818	251
Arizona	4.64%	1,581	191
California	4.90%	1,305	151
Colorado	4.68%	2,057	288
Connecticut	4.74%	1,579	244
Delaware	5.15%	1,653	54
Florida	5.05%	1,671	157
Georgia	4.89%	1,657	208
Idaho	4.98%	1,939	207
Illinois	5.28%	2,022	168
Maryland	4.95%	1,945	338
Massachusetts	5.01%	2,350	232
Michigan	5.17%	1,952	73
Grand Total	4.95%	1,824	197

Highlight text on a dashboard.

..

Uppercase State	Discount Rate	Avg. Sales $	Avg. Profit $
Alabama	4.56%	1,818	251
ARIZONA	4.64%	1,581	191
CALIFORNIA	4.90%	1,305	151
COLORADO	4.68%	2,057	288
Connecticut	4.74%	1,579	244
DELAWARE	5.15%	1,653	54
FLORIDA	5.05%	1,671	157
Georgia	4.89%	1,657	208
Idaho	4.98%	1,939	207
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Pulling it all together....

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SENTURUS   +tableau

Profit $

2,925 — 119,244

Customer Segment

Region	Consumer	Corporate	Home Office	Small Business
Central				
East				
South				
West				

Sales $

Product Category

Customer Segment	Furniture	Office Supplies	Technology
Consumer			
Corporate			
Home Office			
Small Business			

Sales $

Product Container	
Jumbo Box	
Jumbo Drum	
Large Box	
Medium Box	
Small Box	
Small Pack	

Sales $

Down to a Single Query to the Database

Profit $
-12,909   45,016

Product Category	Product Container	Central			Small Business	East			Small Business	South			Small Business	West			Small Business
		Home Consum..	Corporate	Home Office		Home Consum..	Corporate	Home Office		Home Consum..	Corporate	Home Office		Home Consum..	Corporate	Home Office	
Furniture	Jumbo Box	72,019	118,684	119,297	46,804	45,640	70,119	68,279	80,456	62,783	175,972	84,558	118,764	93,695	70,138	79,101	27,601
	Jumbo Drum	38,999	89,417	64,936	74,430	59,304	108,577	19,369	47,887	17,093	80,504	48,293	67,419	68,034	82,176	23,376	46,500
	Large Box	11,292	33,833	14,484	16,523	4,433	21,822	11,127	25,875	8,735	25,468	40,059	4,016	17,544	2,459	46,371	11,409
	Medium Box	6,348	22,996	8,950	2,598	5,309	3,099	14,269	2,501	1,576	15,455	18,503	3,622	13,213	1,798	6,270	13,649
	Small Box	2,408	1,814	4,472	3,094	2,853	4,310	2,784	5,673	2,144	6,297	1,704	1,991	1,955	4,839	3,321	4,026
	Small Pack	1,705	5,849	3,858	1,588	2,796	1,688	2,239	577	1,007	6,089	2,620	4,578	1,638	4,622	1,936	376
Office Supplies	Jumbo Drum		42,276	16,082	14,588	20,294	40,952	32,044	11,791	8,800	8,927	6,444	6,173		18,284	6,840	2,497
	Large Box	15,996	26,103	1,961	1,337	4,409	5,458	4,991	4,109	2,349	11,083	24,902	8,849	9,198	23,833	23,283	3,321
	Medium Box	8,502	3,287	2,349	365		3,746	1,539	91	23,957	3,152	4,797	1,119	2,732	14,849	840	818
	Small Box	111,235	131,630	99,049	54,781	39,793	96,661	85,267	84,814	60,887	146,889	117,134	144,741	94,603	109,201	88,230	70,699
	Small Pack	4,720	11,013	2,364	1,991	2,693	2,496	1,971	3,071	3,776	12,963	2,975	3,883	6,703	1,964	3,800	914
Technology	Jumbo Box		22,741			27,008	3,502	3,699	8,469	14,591	54,354	3,731	17,232	9,172	21,225		29,355
	Jumbo Drum	73,896	46,368	24,723	8,454	44,595	51,937	29,892	26,495	33,200	81,588	29,895	25,752	22,972	55,765	24,662	24,919
	Large Box		140,340	46,985		68,201	42,939		23,281	128,887	3,797	70,183	54,994	64,286	3,378	38,416	75,251
	Medium Box	27,969	19,550	13,970	1,412	9,150	49,490	2,451	17,758	9,200	26,183	6,862	9,012	14,052	5,840	3,231	5,600
	Small Box	46,941	162,799	45,820	48,445	56,075	74,742	51,592	55,027	32,321	100,323	95,376	90,078	87,152	86,676	108,825	59,895
	Small Pack	8,546	11,980	10,017	7,763	4,868	17,563	9,544	10,493	8,785	18,127	9,527	4,904	15,510	15,841	9,943	15,752

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Pulling it all together....

