

Principles of Effective Dashboard Design

March 10, 2021

DSCI 551 - Lecture 6

Part 1: Dashboards & Principles of Effective Dashboard Design

The “laws” of crappy dashboards

Source: <http://attackwithnumbers.com/the-laws-of-shitty-dashboard>

Law 1	Most software dashboards are crappy
Law 2	If it’s called “Dashboard”, it’s probably crappy
Law 3	If you don’t know what to take away from your dashboard, your users will definitely not
Law 4	Not talking to users will result in a crappy dashboard
Law 5	Give users full control of your dashboard, and users will fully break it
Law 6	Just because it was useful in a Powerpoint doesn’t mean it’s useful on a dashboard
Law 7	Just because it moves, does not mean it’s not crappy

Purpose-Driven Dashboards

Before you build a dashbard, make sure it has a purpose!

Do not build one just for the sake of building one and contribute more noise!

Questions to ask yourself:

- What is the research question?
- What is the business question?
- Who will use it (audience matters, a lot!)
- How long will they use it (one-time thing vs. continued use) ?
- Do you have time to build it, maintain it, and make it effective?

- Home
- Payments
- Customers
- Products
- Reports
- Apps
- Developers
- Viewing test data
- Settings

Today

Net volume ↕ Yesterday ↕
\$456,581.14 \$253,702.97

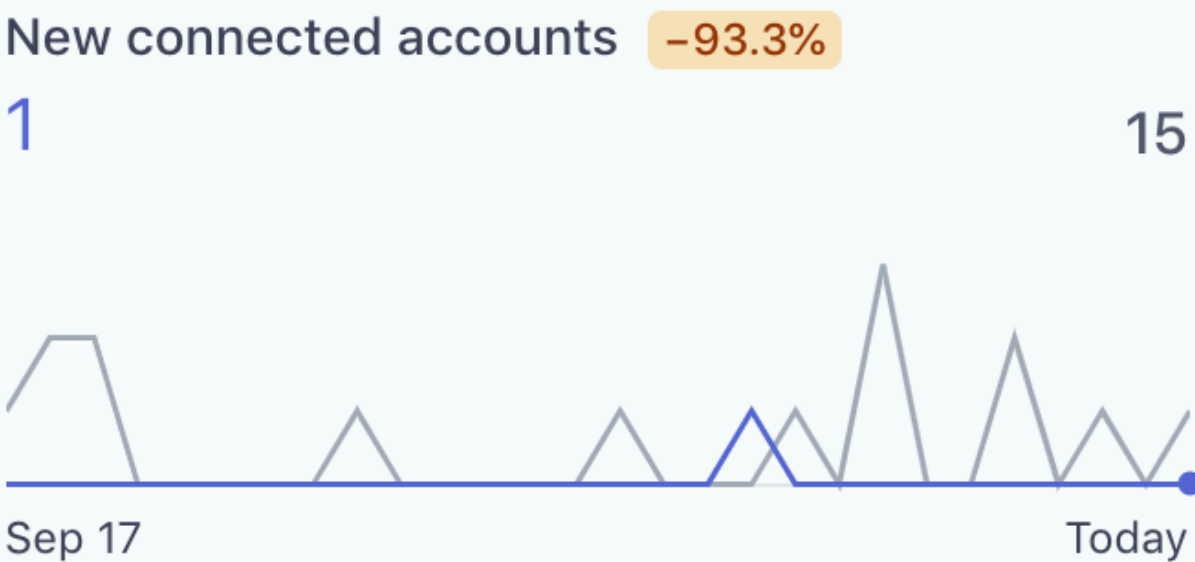
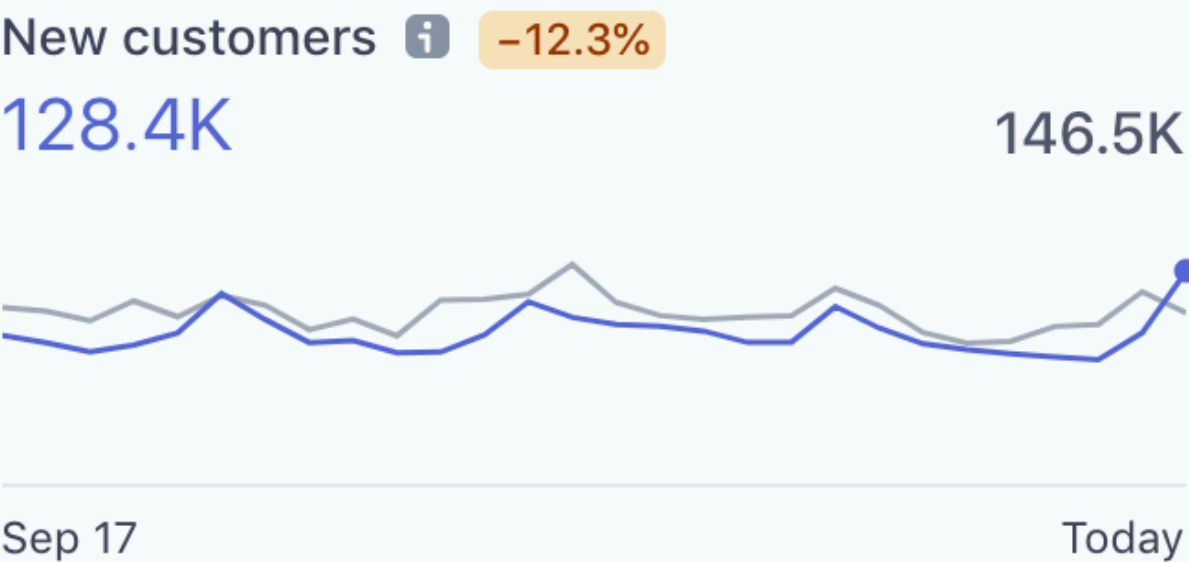
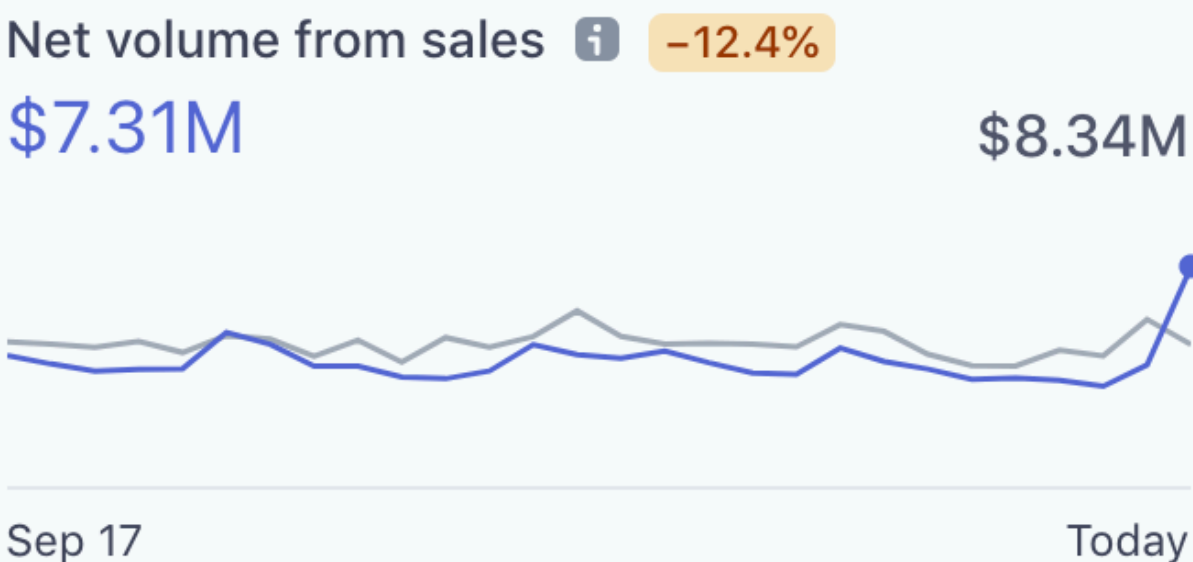
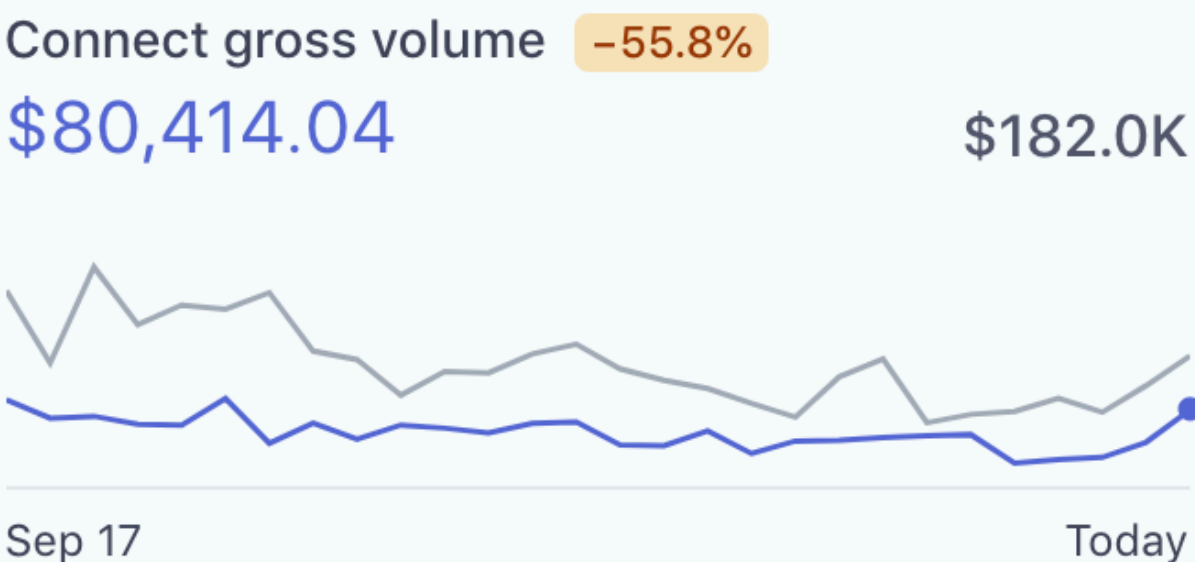


