
User Group
Summit
NORTH AMERICA

Demystifying Chart Types and Report Design Principles

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MVP Microsoft® Most Valuable Professional

Session Agenda

Defining a Report

- Descriptions of report components and characteristics

Design Principles

- Practices for designing more effective reports

Data Visualizations

- Methodologies for creating impactful visualizations

Apply Practices

- Implementation of principles on a Power BI report

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Microsoft® MVP Most Valuable Professional

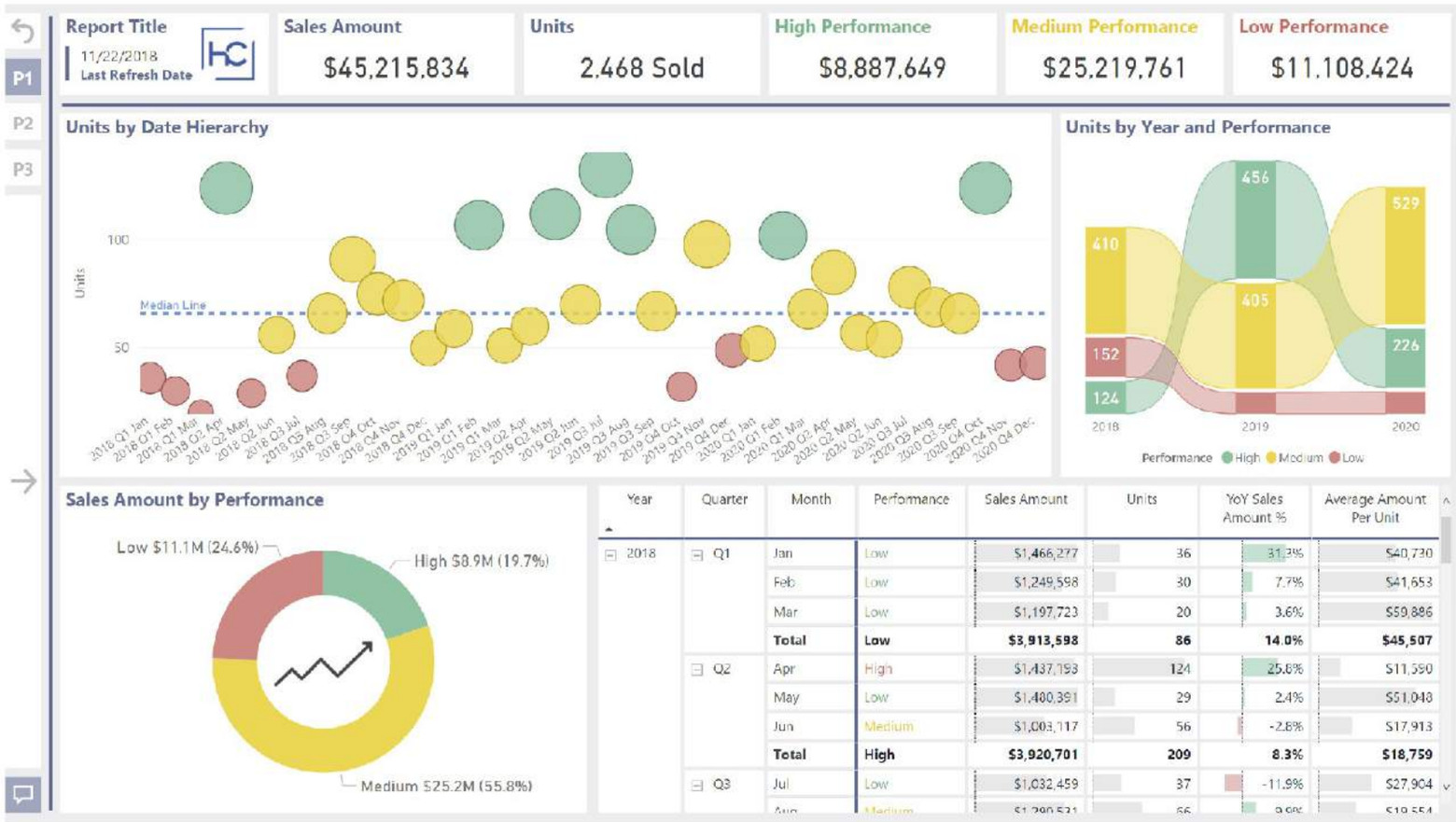
Power BI Real-Time Demo Survey

Defining a Report

- Descriptions of report components and characteristics

Defining a Report

"A report is a **visual display** of the **most important information** needed to **achieve** one or more **objectives**; consolidated and arranged…so the information can be **monitored at a glance**."
~Stephen Few

