

# University of California Tableau User Group (TUG)

Hosted By:

UC Office of the President

11-18-16

# Agenda

- Welcome/introductions
- A Couple of useful design practices
  - Making dashboards that are irresistible – Tip #2
- Useful tableau resources
  - <https://www.tableau.com/learn/training>
- Great dashboard of the month
  - Cash Balance Summary Dashboard – Tim Wheeler and Irvin Palacios
- Next meeting
- Q & A

## Story First

- **What kind of story are you trying to tell?**
- **How do you get the most important information across clearly and concisely?**

### Think in terms of:

1. **Delivery Channel**
2. **Level of Interactivity**
3. **Timeliness of Data**
4. **Analytical Capabilities**

<http://universityofcalifornia.edu/infocenter/uc-inventions-glance>

<b>Scope</b>	<input type="checkbox"/> <b>Broad:</b> Displaying information about the entire organization	<input type="checkbox"/> <b>Specific:</b> Focusing on a specific function, process, product, etc.		
<b>Business role</b>	<input type="checkbox"/> <b>Strategic:</b> Provides a high-level, broad, and long-term view of performance	<input type="checkbox"/> <b>Operational:</b> Provides a focused, near-term, and tactical view of performance		
<b>Time horizon</b>	<input type="checkbox"/> <b>Historical:</b> Looking backwards to track trends	<input type="checkbox"/> <b>Snapshot:</b> Showing performance at a single point in time	<input type="checkbox"/> <b>Real-time:</b> Monitoring activity as it happens	<input type="checkbox"/> <b>Predictive:</b> Using past performance to predict future performance
<b>Customization</b>	<input type="checkbox"/> <b>One-size-fits-all:</b> Presented as a single view for all users	<input type="checkbox"/> <b>Customizable:</b> Functionality to let users create a view that reflects their needs		
<b>Level of detail</b>	<input type="checkbox"/> <b>High:</b> Presenting only the most critical top-level numbers	<input type="checkbox"/> <b>Drill-able:</b> Providing the ability to drill down to detailed numbers to gain more context		
<b>Point of view</b>	<input type="checkbox"/> <b>Prescriptive:</b> The dashboard explicitly tells the user what the data means and what to do about it	<input type="checkbox"/> <b>Exploratory:</b> User has latitude to interpret the results as they see fit		