USD Balance ↕ [View detail](#)
\$5,383.52
Available to pay out

Payouts [View detail](#)
\$229,069.82
Expected tomorrow

Analytics

4w ↕ Sep 17, 2019 → Oct 14, 2019 vs. Aug 20, 2019 → Sep 16, 2019 Daily ↕ [Customize](#)



- Home
- Payments
- Customers
- Products
- Reports
- Apps
- Developers
- Viewing test data
- Settings



Today

Net volume \updownarrow Yesterday \updownarrow
\$456,581.14 \$253,702.97

USD Balance \updownarrow View detail
\$5,383.52
Available to pay out

Payouts View detail
\$229,069.82
Expected tomorrow



Analytics


4w \updownarrow Sep 17, 2019 \rightarrow Oct 14, 2019 vs. Aug 20, 2019 \rightarrow Sep 16, 2019 Daily \updownarrow   Customize

Gross volume -12.0% 
\$7.71M \$8.76M

Connect gross volume -55.8%
\$80,414.04 \$182.0K

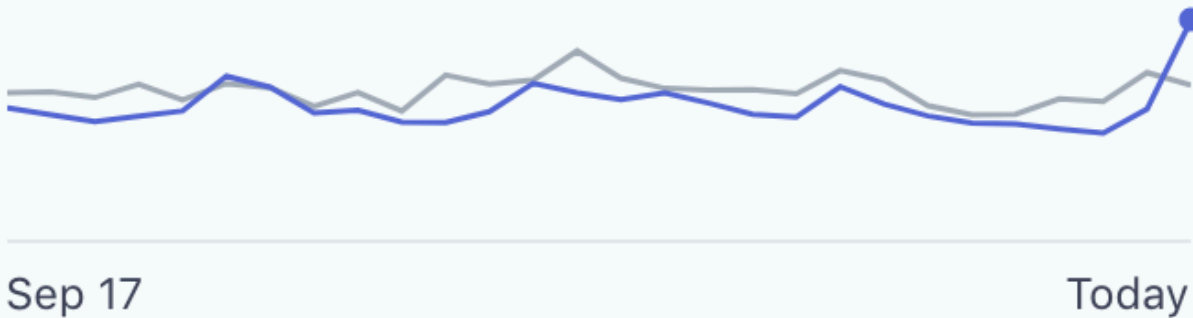
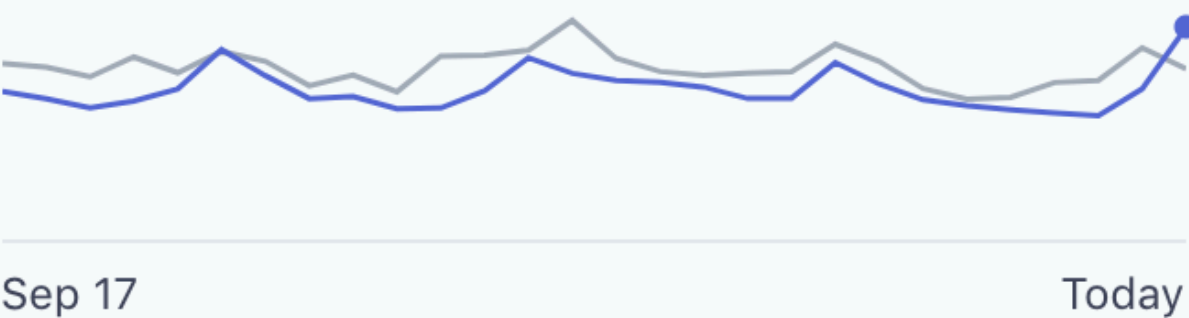
Net volume from sales  -12.4%
\$7.31M \$8.34M



New customers  -12.3%
128.4K 146.5K

New connected accounts -93.3%
1 15

Successful payments -10.4%
154.5K 172.6K



Purpose-Driven Dashboards

FiveThirtyEight



Politics

Sports

Science & Health

Economics

Culture

Should Prison Sentences Be Based On Crimes That Haven't Been Committed Yet?

