Collaborating with data in Tableau

How might we support collaboration in the process of data analysis and visualization?

OPPORTUNITY
Tableau helps people see and understand their data. We wanted to improve the tools for collaboration between people who create visualizations in Tableau, dashboard authors, and the people who use them, consumers.

FINDINGS & SOLUTION

1. Consumers don’t know what they can do in the dashboard.
   - **User-Interface Tour**
     Introduces users to the Tableau dashboard interface elements and empowers them to answer questions by interacting with the data visualizations.

2. Authors want to guide consumers through the primary insights in the data.
   - **Narrative Tour**
     Helps users understand the insights in the data and gives the visualization author a powerful tool for providing context and clarification about the data and its story, thereby improving consumer confidence in it.

3. Consumers and authors communicate back and forth via email and not within the dashboard.
   - **Communicate in Context**
     Provides robust commenting between dashboard consumers and authors with the ability to leave comments in specific areas of the dashboard so the author knows what is being referenced.

PROCESS

**Discovery**
Consumers of dashboards aren’t sure how to use Tableau. Authors want to guide consumers through analysis. Communication happens outside Tableau.

**Ideation & Design**
After several iterations, our final design focuses on educating new users, giving authors a way to narrate key insights, and allowing users to communicate in context.

**Evaluation**
We found the UI tour empowers new users to engage more, control of a separate narrative tour is important, and communication within Tableau is more efficient.