CLICK and Go/Change

Customer Segment

| Region	Corporate	Small Business	Consumer	Home Office
Central	5.12%	5.18%	5.29%	5.10%
East	5.16%	4.69%	4.89%	4.78%
South	4.86%	4.91%	4.92%	5.00%
West	4.83%	4.92%	4.76%	4.88%

Sales $ · Sales $ · Sales $ · Sales $

0K 500K 1000K
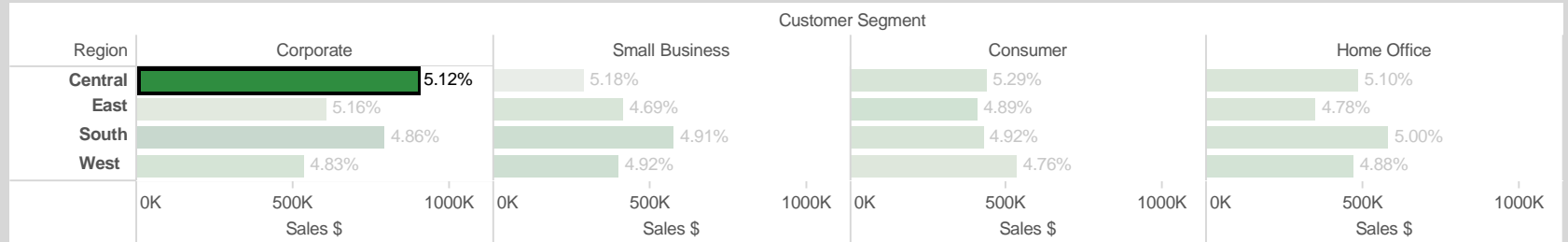
Hierarchical DRILL, and HOVER navigation

Nav3

Region	Customer State	Zip Code
Central	Illinois	60001
		60406
		62444
		62924
	Michigan	48001
		49634
		49822
		49877
		49971
	Nebraska	68001
		68016
		68155
		68717
		68770
		69367
	Ohio	43002

-1K 0K 1K 2K 3K 4K 5K 6K 7K

Profit $
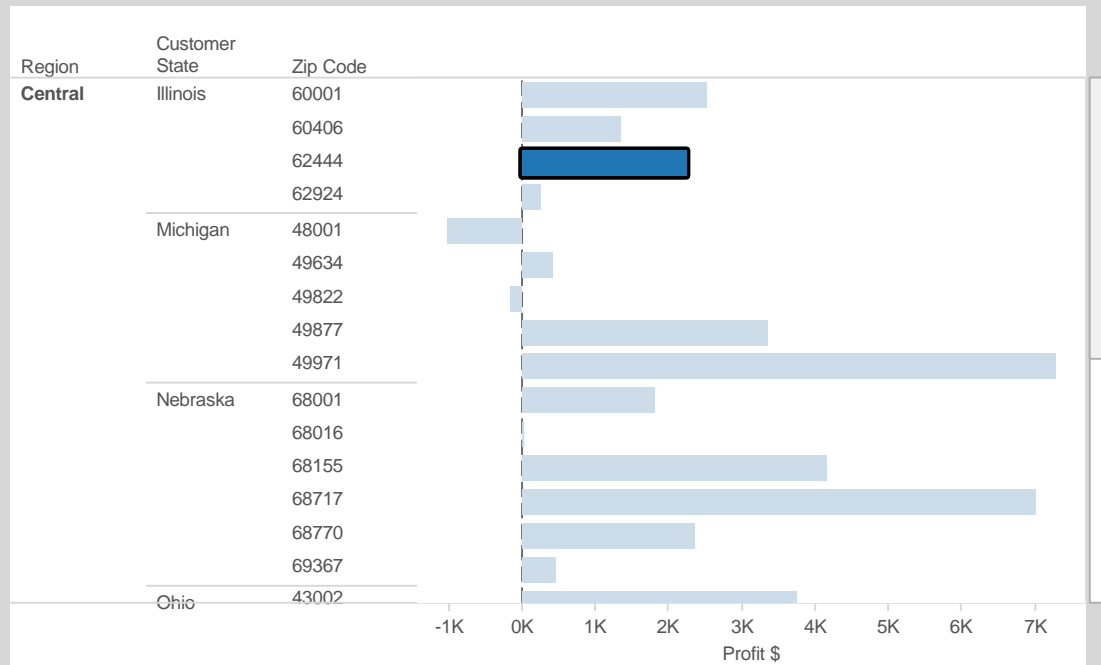
Heat Map - Click a square to see menu options