By Anna Maria Barry-Jester, Ben Casselman and Dana Goldstein
Graphics by Matthew Conlen, Reuben Fischer-Baum and Andy Rossback

Filed under Criminal Justice

Published Aug. 4, 2015



Principles of Effective Visualizations

Principle	Definition	Examples
• Proportional Ink	The amount of ink used to indicate a value should be proportional to the value itself.	Truncating the y-axis on a bar chart to exaggerate the difference between bars violates the principle of proportional ink.
• Data:ink ratio	Remove distracting visual elements to focus attention on the data	Lighten line weights, remove backgrounds, never use 3D or special effects, remove avoid unnecessary/redundant labels.
• Labels & legends	Use axes labels and titles to highlight/communicate data	Never leave your data column names as axes labels! Generally good to add a title.
• Overplotting	With large datasets, points overlap, resulting in large clouds of data	To fix overplotting, could plot just a sample subset of the data, use alpha, and use smaller points. Or, jitter - but check if appropriate!
• Visualization choice	Must be informed by the data you have, the research question being asked and the audience that cares.	Pick the simplest plot that best shows most/all of the data needed to answer the research question. If you only have summary statistics, cannot show distributions. Tailor the visualization to your audience (within reason) but don't dumb it down.
• Colour & Accessibility	Colour can be used to encode information or for aesthetics/style/design. However, colour can also be distracting if used inappropriately or poorly.	Choose a perceptually uniform colour palette; can be sequential or diverging for quantitative data. Opt for colour-blind friendly palettes. Categorical data can use qualitative colour schemes.

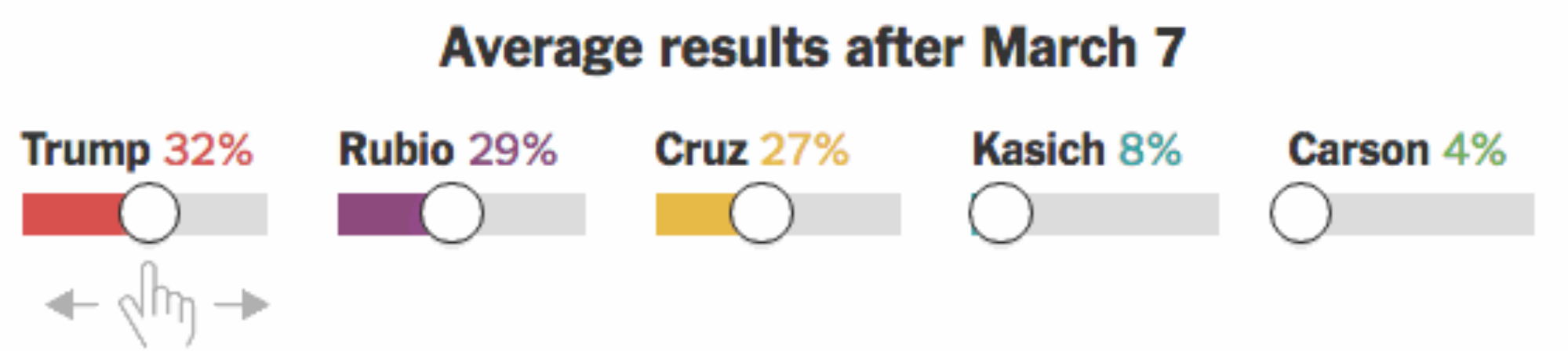
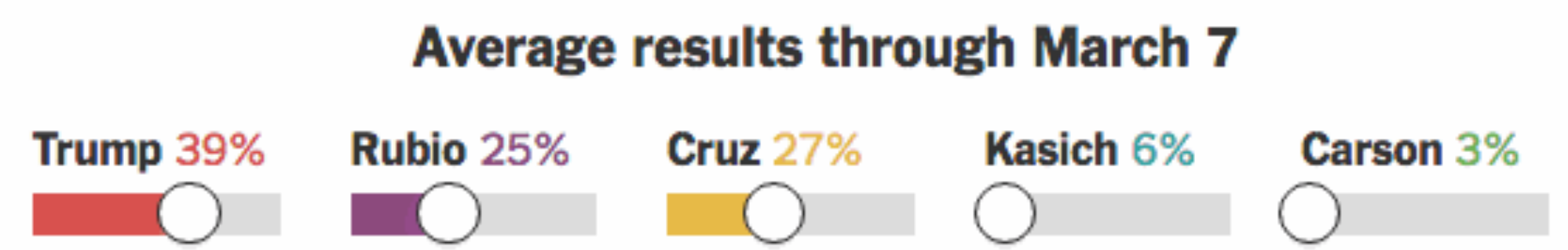
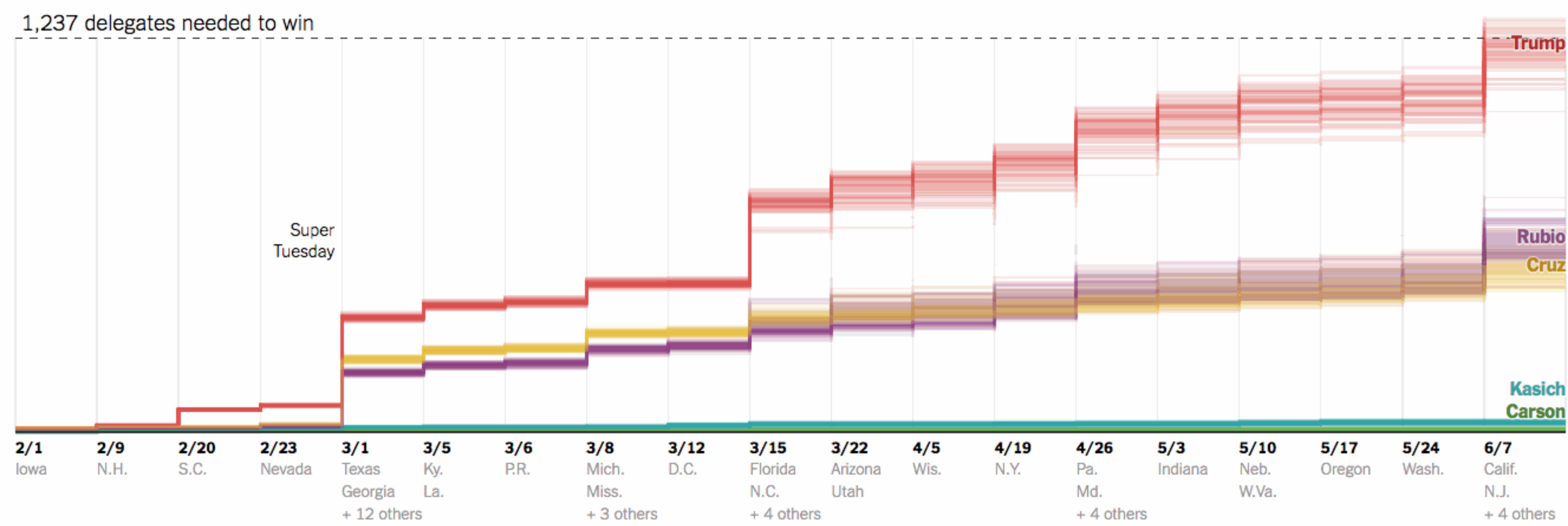
Principles of Effective Visualizations

Principle	Definition	Examples
• Proportional Ink	The amount of ink used to indicate a value should be proportional to the value itself.	Truncating the y-axis on a bar chart to exaggerate the difference between bars violates the principle of proportional ink.
• Data:ink ratio	Remove distracting visual elements to focus attention on the data	Lighten line weights, remove backgrounds, never use 3D or special effects, remove avoid unnecessary/redundant labels.
• Labels & legends	Follow these principles and you will be 80% there to making an effective dashboard !!	Use your data column names as axes. It is generally good to add a title.
• Overplotting		Overplotting, could plot just a sample of the data, use alpha, and use smaller markers - but check if appropriate!
• Visualization choice		Choose the simplest plot that best shows most/all of the data needed to answer the research question. If you only have summary statistics, cannot show distributions. Tailor the visualization to your audience (within reason) but don't dumb it down.
• Colour & Accessibility	Colour can be used to encode information or for aesthetics/style/design. However, colour can also be distracting if used inappropriately or poorly.	Choose a perceptually uniform colour palette; can be sequential or diverging for quantitative data. Opt for colour-blind friendly palettes. Categorical data can use qualitative colour schemes.

