

SaaS dashboard UX teardown checklist

For each item, record Pass, Issue, Not tested, or Not applicable. Link every Issue to a finding ID and explain Not applicable decisions. A checklist completion rate is a coverage measure, not a product quality score.

1. User goals and scope

Check all that apply.

- ☐ One primary role, decision, and success condition are documented.
- ☐ Permissions, tenant, product version, and review environment are recorded.
- ☐ Core scenarios have realistic data and known correct outcomes.
- ☐ Research evidence and reviewer assumptions are distinguished.

2. Hierarchy and navigation

Check all that apply.

- ☐ The initial view prioritizes information relevant to the selected role.
- ☐ Important exceptions are distinguishable from routine information.
- ☐ Labels and grouping make the reading order understandable.
- ☐ Users can move from the overview to supporting records and back.

3. Metrics and charts

Check all that apply.

- ☐ Important metrics have accessible definitions and units.
- ☐ Reporting periods, timezones, and comparison baselines are clear.
- ☐ Freshness and incomplete data are identified where relevant.
- ☐ Missing, unavailable, and zero values are distinguishable.
- ☐ Chart types, scales, aggregation, and labels support accurate interpretation.

4. Filters and actions

Check all that apply.

- ☐ Active filters and their scope remain visible or readily discoverable.
- ☐ Combined filters behave consistently across affected components.
- ☐ Returning from details preserves the context needed for the task.
- ☐ Users can clear individual filters and reset the view intentionally.
- ☐ Insights connect to an appropriate next action.
- ☐ Exports and shared views communicate scope and permission differences.

5. System states and accessibility

Check all that apply.

- ☐ Empty accounts and no-result states explain the next step.
- ☐ Loading, stale data, partial failure, and recovery are distinguishable.
- ☐ Restricted actions explain access limits and available alternatives.
- ☐ Core tasks can be completed using a keyboard with visible focus.
- ☐ Text and necessary graphical information meet applicable contrast requirements.
- ☐ Status and chart meaning are available without color alone.
- ☐ Screen-reader access, zoom, and relevant viewport sizes are tested.

6. Findings and follow-through

Check all that apply.

- ☐ Findings include reproduction steps and evidence references.
- ☐ Severity, confidence, reach, and effort are recorded separately.
- ☐ Each accepted change has an owner and acceptance criteria.
- ☐ The validation plan defines both task accuracy and completion.
- ☐ Unresolved questions and untested areas remain visible.

7. Select checklist date

Example: January 7, 2019

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