Profit $
-23,193 ▮▮▮ 36,422

Customer Segment / Region

Product Sub-Category	Consumer				Corporate				Home Office				Small Business			
	Central	East	South	West	Central	East	South	West	Central	East	South	West	Central	East	South	West
Appliances																
Binders and Binder Accessories																
Bookcases																
Chairs & Chairmats																
Computer Peripherals																
Copiers and Fax																
Envelopes																
Labels																
Office Furnishings																
Office Machines																
Paper																
Pens & Art Supplies																
Rubber Bands																
Scissors, Rulers and Trimmers																
Storage & Organization																
Tables																
Telephones and Communication																

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And, the winner is?

Sum of Actual for each And, the winner is?. Color shows details about And, the winner is?.

Reality
And, the winner is?

And, the winner is?	Actual
Me	99.5
Competitor	99.1
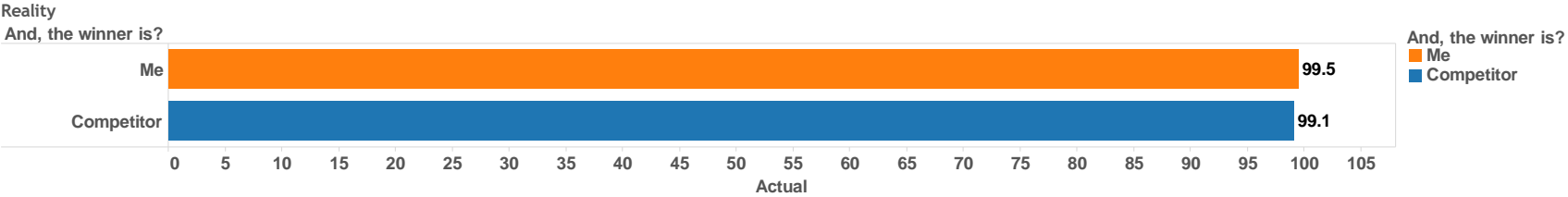
Sum of Actual for each And, the winner is?. Color shows details about And, the winner is?.