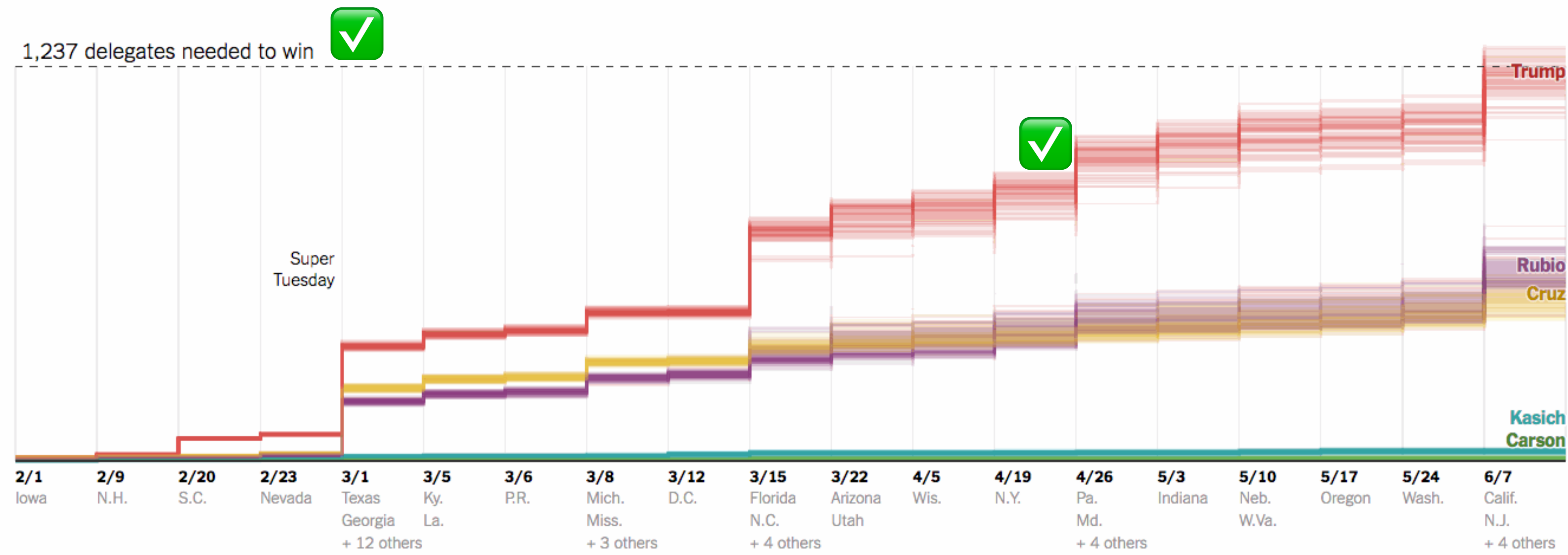
Principles of Effective Dashboards

Principle	Explanation
Audience Matters (a lot!)	<p>You may need to build dashboards with different views:</p> <ul style="list-style-type: none">- one for a manager/executive- one for yourself to explore and understand the data- one for the public
Purpose-driven Dashboards	<p>Every dashboard should have a purpose!</p> <p>Resist the idea to bake in the “purpose” as a dropdown or menu option. What are the usage scenarios? List your intent/purpose in your dashboard!</p>
Choose defaults wisely	<p>Interactivity with your dashboard should NOT be mandatory!</p> <p>When your audience first arrive at your app, self-sufficient.</p>
Less is more	<p>Resist the urge to “plot everything in every way for every category/option/filter. Go back to the “purpose” of the dashboard, make sure you stay true to that. Put cool charts you want people to look at in an appendix, or build a second app.</p>
Add a narrative and signposts	<p>Have a conversation with your reader, add sign-posts, consider adding a “reset/home/defaults” button so they can always get back to the main point if they mess around too much.</p>
Aesthetics matter!	<p>Styling, branding, colour schemes (including colour-blind friendly), typography, layout, user interface (UI) and experience (UX) matter! Think hard about them and make good choices. Find the right balance between aesthetics and functionality.</p>

