Tableau Dashboard Projects PDF

Tableau dashboard projects help you practise connecting data, building charts, writing calculations and arranging an interactive dashboard. This page gives five briefs: sales performance, HR attrition, marketing campaigns, finance budget versus actual and operations delivery times, each with data fields, the calculations and charts to build, and design and portfolio tips.

Key takeaways

- Start each dashboard from the questions the viewer needs answered.
- Prepare clean data and set data types before building any chart.
- Use calculated fields, parameters and filters for interactivity.
- Keep layout clean: key numbers on top, main chart next, details below.
- Publish to Tableau Public only with made-up or public data.

What is Tableau dashboard projects?

A Tableau dashboard project is a practice build in which you turn a dataset into an interactive dashboard that answers specific business questions using charts, filters and calculated fields.

How should I approach a Tableau project?

Write three to five questions the viewer should answer, such as "Which region is behind target?" Check and clean the data, set types, build one sheet per question, combine sheets into a dashboard, add filters and actions, then test with a friend. Use made-up or public data and state its source on the dashboard. Remember that the numbers in the examples below are illustrations.

Project 1: sales performance

Data: order date, region, category, product, sales, quantity, discount, profit. **Questions:** How are sales trending? Which regions and categories drive profit? Where do discounts hurt? **Charts:** line of sales by month, bar of profit by category, map or bar by region, scatter of discount against profit. **Calculations:** `Profit Ratio = SUM([Profit]) / SUM([Sales])`; a parameter to switch between sales and profit. **Interactivity:** region filter and a filter action from the map to the other charts.

Project 2: HR attrition

Data: employee ID, department, tenure in years, age band, salary band, job level, left (yes or no). **Questions:** Which departments lose more people? Does attrition change with tenure? **Charts:** attrition rate by department, a histogram of tenure, a stacked bar by salary band. **Calculations:**

`Attrition Rate = SUM(IF [Left] = "Yes" THEN 1 ELSE 0 END) / COUNT([Employee ID])`. **Design note:** use anonymised or made-up data and avoid showing individuals.

Project 3: marketing campaigns

Data: campaign, channel, spend, impressions, clicks, leads, customers, date. **Questions:** Which channels give the lowest cost per lead? How do results change over time? **Charts:** bar of cost per lead by channel, line of leads by week, a table of campaign metrics with colour for performance. **Calculations:** `CTR = SUM([Clicks]) / SUM([Impressions])`, `CPL = SUM([Spend]) / SUM([Leads])`. **Interactivity:** date range filter and a highlight action.

Project 4: finance, budget versus actual

Data: month, department, account, budget, actual. **Questions:** Which departments overspend? Is overspending growing? **Charts:** bullet chart or bar with a target line for budget versus actual, a waterfall of variance by department, a trend line of variance. **Calculations:** `Variance = SUM([Actual]) - SUM([Budget])`, `Variance % = [Variance] / SUM([Budget])`. **Design note:** use red and green carefully and add icons or labels so that colour is not the only signal.

Project 5: operations, delivery times

Data: order ID, order date, ship date, delivery date, city, carrier. **Questions:** Where are deliveries slow? Which carriers are late most often? **Charts:** histogram of delivery days, heatmap of average days by city and weekday, bar of late share by carrier. **Calculations:** `Delivery Days = DATEDIFF('day', [Ship Date], [Delivery Date])`, `Is Late = [Delivery Days] > 3`. **Interactivity:** a carrier filter and a tooltip with order counts.

What is a standard build sequence?

1. Connect to the data and check types. 2. Create calculated fields and parameters. 3. Build each sheet and name it clearly. 4. Create a dashboard with a fixed size or a responsive layout. 5. Add titles, short instructions and a data note. 6. Add filters, highlight actions and tooltips. 7. Test with different filter settings and on the screen size you expect. 8. Publish or export.

How should I design the layout?

Place the most important number or chart at the top left, group related charts, use one accent colour and neutral greys, keep fonts consistent and avoid decoration. Limit the dashboard to a few views, give each a title that states a message and leave space between items. Do not use more filters than a viewer will use.

What mistakes should I avoid?

Too many charts, unclear titles such as "Sheet 1", dual axes with unsynchronised scales, pie charts with many slices, filters that break other charts, ignoring performance and publishing data that is not yours.

How do I show the project in a portfolio?

Publish to Tableau Public if the data is public or made up, add a short description of the questions and findings, link the data source and be ready to explain one calculation and one design choice. Add a PDF screenshot for recruiters who do not open links.

How do I check my dashboard before sharing?

Compare each headline number with a simple source calculation, change every filter and see that nothing breaks, read the titles aloud to check that each states a message, test on the screen size of the viewer, check colours for contrast and remove anything that does not answer a question. Ask a colleague to explain the dashboard back to you without help.

Frequently asked questions

What are good Tableau dashboard projects?

Sales performance, HR attrition, marketing campaigns, budget versus actual and delivery times are practical briefs for a portfolio.

Can I publish my dashboard publicly?

Publish to Tableau Public only with made-up or public data, because public dashboards can be seen by anyone.

What makes a dashboard layout good?

Put the key number or chart at the top left, use few views, one accent colour, clear titles and enough white space.

Which calculations should I practise?

Ratios such as profit ratio, rates such as attrition, date differences and parameters that switch the measure.

How many dashboards should I build?

Three to five finished, well-explained dashboards are better than many unfinished ones.

Sources and further reading

- Tableau Help
- Tableau Public

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