



HOW TO FIX

A BAD REPORT!



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- Specializes in teaching, consulting, and design

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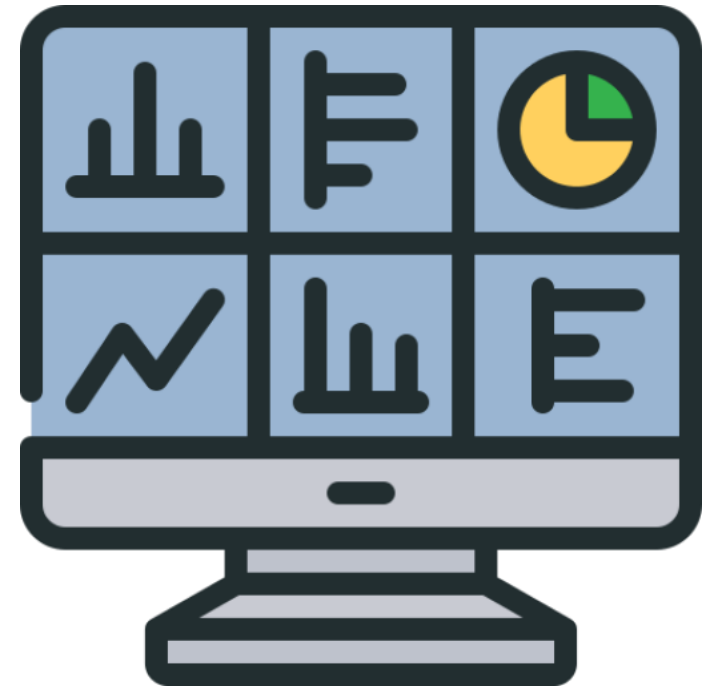


# How to Fix a Bad Report!

A Hot Potato Story

- **Demonstrations**

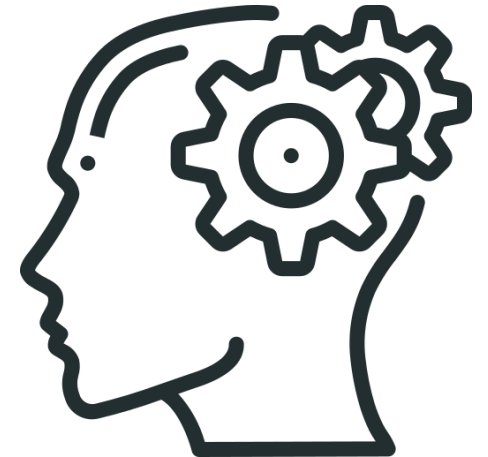
- Reviewing Reader Mode Interactions
- Enhancing Visualizations & Design
- Inspecting Bookmarks
- Tuning Power Query
- Analyzing Relationships
- Optimizing DAX Expressions



# Crafting the User Experience

## Setting the Default User Experience

- Prior to publishing, it is considered *best practice* to set a **default user experience** for the report
- **User experience defaults include:**
  - Page
  - Slicers/Filters
  - Sort order (visual)
  - Drill location
- Appropriately customize these to *reduce* the number user actions during view-time
  - Anytime during view-time – users have the option to “**reset to default**”



# Crafting the User Experience

Default User Experience ► Configurations

- *Published reports* have the following interactions available for report consumers:
  - Page navigation<sup>1</sup>
  - Tooltips – classic and report (visual)
  - Report size options
  - **Visual header options:**
    - Info tooltip
    - Hierarchy controls
    - Active filter list
    - Focus mode
    - Export data
    - More options (...)
  - **Filtering:**
    - Slicers
    - Filters pane
    - Cross-filter
    - Cross-highlight