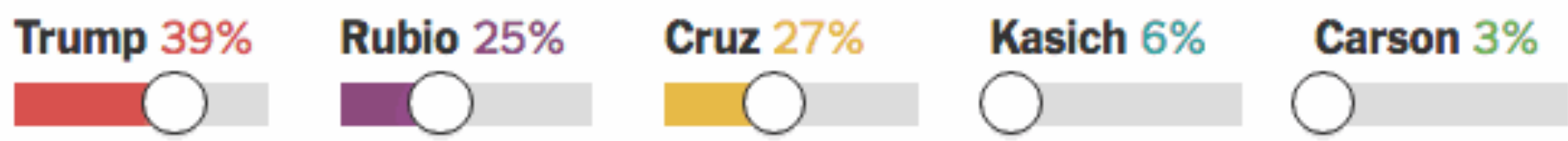
Purpose of Interactivity & Dashboards



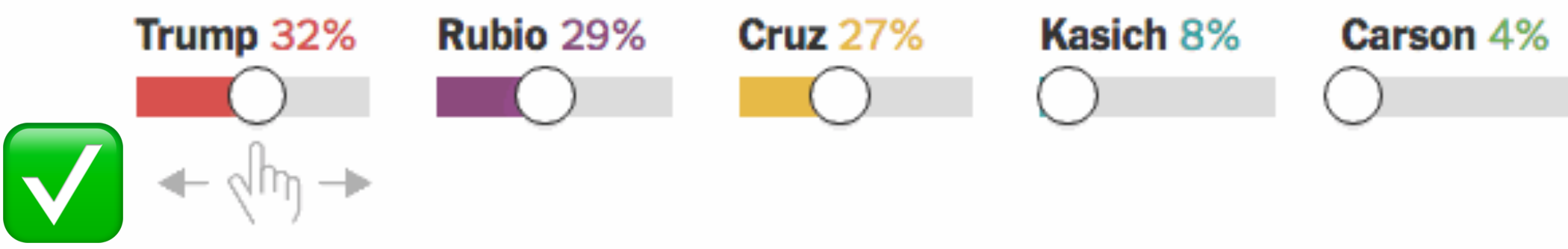
Purpose of Interactivity & Dashboards



Average results through March 7

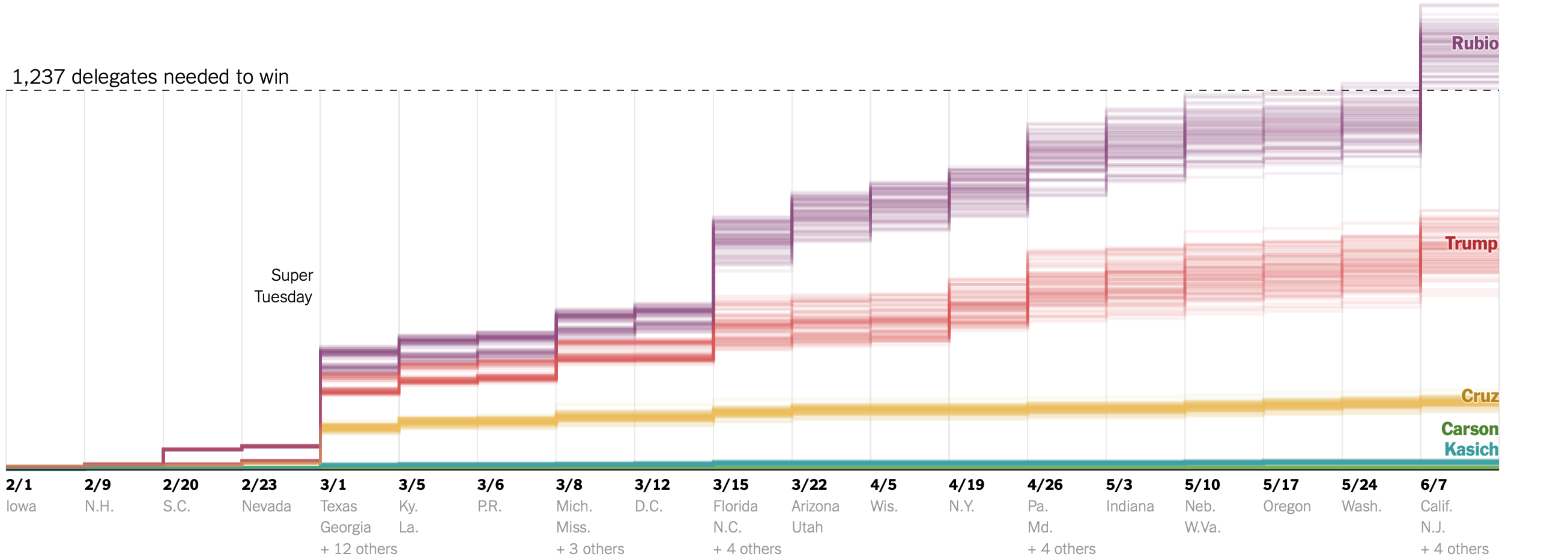


Average results after March 7



Republican nomination. Here are some presets to get you started:

- Rubio with small margins
- Rubio and Trump head-to-head
- Trump wins with huge margins
- Cruz makes a comeback
- Three-way tie
- Trump hits a ceiling



Average results through February 28

Trump 31% Rubio 34% Cruz 26% Kasich 6% Carson 3%



Average results after February 28

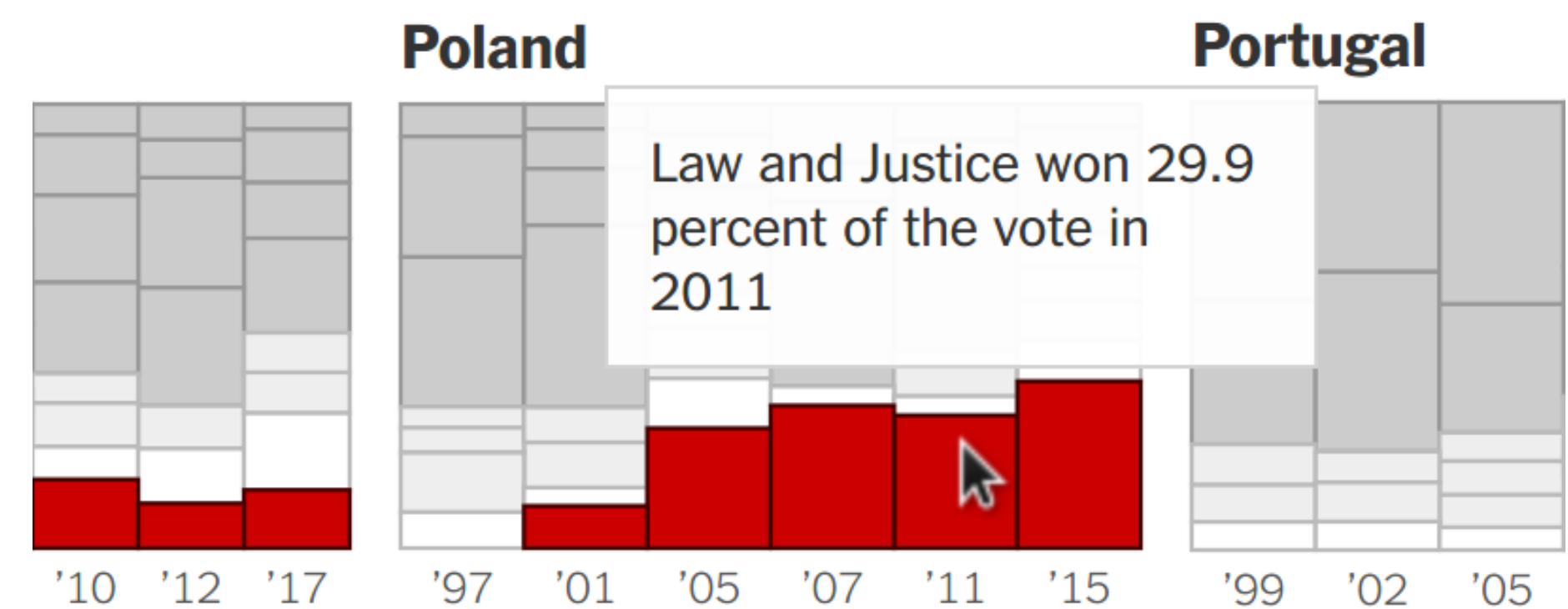
Trump 33% Rubio 40% Cruz 18% Kasich 6% Carson 3%



