

ANALYTICS & BI · FREE CHECKLIST

Dashboard Review Checklist

A structured post-build review that tells you whether a dashboard is ready to release — and exactly what to fix if it is not.

What it is	A 31-point review across seven areas, each item tagged by severity, ending in a release recommendation based on a stated rule.
Who it is for	BI analysts and developers reviewing their own or a colleague's dashboard after build and before release or major change.
How to use it	Fill in the review details, open the dashboard as the audience would (their role, device and connection), then mark every item Pass , Fix or N/A and note the evidence or the fix. Total the findings on the last page and apply the decision rule. Fillable on screen in any PDF reader that supports forms, or print and complete by hand.
What it produces	A release recommendation (Ready · Ready with conditions · Not ready) and a prioritised fix list with owners. The recommendation informs the release decision; it is not the decision. The dashboard owner records that decision separately.

Review details

Dashboard name		Version / link	
Author / owner		Reviewer	
Review date		Review type	Select...
Primary audience		Tested as role / device	
Decision or question it supports			

Severity and the decision rule

Severity	Meaning	If marked Fix
Blocker	Wrong, misleading or insecure: users could make a bad decision or see data they should not.	Must be fixed before release.
Major	Materially reduces trust, comprehension or usability for the intended audience.	Fix before release, or release with a dated fix condition.
Minor	Polish that improves clarity or maintainability.	Log and fix in the next iteration.
Decision rule	Not ready if any Blocker is marked Fix. · Ready with conditions if no Blocker is marked Fix but one or more Majors are — each with an owner and date. · Ready if no Blocker or Major is marked Fix. An item left unanswered means the review is incomplete : do not issue a recommendation.	

Severity reflects typical impact. If an item clearly matters more or less for this dashboard, you may change its severity — record why in the note.

A	Purpose and audience	Severity	Pass	Fix	N/A	Evidence or required fix
A1	States the question or decision it exists to support Title, subtitle or header names the decision/question; you can say in one sentence who uses it to decide what.	Blocker	☐	☐	☐	
A2	Content is pitched at the intended audience Terms, granularity and level of detail match the named audience, not the builder.	Major	☐	☐	☐	
A3	The most important information is visible first Key measures are visible on load, top-left, without scrolling, clicking or hovering.	Major	☐	☐	☐	
A4	Every visual earns its place Each chart answers part of the stated question; remove any that only decorate or duplicate.	Minor	☐	☐	☐	
B	Data trust and accuracy	Severity	Pass	Fix	N/A	Evidence or required fix
B1	Headline figures reconcile to the agreed source of truth Check 2–3 headline numbers against the system of record or a finance-approved report for the same period.	Blocker	☐	☐	☐	
B2	Default filters and date range are correct and visible Open fresh as a new user: the defaults match the stated purpose and are shown on screen.	Blocker	☐	☐	☐	
B3	Totals stay correct under filtering Apply at least three filter combinations; totals, averages and percentages still reconcile.	Blocker	☐	☐	☐	
B4	Metric definitions are available Each measure has a definition (tooltip, info panel or linked glossary) matching the governed definition.	Major	☐	☐	☐	
B5	Data freshness is shown 'Last refreshed' date/time is visible and correct.	Major	☐	☐	☐	
B6	Missing data is visible, not hidden Nulls and missing periods are not silently shown as zero or dropped from trends.	Major	☐	☐	☐	
C	Visual encoding	Severity	Pass	Fix	N/A	Evidence or required fix
C1	Chart types fit the comparison being made Trend → line; ranking → sorted bar; part-to-whole with few parts → stacked bar; relationship → scatter.	Major	☐	☐	☐	
C2	Axes do not mislead Bar and area charts start at zero; truncated line axes are labelled; no unlabelled dual axes.	Blocker	☐	☐	☐	
C3	Comparable charts share scales Small multiples and side-by-side charts use the same axis range unless clearly labelled.	Major	☐	☐	☐	
C4	Colour carries meaning consistently Same colour = same thing everywhere; highlight colour used sparingly for what matters.	Major	☐	☐	☐	
C5	No distorting chart forms No 3-D effects; pies only for 2–4 parts; no gauges where a bullet or bar would compare better.	Major	☐	☐	☐	
C6	Numbers are formatted for reading Units shown; sensible rounding; thousands separators; consistent decimals.	Minor	☐	☐	☐	