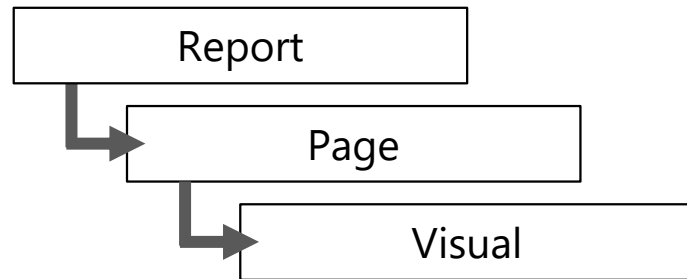


**1:** Experience will differ between **Workspaces** – and **Apps** which have a *different navigation experience*

# Crafting the User Experience

## Filters Pane

- Filters can be placed either in the **filters pane** – or as **slicers** on a report page
- Filters can be applied at *three levels*:



Visual-level

A screenshot of the 'Filters' pane in a data visualization tool. The pane is titled 'Filters' and has a search icon and a right-pointing arrow. Below the title, there are three filter cards. The first card is for 'Category' with the value 'is (All)'. The second card is for 'Cost' with the value 'is (All)'. Below these cards is a button labeled 'Add data fields here'.

Page-level

A screenshot of the 'Filters' pane in a data visualization tool. The pane is titled 'Filters on this page' and has a search icon and a right-pointing arrow. Below the title, there are two filter cards. The first card is for 'State' with the value 'is (All)'. The second card is for 'Zip Code' with the value 'is (All)'. Below these cards is a button labeled 'Add data fields here'.

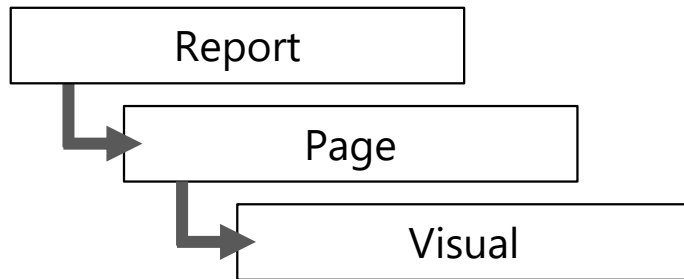
Report-level

A screenshot of the 'Filters' pane in a data visualization tool. The pane is titled 'Filters on all pages' and has a search icon and a right-pointing arrow. Below the title, there is one filter card for 'Year' with the value 'is (All)'. The card has a dropdown arrow, a close button (X), and a lock icon. Below the card is a button labeled 'Add data fields here'.

# Crafting the User Experience

## Filters Pane

- Filters can be placed either in the **filters pane** – or as **slicers** on a report page
- Filters can be applied at *three levels*:



**1:** Commonly, visual-level filters should be hidden from **Reading View**

Developer filters<sup>1</sup>

Report viewer filters

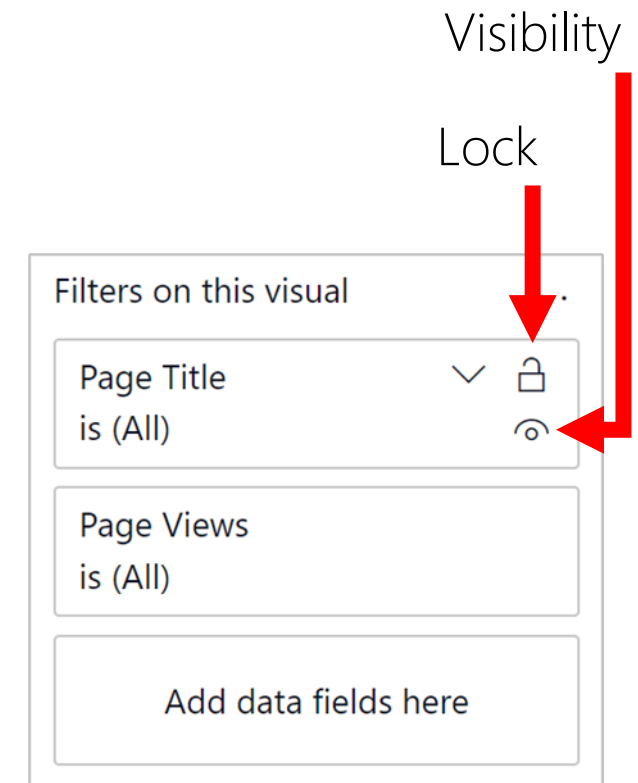
The screenshot shows the 'Filters' pane in Power BI. At the top, there is a funnel icon, the word 'Filters', and a right-pointing arrow. Below this, there are three sections of filters, each with a three-dot menu icon to its right. The first section is 'Filters on this visual' and contains two filter cards: 'Category is (All)' and 'Cost is (All)'. Below these cards is a button that says 'Add data fields here'. The second section is 'Filters on this page' and contains two filter cards: 'State is (All)' and 'Zip Code is (All)'. Below these cards is a button that says 'Add data fields here'. The third section is 'Filters on all pages' and contains one filter card: 'Year is (All)'. This card has a dropdown arrow, an 'x' icon, a lock icon, and a visibility icon. Below this card is a button that says 'Add data fields here'. Red brackets on the left side of the image group the first two sections under the label 'Developer filters<sup>1</sup>' and the last two sections under the label 'Report viewer filters'.

