

# Dashboard Collaboration for Tableau

## Transforming Tableau dashboards into a collaboration hub

### Summary

At the heart of data driven organizations lies the concept of data democratization: making data more accessible to everyone and making it easier to share, discuss, and act upon. Data visualization tools like Tableau help companies view, understand and leverage their data to make better decisions about their business.

Our client, one of the world's largest manufacturers of medical devices, pharmaceuticals and consumer goods wanted to make its data more accessible and easier to comment on. It approached Starschema to help their sales team comment directly in Tableau, its data visualization tool, so dashboards could become an interactive collaboration hub. Our client defined success as the sales team commenting directly on Tableau dashboards, and reducing or eliminating the use of PowerPoint.

### Challenge

Already a Tableau customer, our client recognized the benefits of data visualization, but was challenged by finding an effective way to communicate insights and gather feedback. Its sales teams used PowerPoint slides and email to present, view and discuss sales results. This traditional method of sharing insights was difficult to manage, unreliable and inefficient. Important information was often buried in email chains or multiple versions of long slide decks.

To improve their team's ability to gain faster, better insights, the client implemented a pilot program to transform dashboards from merely a way to view data into a hub of actionable collaboration. The size of the Tableau environment added a level of complexity to the solution. Any solution would need to support enterprise requirements.

### Practice Area

Data Visualization

### Challenges

- Lack of effective collaboration
- Inefficient, difficult to manage data review and commentary process

### Business Impact

- Increased feedback from sales teams on data
- Near elimination of Power Point and email as collaboration method

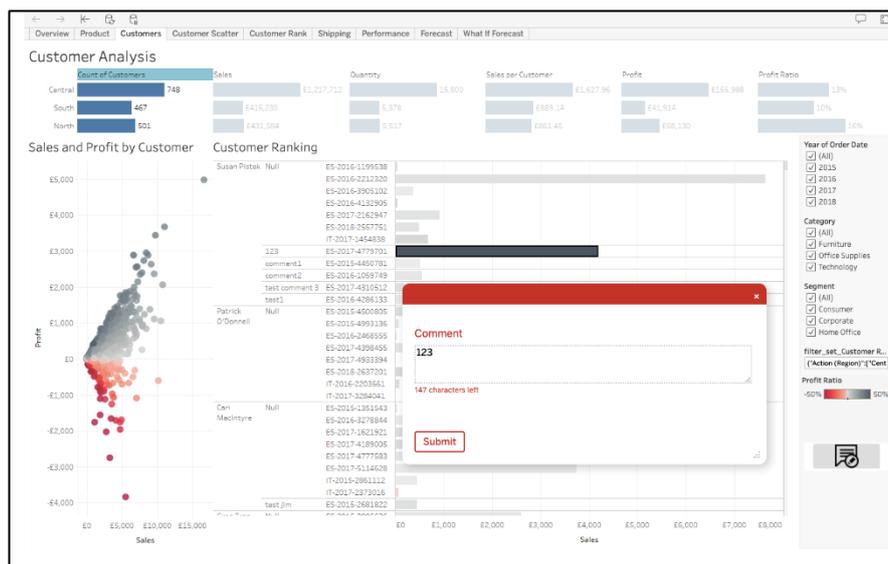
### Technologies

Tableau

## Solution

The team charged with running the pilot chose Starschema's Dashboard Commentary Tool. This extension transforms Tableau dashboards into interactive hubs for collaboration, discussion and decision making. The benefits of the extension are wide-ranging:

- Additional context from annotating complex aggregated and raw data along with its dimensions.
- Complete history of comments for audit or backup purposes.
- Only one external database required to record comments — your data never leaves your premises.
- Integration with enterprise authentication systems (SAML or SSPI Single Sign-On) using Company Directory and user groups to set permission levels – admin, commenter or viewer — for individual workbooks.
- Commenting done via modal window — similar to a pop-up window within the browser — saving dashboard space.
- Admin UI allows configuration of commentary modal window size as well as individual configuration of comment fields, field name, comment type, character limits and character appearance.
- Four different ways to comment: text box, radio button, checkbox and dropdown item selection.
- Works in locked-down environments where creating tables on the fly in test and production environments is not an option.



## Results

Our client enabled its sales team to comment directly on the dashboard, eliminating the need for lengthy PowerPoint presentations or hard-to-find e-mail chains to share data insights. Over a single quarter, the entire sales team adopted the tool, and the use of legacy sharing methods – PowerPoint, screenshots or e-mail – was reduced by 95%.

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