Free Training Transcript: Device Designer

Welcome to this video on device designer. You can download the Exercise workbook to follow along in your own copy of Tableau, but device dashboards can only be shared with Tableau Online or Tableau Server.

In today's technology landscape, it cannot be assumed that a dashboard will only be consumed on a standard computer. The Device Designer feature in Tableau takes a master dashboard and lets you preview, and more importantly customize, what that dashboard would look like on a desktop, tablet, or phone.

The Default Layout

When we're working with a dashboard, the side pane shows a size and any sheets available to be used in the dashboard, as well as the dashboard objects. Right now, we're working on the default dashboard. It's important to know a couple things about the default dashboard. The default acts as a template for the other device layouts so they don't have to start from scratch. Only sheets that are put onto the default dashboard will be available for the device-specific layouts. You can remove sheets from a layout, but only what is on the default can be used.

Adding a Device Layout

When we're satisfied that we have everything on the default at we might want, it's time to add a device layout. Click "Device Preview" to bring up the Device Preview Bar. There's the device type, with options including are tablet, phone, default layout, and desktop/laptop. Depending on what device is selected, the model has a list of common models and their dimensions. Note that the models are only intended as a guideline. There's also the option for screen orientation. Usually, tablets are landscape and phones are portrait. Finally, clicking "Add layout" adds a layout for the selected device type.

Customizing Layouts

When a layout has been added, the first decision is the size. Default keeps the size from the default dashboard. Fit all fits all dimensions, like Automatic sizing on the default. Fit width fits the dashboard horizontally, but allows a hard coded height. This means the user would scroll vertically to consume the entire dashboard. We can see the device frame (which depends on the model chosen) to see where content is clipped. A best

practice is to have a "peek" at the bottom of the screen, indicating that there is more content to be seen by scrolling. We'll leave it on Fit all for now.

Next, we can control the layout of the elements on the dashboard. The initial layout is based on the default. If we click custom, we can edit the device layout directly. Note that the menu here for the color legend has an option "remove from tablet" – changes we make on this layout don't impact the default or other device layouts. We only see the content that is on the default dashboard—none of the other sheets in the workbook are available. What about if we wanted to add Monthly Profit Trends?

Adding Content

To access more vizzes on this tablet layout, we need to add them to the default first. Click back on Default up at the top brings us to the master layout. We can bring out our Monthly Profit Trends, and if we go back to Tablet, we see that sheet is available on the side pane. It wasn't automatically added to the layout because we've already started customizing. Clicking Default reverts all changes and re-syncs this tablet layout with the default layout—now we can see how that default is essentially a template. We got the trends viz added, but we lost what we did with our color legend. Let's undo that, and simply drag out monthly profit trends. We can change how our filter is displayed, and let's make our map a big bigger.

Ok, this seems to be about what we want. Let's see how it looks on other types of tablets. Clicking through the model shows us the preview for various tablets. Do note that model device frames are estimates: Additionally, the device preview may not account for the app chrome or toolbars, so make sure to allow for that space. Final visuals may be different once the dashboard is published and viewed on that device, so it's always good to check the published dashboard on relevant devices.

Adding More Device Layouts

We're happy with our tablet layout, but we know people will want this dashboard on phones, too. To add another layout, select the device type, here we'll pick Phone, then click Add Layout. We now see Phone under Default layouts at the top. We can set the size to fit width, click Custom so we can edit: remove the trend lines, and move the map down to the bottom, and adjust the size. And now we have a version of this dashboard that will work well on a phone. Note the default layout will be served up for any device that

doesn't have a specified layout.

Conclusion

Thank you for watching this video on designing dashboards for devices. We invite you to continue with the Free Training videos to learn more about using Tableau.