# Crafting the User Experience

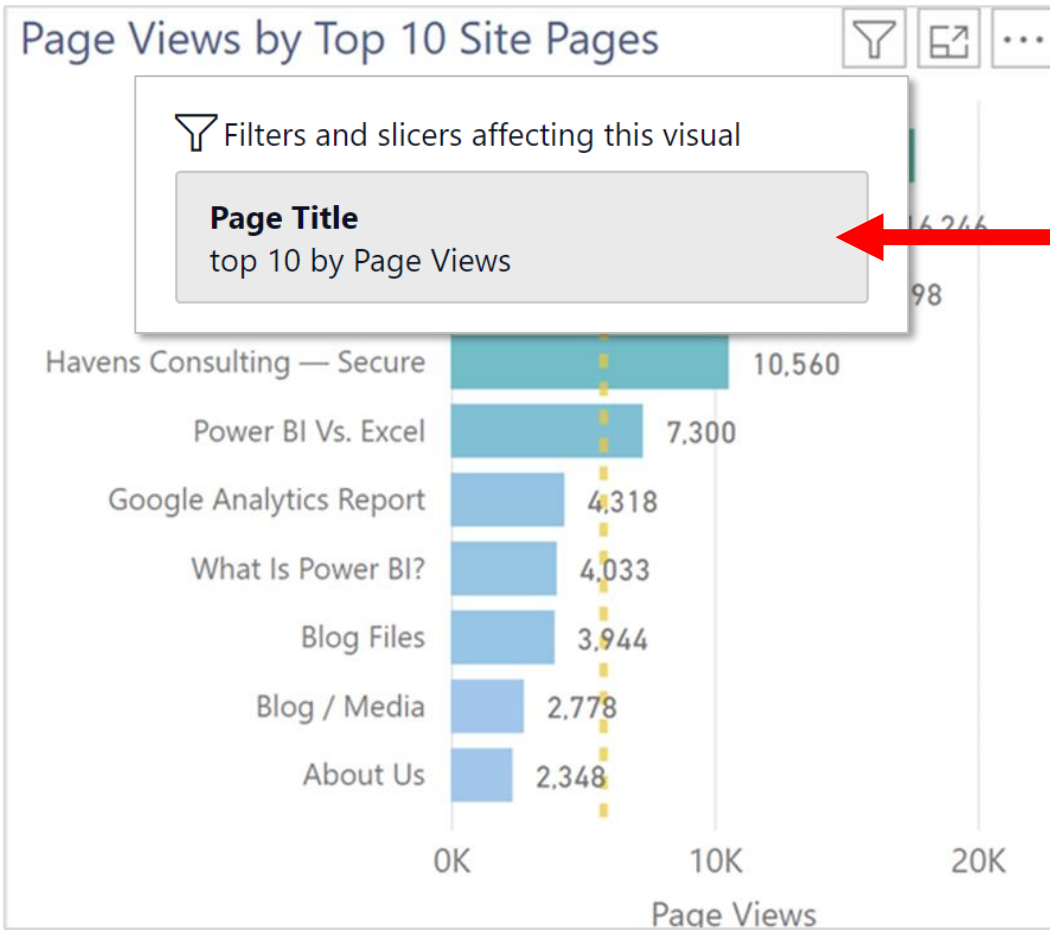
## Filters pane ► Configuration

- Filters can also be configured to *remove user interactions*:
  - **Locked** – where users cannot *edit* or *remove* the filter
  - **Hidden** – where users cannot *see the filter* in the report experience<sup>1</sup>

