DASHBOARD DESIGN WORKSHEET

Instructions: Complete Steps 1 – 4 in the labeled sections of the worksheet below. Step 5 can be done on any number of extra blank pages. You can refer to the completed example for guidance.

1. Think of a specific project, task or question you have in your work right now: writing a grant proposal, planning a collection rehousing project, digitizing, assessing an educational program, proposing a budget, etc. Write out a quick description. Consider the goal or outcome.

2. Who is your audience? Who is going to view or use your dashboard? What do they care about the most, and what are their needs? How might a dashboard be helpful and engaging for your audience?

3. What data are most important to this project?
   a. Write out a bulleted list of all your data fields on the left side of Box 3. Think of what you're measuring, tracking, counting, categorizing, documenting, or highlighting. If you already have a dataset for this project, think of your column headers.
   b. Mark which ones are the most important to include or communicate. Try to keep it to no more than 4 or 5 for this exercise.
   c. Which ones ought to be compared against each other, or grouped together? Draw arrows or circle.
   d. On the right side of the box, rewrite your list, considering which are important and which groupings you've made.
   e. To this new list, add what kind of data they are: categories, geography, measurable numbers, time, counts, etc. Do they have units? (Note: Some data fields could be multiple types, and some don't have units.)

4. Start sketching some independent charts for some of your data groupings. Keep it simple. Think back to visual channels and chart types. You could either first write out which data and which visual channels you're using, or sketch out an idea first and write a description second. Try out multiple visualization ideas for the same data grouping. Use extra paper if needed.

5. On another blank page, play around with how your charts could be arranged together into one dashboard. Try to pick only 2 or 3 to include. Think about how big each chart is. What's front and center or off to the side?
   a. How might it be interactive? Some examples include hoverboxes displaying more details, dropdown list filters, time sliders, or clicking on chart elements to filter as well.
   b. Add descriptive title(s), legends, and/or filter controls to your layout as needed. Perhaps include some simple instructions.

DASHBOARD DESIGN WORKSHEET

1. Objective

2. Audience

3. Data

4. Chart Concepts

FRUIT STAND EXAMPLE WORKSHEET

| 1. Objective	2. Audience
Which country or countries are the best sources for the different fruits we sell?	Fruit stand CEO • Interested in fruit quality and consistency. • Wants to explore and compare different combinations of data easily and quickly.

3. Data

Country ☆
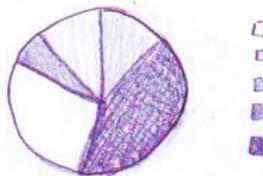Ave fruit weight ☆
% of stock ☆
Year ☆
Fruit ☆
Color
Flavor

Country – location, category
Year - time
Weight – measurable, grams

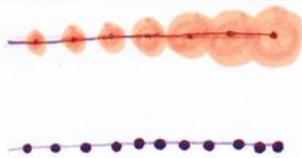Fruit – Category
% of stock – Part of a whole

4. Chart Concepts

wt (g)
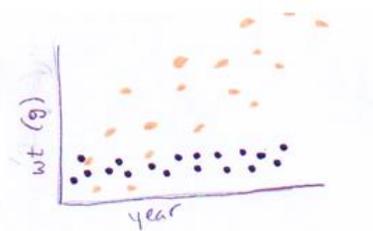
year

Country → color
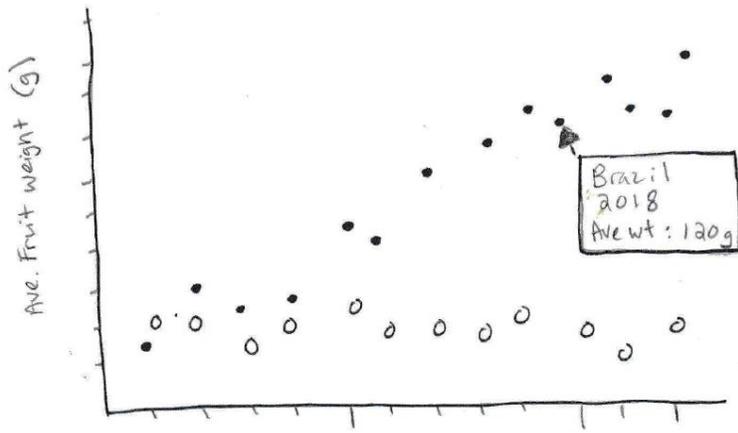Year → x position
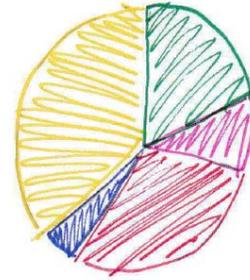Weight → y position

Fruit → color
% of stock → angle size

Country → color
Year → x position
Weight → size

Fruit Quality : Brazil v. Argentina

Click on a fruit in the pie chart to filter the scatter plot.

Ave. Fruit weight (g)

Brazil
2018
Ave wt : 120 g

Year

● Brazil
○ Argentina

Fruit in stock

🟥 Apples
🟨 Bananas
🟦 Blueberries
🟩 Limes
🟪 Watermeln