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

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Example: January 7, 2019