**1:** Field will be hidden both in the **Filter Pane** and in the **Visual Header** filter icon





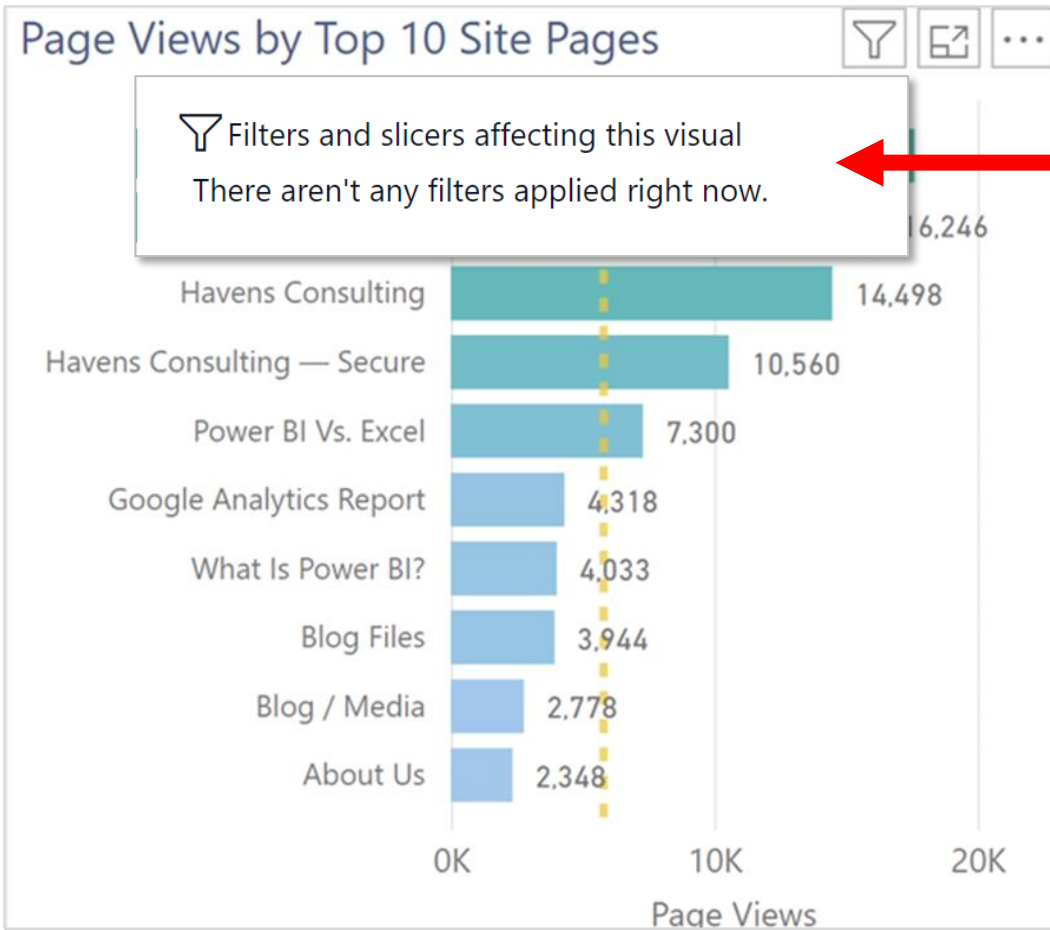


Filter showing in *visual filters* list

Visible

#### Filters on this visual

- Page Title** top 10 by Page Views  
Visible
- Page Views is (All)
- Add data fields here



Filters and slicers affecting this visual  
There aren't any filters applied right now.