Purpose of Interactivity & Dashboards

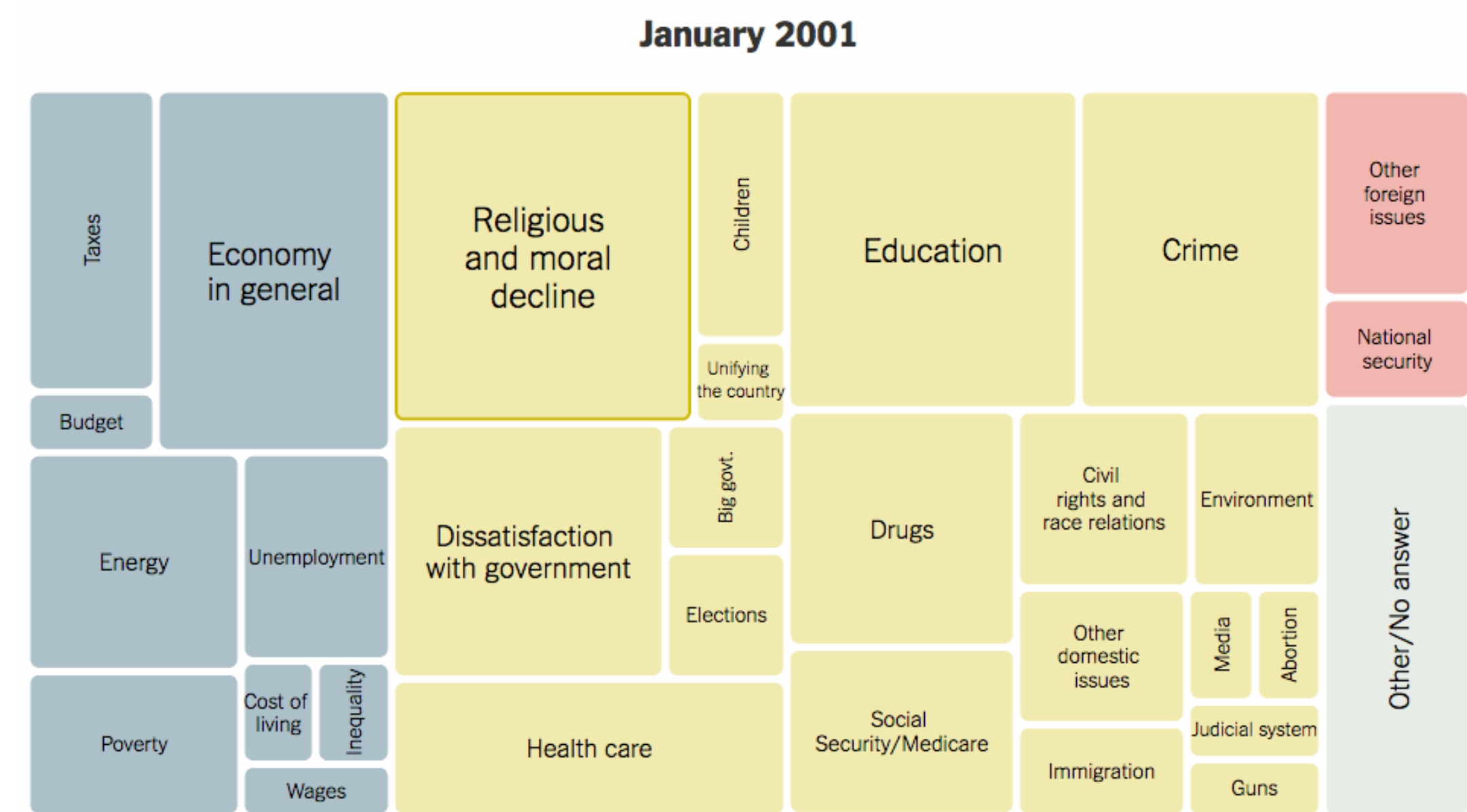
1. Tooltips allow your most interested users to dig deep

Take a look at the following graphic which summarized election results across 20 European countries. Everything you need to see is shown right away. You see the country names, the years and the red bars representing results of right-wing and far-right parties.



2. Interaction allow readers to discover the full dataset

There are cases when you have far more data than fit on a page, which means you have to select which charts to show and which to hide. To avoid cherry-picking we usually try to come up with a selection rule that we apply consistently throughout the piece. For instance, in a recent graphic we decided to show the first poll after the start of the term for each president. Deciding on such a rule is definitely better than just picking charts, but it can still feel arbitrary sometimes. Fortunately we had already set up the graphic in a way that the charts are rendered dynamically. So it didn't cost us much to add in a little bonus feature that allows browsing through the entire dataset.



Principles of Effective Dashboards

Principle	Explanation
Build trust in your analysis	Think about ways you can increase transparency of your data sources and analysis methods. Be upfront about missing data and accuracy of your data. Add tooltips so users can check data.
Think about the “onboarding” experience	What happens when users first visit your site? Related to “set good defaults” but more than that: how do they use it? Where are the controls? What do they do?
Use a consistent layout	Do not burden your users by making them think about the layout of your app and how it’s structured ; should be natural!
Use animations sparingly	Animations can be distracting, use them if you think it will help drive your point home (e.g., prison parole example)
Allow users to filter data (if applicable)	If you start with a giant dataset - say, the gapminder dataset - allow users the ability to filter the data and show data for the country they are interested in; have a good default comp
User testing is critical!	Get someone to look at your dashboard during development. Ideally someone who will be using it

Resources

- “The end of interactive visualizations”
- “In defence of interactive visualizations”
- “The laws of crappy dashboards”

Resources

- “The end of interactive visualizations”
- “In defence of interactive visualizations”
- “The laws of crappy dashboards”



Paul Cothenet @paulcothenet · May 30

Thanks for resharing. In 5 years I sadly don't think any of the above has gotten out of fashion :D



Summary

- Building good dashboards is HARD, you are fighting an uphill battle in the industry because of all the bad dashboards with terrible defaults
- But it is WORTH IT, dashboards are excellent for **exploring data, showcasing important results, and creating a more data-aware society**
- Audience matters! Context matters! Research questions matter!

Part 2: Feedback Session

Feedback Activity

Very important that you follow my lead/cues for times!

Do **not** start early and do not move on to the next steps!

Group
101

123

Group
102

123

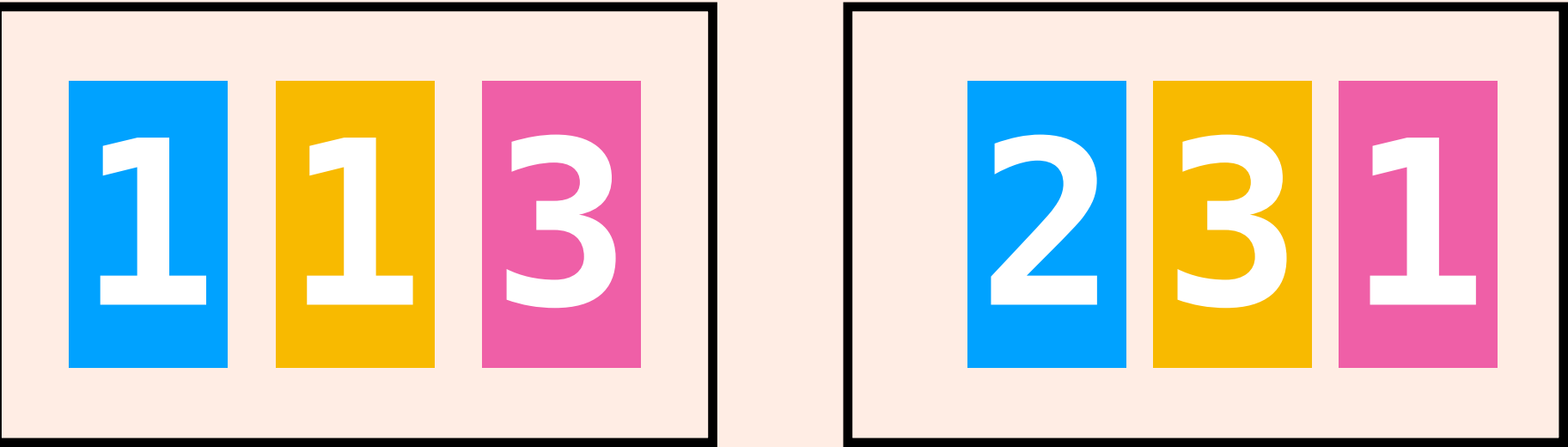
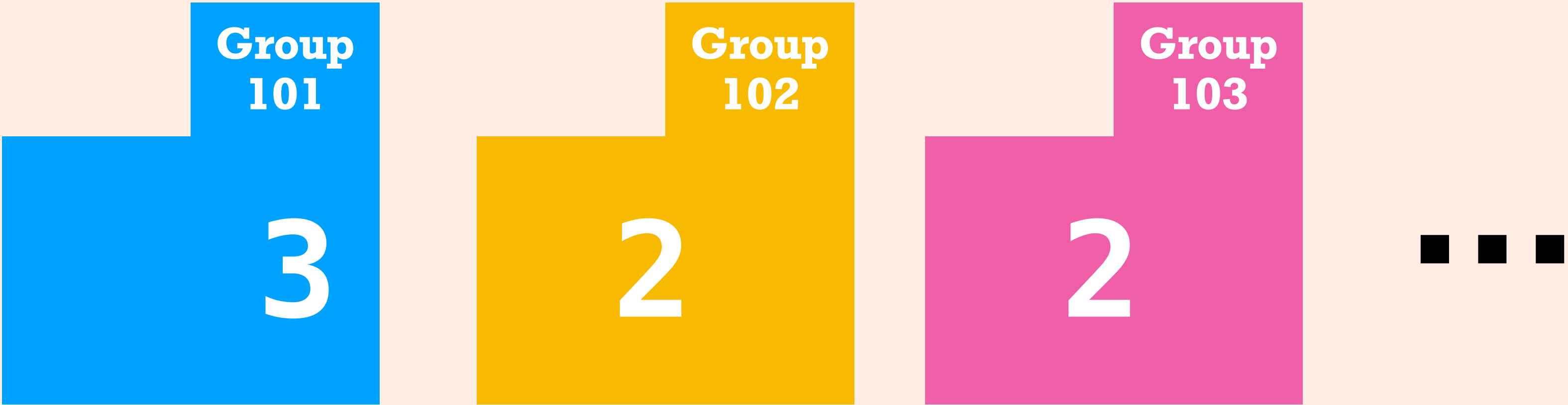
Group
103

