

Data Tables UX Checklist

This is a companion to our deep dive article on Data Tables published on pencilandpaper.io.



A **table view** includes the data table as well as the surrounding parts (ex. filters, header, actions).

🤔 COMMON ISSUES

- Defaults don't make sense for the personas
- Too much info is presented by default
- Too many unnecessary (or not enough!) actions available to users on a specific view
- The available viewing controls do not sufficiently serve the needs of the personas

😎 SUCCESSFUL TRAITS

- Strikes the right balance of data presented and available actions for the persona(s) it serves.
- It looks friendly, not overwhelming, intimidating or subject to misinterpretation
- The default state makes sense for the use case
- The performance doesn't lag

TYPES OF TABLES

👉 Action Oriented

Emphasizes actions, and may be linked directly in a workflow.

PRIORITY

★ Clarity around executing actions

TRAITS TO STRIVE FOR

- Efficiency in **executing actions** (single or batch)
- **Obvious UI feedback** indicating success or failure after action is executed
- Visual **guidance** to which rows need to be acted on

🕶 Info Oriented

Hold large datasets, with users demonstrating rich information seeking needs and behavior.

PRIORITY

★ Visual clarity & ability to find results

TRAITS TO STRIVE FOR

- Strong **visual hierarchy**
- Solid **structure, information architecture** and **data quality**
- Rich functionality around **information seeking experiences** that allow users to work with the data

👤 Super User

Require depth of complexity for viewing, filtering, multiple and actions.

PRIORITY

★ Facilitate efficient but dynamic use of powerful functionality

TRAITS TO STRIVE FOR

- A **combination of action and info oriented traits** that are relevant to the needs of the view
- Additional clarity around **what actions or functions** are available
- Saved custom layouts / views

Checklist Pg 1

Use these prompts to help you think about your table views with fresh eyes. If they don't apply to your context, skip to the next one. Give yourself a checkmark when you say "yes" to each prompt.

PAGE SHELL

High level standards for the page itself

- ☐ Is it clear what the page is about, even if you've arrived at this page directly?
- ☐ Is it clear what the most important action is, even before the user has interacted with the page?
- ☐ Is there a default state assigned for different personas?
- ☐ Will a user who's confused or stuck be able to find information or context on what to do next?

TABLE DATA

The information presented within your table

- ☐ Are over 50% of the columns shown by default relevant to the personas looking at this page?
- ☐ Does the order of data make sense?
- ☐ Are the values under each column unique and avoid duplication and/or redundancy?

Values in the table

- ☐ Do the actual values within your table tell a cohesive story?
- ☐ Are long values handled by well known acronyms or other opportunities for shortening/truncation?
- ☐ Are system generated values explained with a tooltip?

Tip: Watch out for blank, null, or other values that can cause confusion. These issues can be a sign it's time for a conversation about data quality and utility for users.

INFORMATION ARCHITECTURE

The way the table is built and organized

- ☐ Does the title of the page itself make sense universally?
- ☐ Are the verbs used for actions (ex. export, save, remove) familiar compared to known patterns out there?
- ☐ Are the column header titles universally understandable?
- ☐ Are obscure/niche column header titles described further with tooltips or other mechanisms on the page?

TABLE ACTIONS

Performing actions on the table or on the rows within the table

- ☐ Are the most important actions prioritized, with less important actions styled to take up less attention and space?
- ☐ Are the most prominent actions clearly connected with the purpose of the page?
- ☐ Are the default decisions as useful as they could be, ie sorting logic, column visibility, etc?
- ☐ Is there a way to efficiently execute batch actions, ie: with multi-select or keyboard shortcuts?

Inline Editing

- ☐ Are there affordances indicating edit capability, i.e. hover states?
- ☐ Do the inputs for editing have distinct and communicative states, i.e. error, complete, etc?

Checklist Pg 2

Use these prompts to help you think about your table views with fresh eyes. If they don't apply to your context, skip to the next one.

VISUAL HIERARCHY, SPACING & AESTHETICS

How visuals help parse and convey information

- ☐ If you squint your eyes and look at the table, are the things you would expect to be the most prominent, the most prominent?
- ☐ Overall, is the table free of overlapping text?
- ☐ Is there a way to visually differentiate the row you're focusing on, ie: hover states or zebra print?
- ☐ Are actions visually distinct from static information?
- ☐ Are values represented in the most easily "scan-able" way possible, ie avatars, icons, badges?

Tip: See [this demo](#) video on visual hierarchy to it in action within the context of a data table, or get ideas for different ways to visualize your data with [this article](#).

MOBILE

The experience on phones and tablets

- ☐ Is the table responsive?
- ☐ Is density adapted so that targets are larger and easier to interact with?
- ☐ Is the data shown centered around relevant mobile use cases?
- ☐ If any functionality has been removed, is there an alternative way for people to execute the same actions, i.e.: switch to landscape, edit in modal?

INFORMATION SEEKING EXPERIENCES

Filtering, searching and sorting within large datasets

- ☐ Can you filter the information in the table?
- ☐ Can you add/remove columns?
- ☐ Can you reorder columns?
- ☐ Can you sort the values within a column?
- ☐ Is searching within a table available?
- ☐ Is there a visual indicator that indicates which values match the search or filter criteria applied?
- ☐ When the user leaves and returns to the table, is their view sustained within the session?
- ☐ Can users save the layout they've customized?
- ☐ Can users search keywords across the entire page to find key information?

Tip: Focus on allowing relevant information to be more easily found by paying attention to legibility, spacing, and saved customizations so users don't need to spend time on re-applying their queries.

Interpreting your results

You've made it! Good work! We hope this checklist has been eye opening for you. Hopefully you've been guided to think of things that haven't come up with your crew yet 🙌.

SCORING YOUR RESULTS

At a basic level, checking every item off is a good thing, however based on the type of table you have you will need to weigh out the severity and importance of each section accordingly.

Action Oriented

KEY SECTIONS

- Page Shell
- Table Actions

PRIORITY

Efficiency is of the utmost importance for this type of table view. If there are problems in this area, you'll want to address them quickly.

Info Oriented

KEY SECTIONS

- Information Architecture
- Table Data
- Visual Hierarchy
- Information Seeking Experiences

PRIORITY

Clearly understood visual hierarchy and relevant data that makes information easy to parse. If there are problems in viewing information this is critical.

Super User

KEY SECTIONS

All sections need to be very strong with such a 'mega' table experience.

PRIORITY

Not only do users need to easily parse and dive into information, they also need to execute a lot of potentially complex ones—A good experience requires all the functionality above to come together clearly and cohesively. If any sections are failing your whole experience is impacted.

Data Tables Masterclass

Learn about crafting these key experiences and benefit from P&P's rich experience in the wide world of data experiences.

[LEARN MORE](#)