Fonseca Data Science
Analytics and Data Visualization

DataViz Checklist

I first shared this Checklist at the San Francisco Bay Area Tableau User Group on April 24, 2014. Before sharing your Viz, consider reviewing it for those particular details that make a good viz great. Here's a starter checklist for you that hits some key items I like to review before publishing a viz. I encourage you to add to this list and even grab a friend or colleague for a quick review. You've invested your energy and passion to create something meaningful--a visual story--so take the time and check the details to make it great.

Your Viz

❑ Is your viz answering a specific question or addressing a specific line of inquiry? Is it clear from your title and headers what you're trying to reveal?

❑ Check all view titles. Are they descriptive and in natural language? Are they necessary? Could you use Parameter data to make the title more meaningful?

Layout / Design

❑ Review your chart type. Is this the best way to display your data? Is there another view that would be more revealing?

❑ Limit font choice to those that display well in all browsers and to 3 fonts and 3 colors where possible.

❑ Does your viz have whitespace/borders to focus your viewer's attention the data rather than looking off page?

❑ Is the layout size optimized for your viz? Be cautious about leaving it to size automatically. Consider setting a range if needed or set the size for visual precision.

❑ Print or publish your viz to test the output. If publishing online, check multiple browsers. Firefox does interesting substitution with fonts and can sometimes truncate copy in your text box.

Dimensions & Measures

❑ Are all field names human readable? Don't leave those DB names with underscores — it looks unfinished.   Someone may download your workbook and you want the data to be clear regardless of whether it's on your published view. Consider hiding unimportant fields.

❑ Check your calculations. Did you aggregate correctly? Is the right default aggregation set for each measure?

❑ Check your default sort order. Example, Olympic medals shouldn't be in alphabetical order. Alphabetical is the default sort order for dimensions and yet we know that this is not necessarily the case with categorical data.

Axes & Labels

❑ Did you leave the defaults? Is your number format set to a meaningful scale? (ex., aggregate to K or M if only dealing with large numbers).

❑ Do you have a meaningful axis label? Is the label redundant with your title?

Filters, Actions & Parameters

- ❑ Is the call to action clear?
- ❑ Does the default value make sense?
- ❑ Do they work as expected? Test them thoroughly. The more complex your viz (especially if you're using Table Calculations) the more likely you could find unintended outcomes.

ToolTips

- ❑ Do they tell a story? Are you using natural language?
- ❑ Are they necessary? Remove tooltips from views where they add no value.
- ❑ "Number of Records"? Really? If you are using Number of Records tell your viewer what you are counting.
- ❑ Are all tooltips in the same font and color scheme? Have you kept it simple?
- ❑ Is there any additional info you could include that would make the store more meaningful?

Maps

- ❑ Do you need to apply washout to keep the focus on your data?
- ❑ Have you removed any unnecessary map layers? (Example, turn off borders and labels if they are creating visual clutter).

What else could you add to this list to improve your viz before it goes out?