Filter **hidden** from *visual filters* list

Hidden

Filters on this visual ...

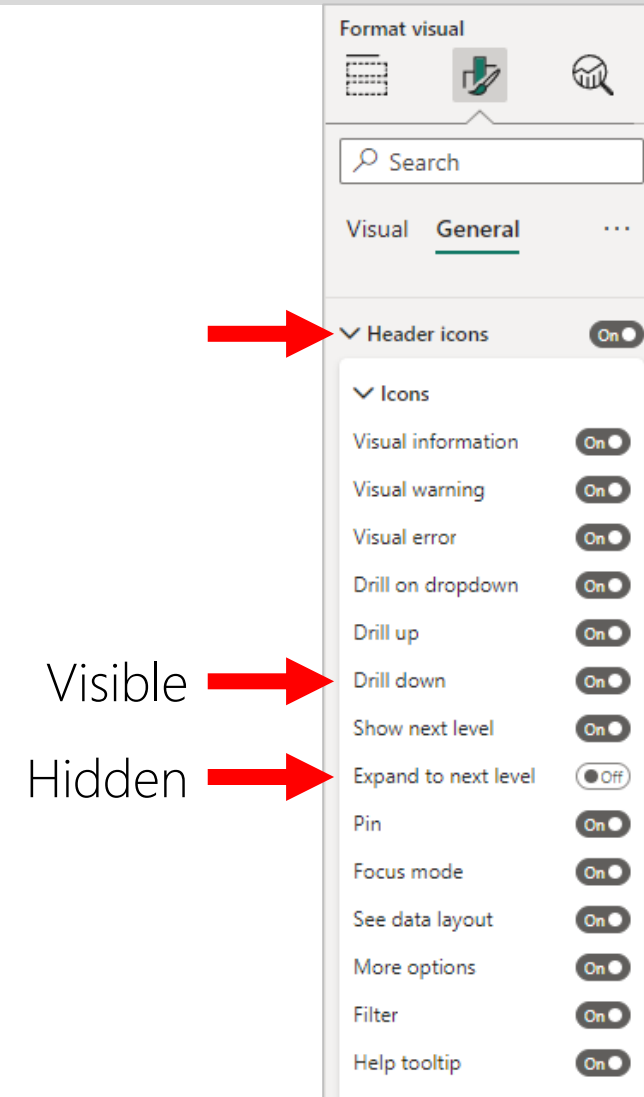
- Page Title** top 10 by Page Views  Hidden
- Page Views is (All)
- Add data fields here

# Crafting the User Experience

## Header Icons ► Configuration

- Each object on a report page contains a series of header icons designed for *user interaction*
- Icon visibility can be configured per each visual<sup>1</sup>
  - Configurations to the Header Icons can only be observed in **Reader Mode** in the service
- Commonly, it's recommended to hide any icons that don't provide *additional functionality* for an object