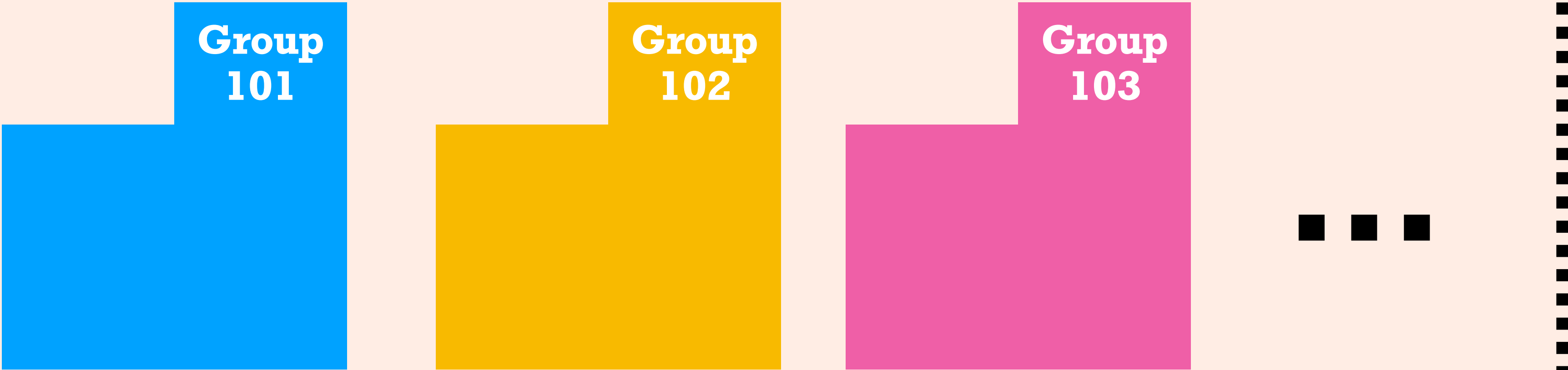
123

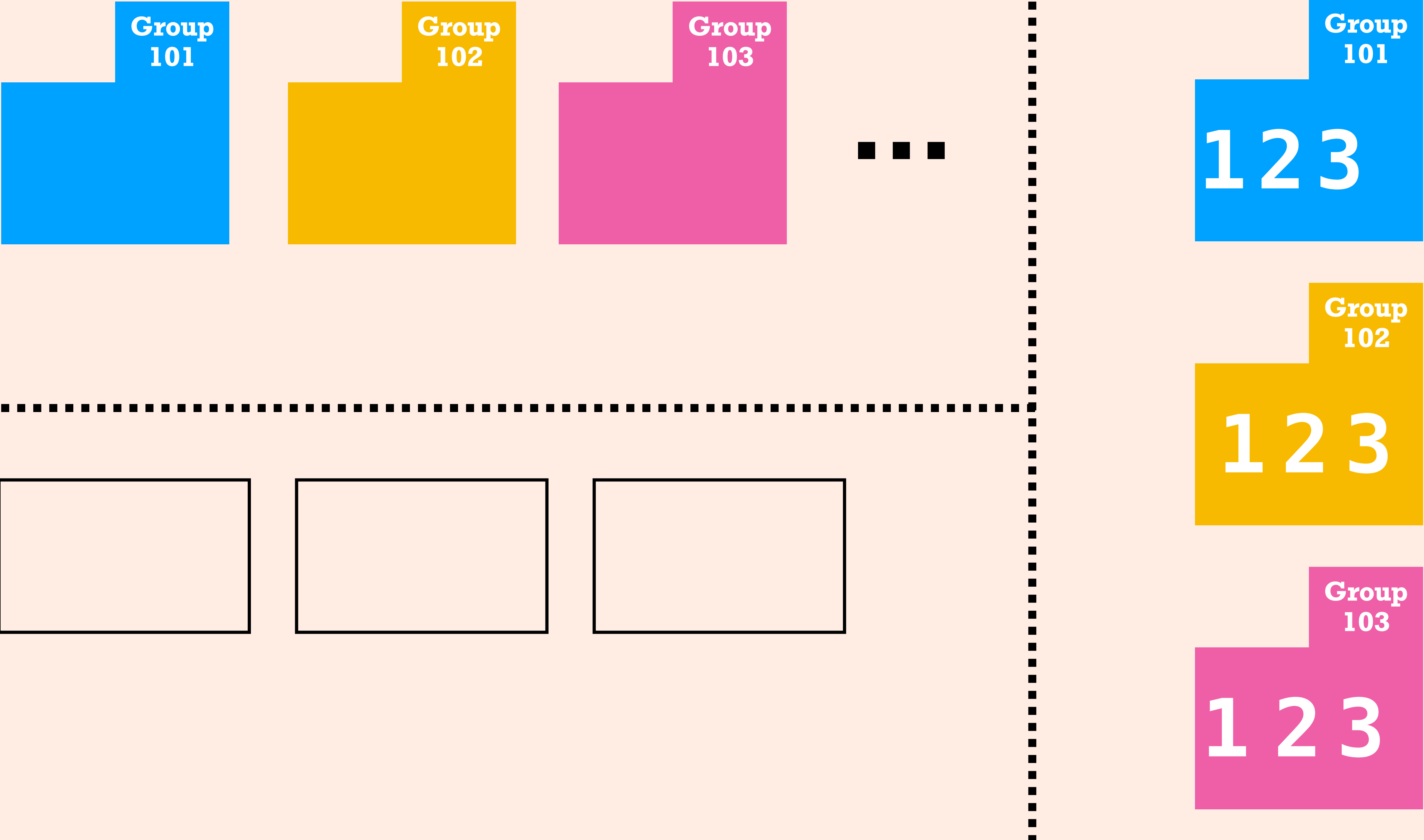
...

