Report- and dashboard design

Best practices for report and dashboard development

With vendor's pushing out first in class reporting tools, it becomes more and more easier for (business) user to drag-and-drop and create a report or dashboard in just a few clicks. The challenge with these kind of user friendly report tools is to strike a balance between creativity and information delivery. The best practices addressed below provide a comprehensive but practical framework for developing reports that make sense and that are up to the task on hand.

User Interaction Design

Impress or inform?

With reporting most report developers are mostly concerned with the look and feel of their deliverable. while this goal is to impress is legit in case in external communication material and info-graphics. this most certainly is not always the case for internal reporting purposes. That's why the first thing that needs to be cleared out is whether the goal is to to impress or to inform. In this contex the report or application is just a means to an end adn nto the end.

Location, location, location!

The placement of information is crucial for getting the attention deserve from the end-user. After all, who want's to spend time looking at chaos! Therefore make sure the right chunk of information is placed on the right place.

Futhermore humans give different sections of a screen different level of attention. For instance, in the western world where the reading direction is from left to right, the top left area of the screen gets the most attention compared to the other parts. Being aware of this fact, one can apply this fact by placing the most important information on the top left area of the screen.

Let's KISS

Keept It Simple Stupid is the slogan here! To ensure the report or application is accesssible for the end-user, the interactions should be kept as simple as possible. Aim for a consistent look and feel and also consistent interactions. For example aim to use the same color for actual measures in all your reports or always use the same interaction to apply filtering. Harmonizing the look and feel and the user interaction will allow the end-users to focus on the information instead on how to read and use the repor.

Information Delivery

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Data vizualization is an effective means to transfer information compared to for example plain text. That is because of human cognition: the human brain can process 2D shapes far more effective than say text. Therefore in cases of providing the "big-picture" or for qualitative comparisons data visualization is the recommended way to present information. Even then, the appropiate data visualizations need to be employed to ensure readability. For trend analysis use line charts to visualize the shape. For comparison use bar chart where the length of the bar reflects the respective value.

Find it in tables

Tables are superieur for looking up exact values for presenting facts. Tables present the information in text and can therefore can provide decimal accuracy. By applying consistent and smart formatting the readability of tables can be ensured. For example right alignment of measures so the length of figure already gives an indication of the value compared to another value. Or use white spaces instead of prominent gridlines to demarcate rows and columns.

Text is king

Text is fundamentally indispensible in communication and thus also in reporting. In languages, words are given a complexity of meaning. In addition the meaning can vary depending of the context. Therefore for accurate and exact information distribution text is king!

To ensure readability the same principle as with tables apply: consistent formatting and typeface choice are key. Choose a font type that is easy readable either on screen or on printable medium. Furthermore ensure enough contrast with the background to make it easy to read.