Zero Axis

Batch#

Score

Target rd Deviation

Showing:
  Actual
  Target
  Average
  Std Dev
  Pull Level

100
90
80
70
60
50
40
30
20
10
0

1   2   3   4   5   6   7   8   9   10   11   12   13   14   15   16   17   18   19   20   21   22   23
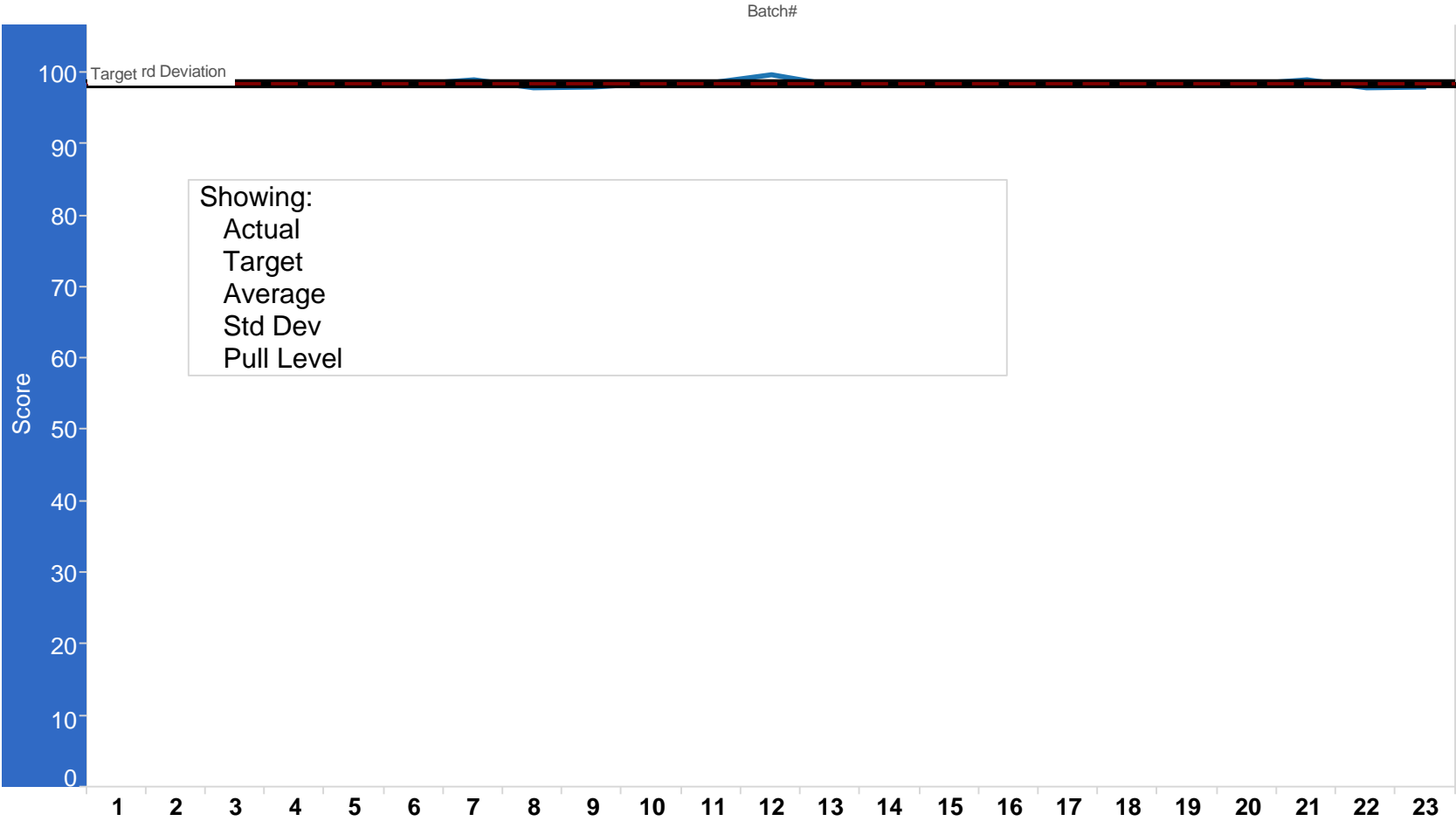
Friends don't let friends use pie charts!!!

The Bad
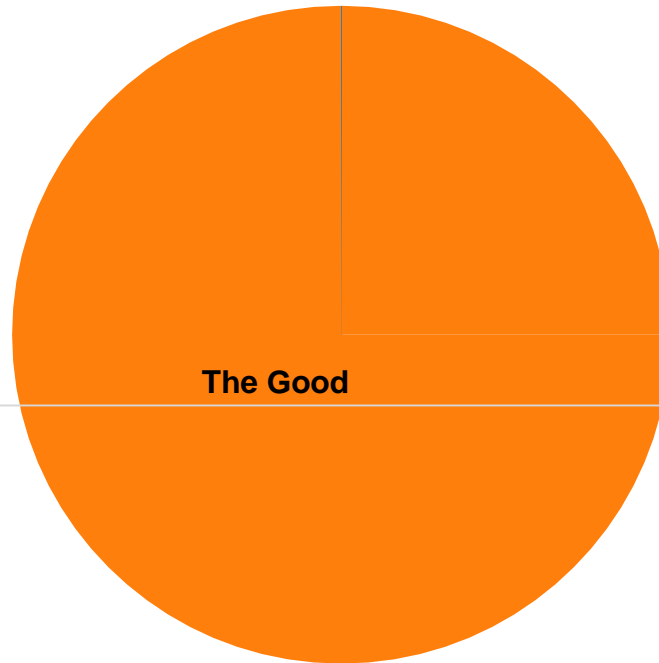
The Good

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Additional Resources

Tableau Server Optimization Assessment

Assessment Itinerary

- Check Tableau Server configuration settings for best practices
- Explore hardware sizing and provide guidance
- Inspect network/hardware configuration and settings for best practices
- Analyze backend data sources and structures
- Analyze a sample set of worksheets and dashboards to troubleshoot performance issues