.....

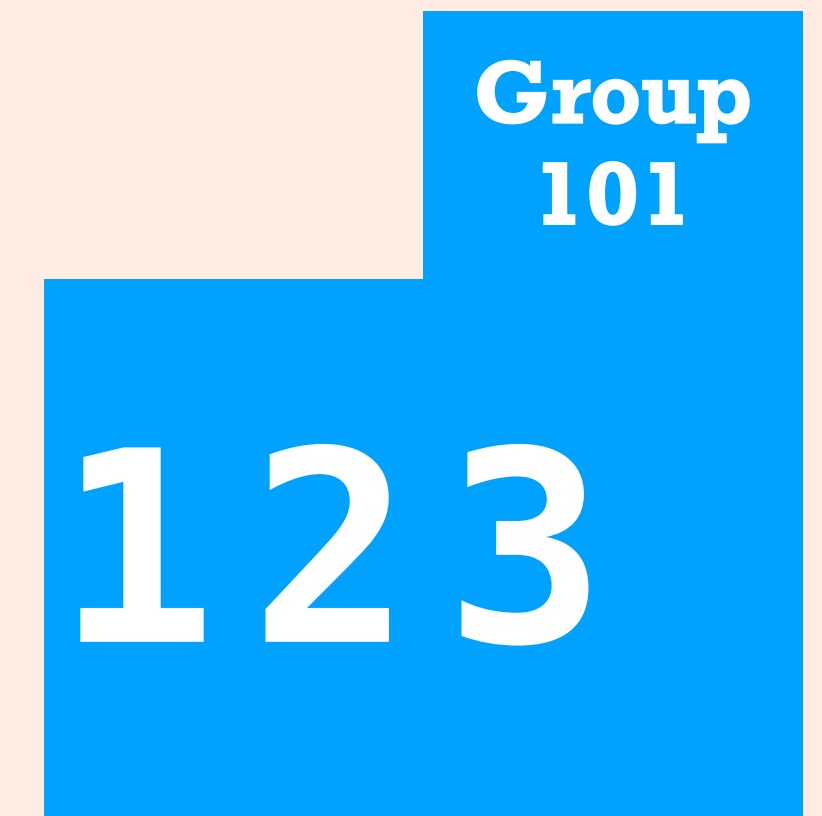
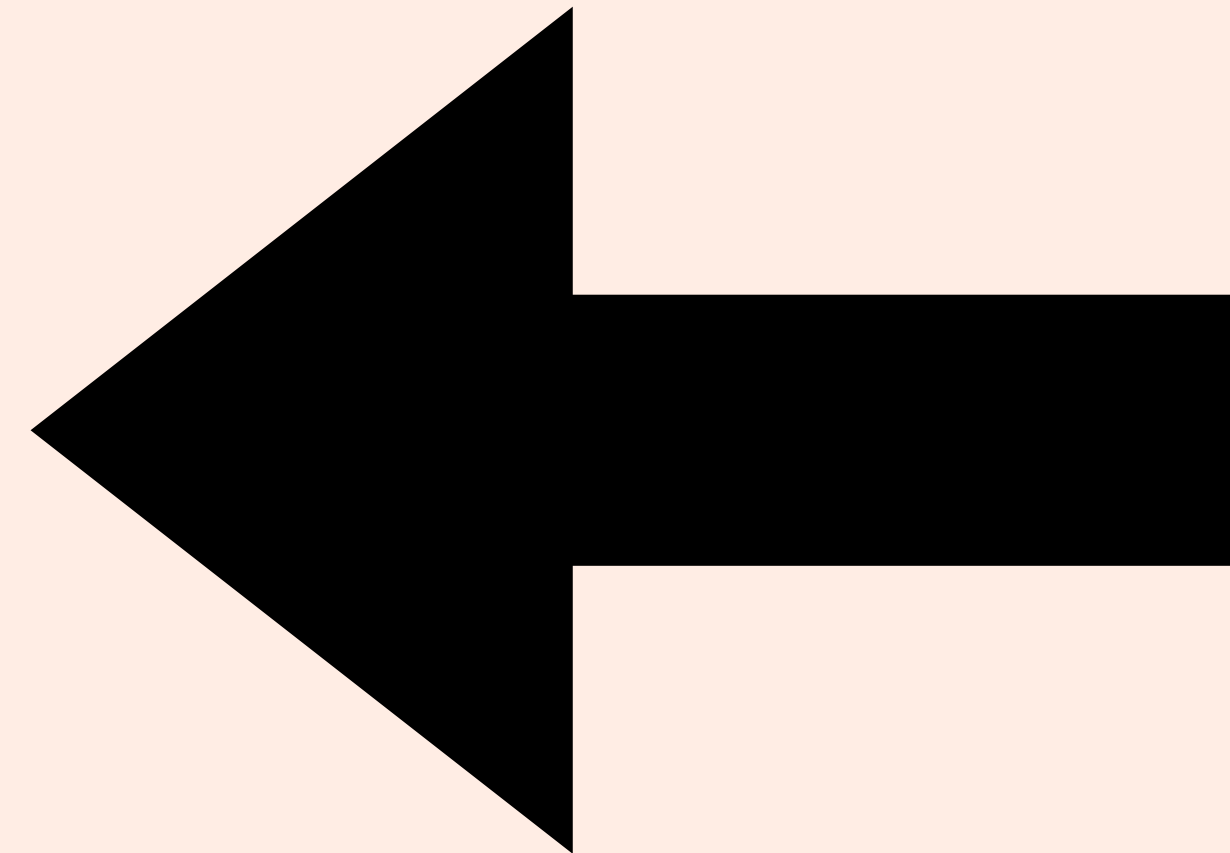
.....







**GitHub Issue
summarizing
all three issues**



Outline

- We will make new groups of 3 (person A,B,C)
- Feedback cycle for Person A [15 mins]
 - [5 mins] **Fly on the wall:**
 - A is a silent fly on the wall and watches/listens while B and C interact with A's dashboard
 - [2-3 mins] **Informed run:**
 - A “presents” their dashboard to B and C.
 - B takes notes on any discussion/feedback that occurs in a GH issue.
 - [7-8 mins] **Discussion.**
 - During discussion, B adds to the GH issue additional feedback, action items, and suggestions

Outline - 2

- Feedback cycle for Person B [15 mins]
- Feedback cycle for Person C [15 mins]
- **Debrief with your own group [30+ mins]**
 - There should now be 3 issues containing feedback for each dashboard
 - Discuss the feedback as a group
 - Create a new issue summarizing action items, link to other issues as needed
 - Close the issues with the raw notes
 - Come up with a game plan for milestone 3
 - **HAVE REASONABLE EXPECTATIONS !!**