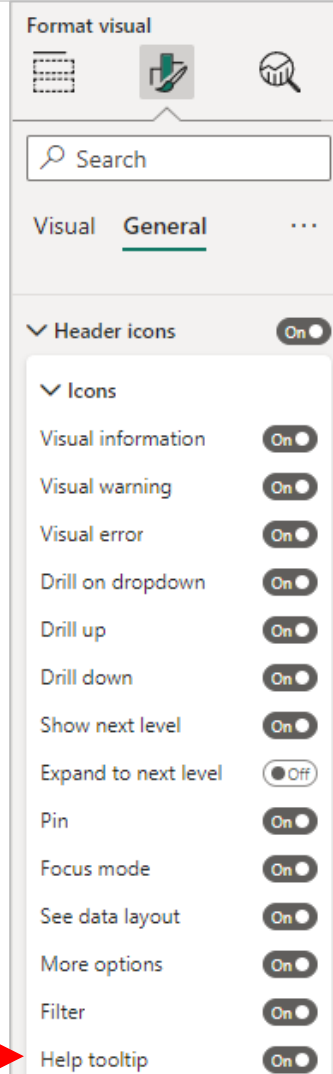
**1:** The **PowerBI.tips Theme Generator** can configure *report-level defaults* for Header icon visibility



# Crafting the User Experience

Header Icons ► Help Tooltip

- Configurations for visual header report tooltips are accessed in the *visual header* for the *visual*
- **Visual header tooltip settings:**
  - **Visual header tooltip icon** (*toggle*) – enables the tooltip icon and toggles visibility of the configuration menu for the visual header tooltip



Help tooltip toggle located here 

# Crafting the User Experience

Header Icons ► Help Tooltip ► Configuration

- Configurations for visual header report tooltips are accessed in the *visual header* for the *visual*
- **Visual header tooltip settings:**
  - **Visual header tooltip icon** (*toggle*) – enables the tooltip icon and toggles visibility of the configuration menu for the visual header tooltip
  - **Visual header tooltip** (*menu*) – contains all configuration options, such as:
    - *Type* – Assign either text or report page (if desired)
    - *Tooltip Text* – text to display inside tooltip
      - Up to 250 characters
    - *Formatting options*
      - E.g. font size, color, background, transparency

The image shows a configuration panel for 'Help tooltip'. At the top, there are two toggle switches: 'Help tooltip' (set to 'On') and 'Smart narrative' (set to 'Off'). Below these is a section titled 'Help tooltip' with a dropdown arrow. Under this section, there are three main areas: 1. 'Type' dropdown menu, currently set to 'Text', with a red arrow pointing to it. 2. 'Page' dropdown menu, currently set to 'None'. 3. 'Tooltip text' text area containing the placeholder text 'Enter helpful information about this visual', with a red arrow pointing to it. Below the text area is a 'Font' section with a dropdown set to 'Segoe UI' and a size of '9', along with bold, italic, and underline icons. Below that is a 'Color' section with a color picker. Below that is a 'Background color' section with a color picker. At the bottom is a 'Transparency' section with a percentage dropdown set to '0%' and a slider.



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# References

- Line Chart Conditional Formatting
  - [https://youtu.be/2\\_2rGxA6PKQ](https://youtu.be/2_2rGxA6PKQ)
- Custom Visual Header Tooltips
  - <https://youtu.be/mtt8fR54Agg>
- Creating Sliding Toggle Buttons
  - <https://youtu.be/6SDIa1-dg-8>
- Smart Narrative Tooltips
  - <https://youtu.be/vhwL59cr-u0>
- Card Layering, Tooltips, & Alignment
  - [https://youtu.be/3Ija\\_5afjBA](https://youtu.be/3Ija_5afjBA)
  - <https://youtu.be/49XjvqjAo58>
  - <https://youtu.be/8UPWDvyfYCA>
- Matrix Table Heatmap
  - [https://youtu.be/aCq9Nz8K\\_Cs](https://youtu.be/aCq9Nz8K_Cs)
- Line Chart KPI Formatting & Bands
  - [https://youtu.be/tJd\\_MGXXfnU](https://youtu.be/tJd_MGXXfnU)
- Custom KPI Card with Health Bar
  - <https://youtu.be/5RnqhwF1cds>
- Title Breadcrumb Trail
  - <https://youtu.be/rNyVTfMzsuA>
- Time Perspectives with Bookmarks
  - <https://youtu.be/9J5gtv5KUNc>