D	Layout and narrative	Severity	Pass	Fix	N/A	Evidence or required fix
D1	Reading order follows the decision Summary → drivers → detail; related items grouped; alignment and spacing consistent.	Major	☐	☐	☐	
D2	Numbers have context Targets, prior period or benchmarks shown where a value alone cannot be judged good or bad.	Major	☐	☐	☐	
D3	Titles say what to look at Chart titles state the question or insight, not only the field name.	Minor	☐	☐	☐	
D4	Clutter is removed Heavy gridlines, borders, redundant legends and labels removed; whitespace used to group.	Minor	☐	☐	☐	
E	Interaction, performance and security	Severity	Pass	Fix	N/A	Evidence or required fix
E1	Users only see data they are permitted to see Test as two audience roles: row-level security and permissions behave as designed.	Blocker	☐	☐	☐	
E2	Filters and drill-downs behave as labelled Every filter does what its label says; reset is obvious; drill paths return correctly.	Major	☐	☐	☐	
E3	Loads within the agreed time Time first load and a typical filter change on the audience's usual connection; compare with the agreed target.	Major	☐	☐	☐	
E4	Works on the audience's device and screen Check at the screen size and device the audience actually uses (e.g. laptop, tablet).	Major	☐	☐	☐	
F	Accessibility (informed by WCAG 2.2)	Severity	Pass	Fix	N/A	Evidence or required fix
F1	Text contrast is sufficient Body text at least 4.5:1 against its background (3:1 for large text) — check with a contrast tool.	Major	☐	☐	☐	
F2	Chart marks and key UI parts are distinguishable Lines, bars and controls at least 3:1 against adjacent colours (non-text contrast).	Major	☐	☐	☐	
F3	Information is not conveyed by colour alone Status and series also use labels, icons, patterns or position (test in greyscale).	Major	☐	☐	☐	
F4	Alternatives exist for non-visual use Charts have descriptive titles/alt text or an accessible data table; keyboard navigation works.	Minor	☐	☐	☐	
G	Ownership and maintenance	Severity	Pass	Fix	N/A	Evidence or required fix
G1	A named owner and support route are shown Owner and how to report a problem are visible on or linked from the dashboard.	Major	☐	☐	☐	
G2	Refresh is scheduled and failures alert someone Refresh schedule set; a failed refresh notifies the owner rather than showing stale data silently.	Major	☐	☐	☐	
G3	It is catalogued with a review date Listed in the catalogue/portal with purpose, owner and a date to review continued use.	Minor	☐	☐	☐	

Findings and recommendation

Count the items marked **Fix** by severity, check nothing is unanswered, then apply the decision rule. There are 31 items (6 Blockers).

Items marked Fix	Blocker	Major	Minor	N/A	Unanswered
Count					

Review recommendation

☐	Ready	No Blocker or Major marked Fix.
☐	Ready with conditions	No Blocker marked Fix; Majors have owners and dates below.
☐	Not ready	One or more Blockers marked Fix.

Fix list — Blockers first, then Majors

Item	Fix required	Owner	Due	Done
C2	[EXAMPLE] Revenue bar chart axis starts at 80k — reset to zero and relabel.	[EXAMPLE] A. Rowe	[EXAMPLE] 12/11	
				☐
				☐
				☐
				☐
				☐
				☐
				☐

The shaded row is a fictional example of the expected level of detail — leave it as it is; it is not part of your findings.

Sign-off — two separate stages

The reviewer recommends; the dashboard owner decides. Keep the two distinct so a review is never mistaken for release approval.

Stage	Name and role	Date	Comment / conditions accepted
1 Review completed (reviewer)			
2 Release decision (dashboard owner)			

Notes on method: severity levels and checks reflect widely used dashboard-design and data-visualisation practice; accessibility checks are informed by WCAG 2.2 success criteria 1.4.1 (use of colour), 1.4.3 (contrast minimum) and 1.4.11 (non-text contrast). This checklist does not certify WCAG conformance.