Deliverable

- Findings and recommendations document pinpointing sources of performance issues

Guarantee

- If Senturus does not find and diagnose the factors creating your performance problems, you don't pay

Cost

$2995

Services are estimated separately for large multi-server Tableau environments
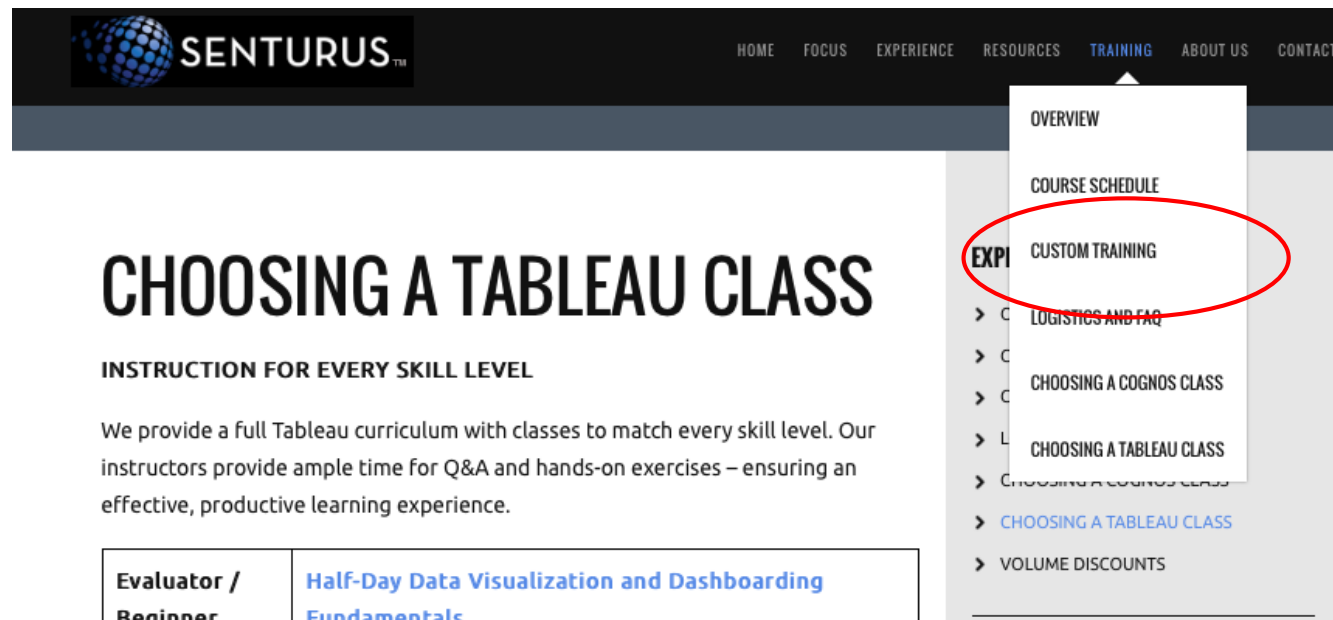
SENTURUS

Tableau Training Led by Expert Instructors

- Beginner, intermediate & advanced courses
- Regularly scheduled online courses
- Private, on-site, custom options

http://www.senturus.com/training/choosing-tableau-class

Upcoming Events

www.senturus.com/events

WORLD OF WATSON COMES TO THE BAY AREA

Thursday, December 8, 2016 - 9:30am - 2:00pm PT - 4.5 hours

WHAT'S NEW IN COGNOS ANALYTICS 11.0.5

DEMOS AND Q&A WITH THE IBM PRODUCT TEAM

Thursday, December 15, 2016 - 10am PT/ 1pm ET - 60 minutes

More Free Resources:
http://www.senturus.com/resources/

Q & A

Thank You!

www.senturus.com
info@senturus.com
888 601 6010

mweinhauer@senturus.com

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