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

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