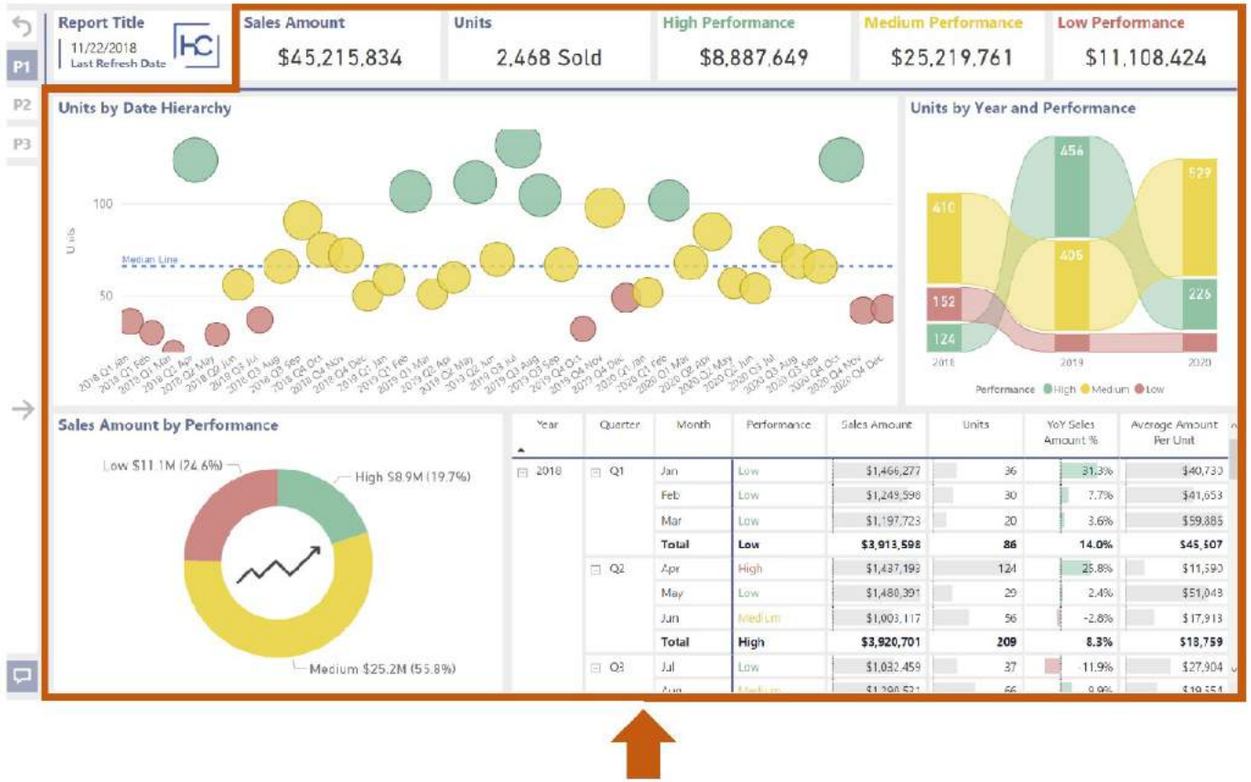


Defining a Report

Essential Report Components

Three primary components of a report

- **Visualizations**
  - Displays patterns, trends, or outliers in the data



Defining a Report

Essential Report Components

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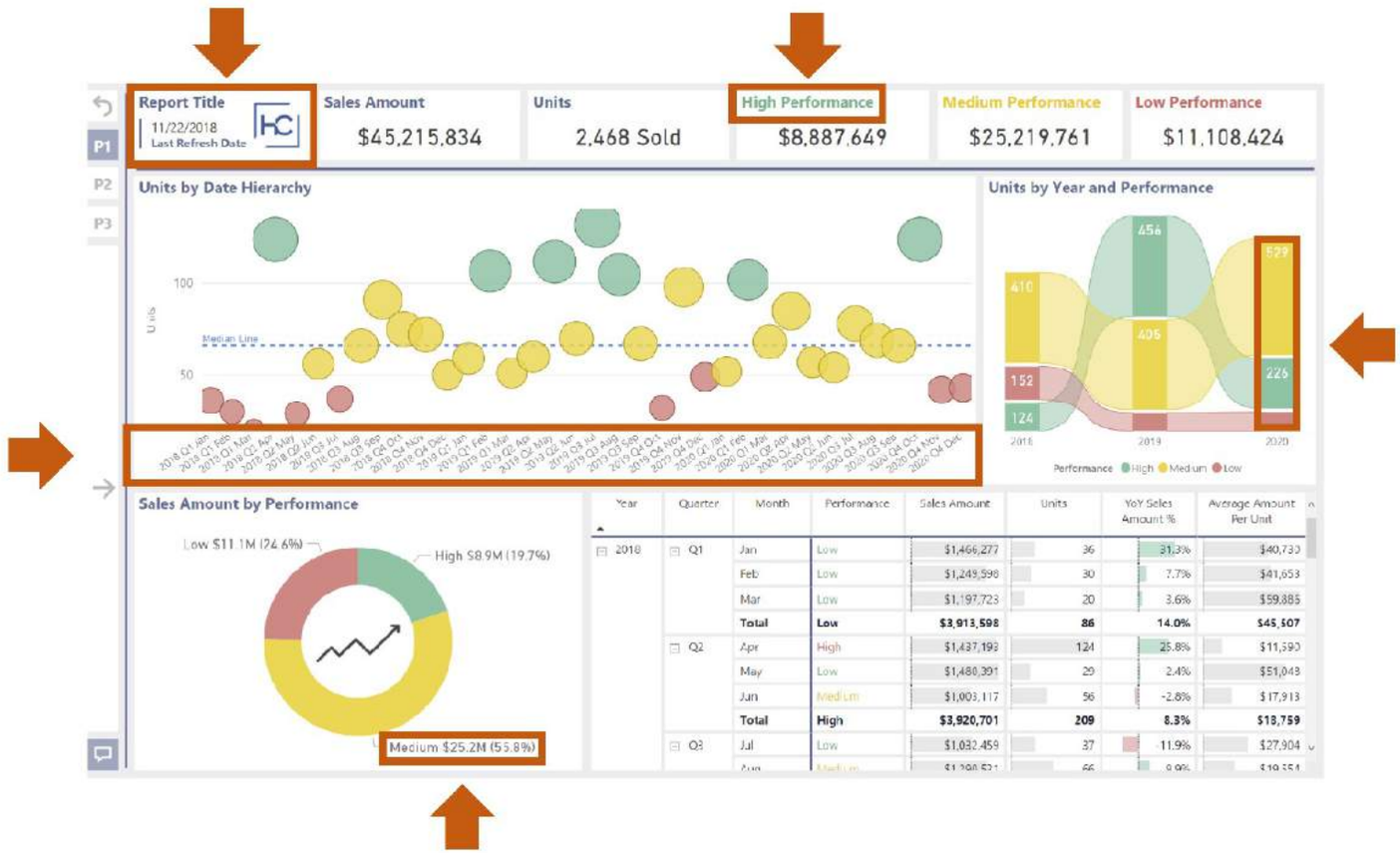
  - Gives additional information about the data or report



Defining a Report

Essential Report Components

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Three primary components of a report

- **Visualizations**
  - Displays patterns, trends, or outliers in the data
- **Information**
  - Gives additional information about the data or report
- **Filters / navigation**
  - Provides ways to interact with and drill into the data

ALL THREE ARE NEEDED TO CREATE AN EFFECTIVE REPORT

Defining a Report

Essential Report Components ► Visualizations

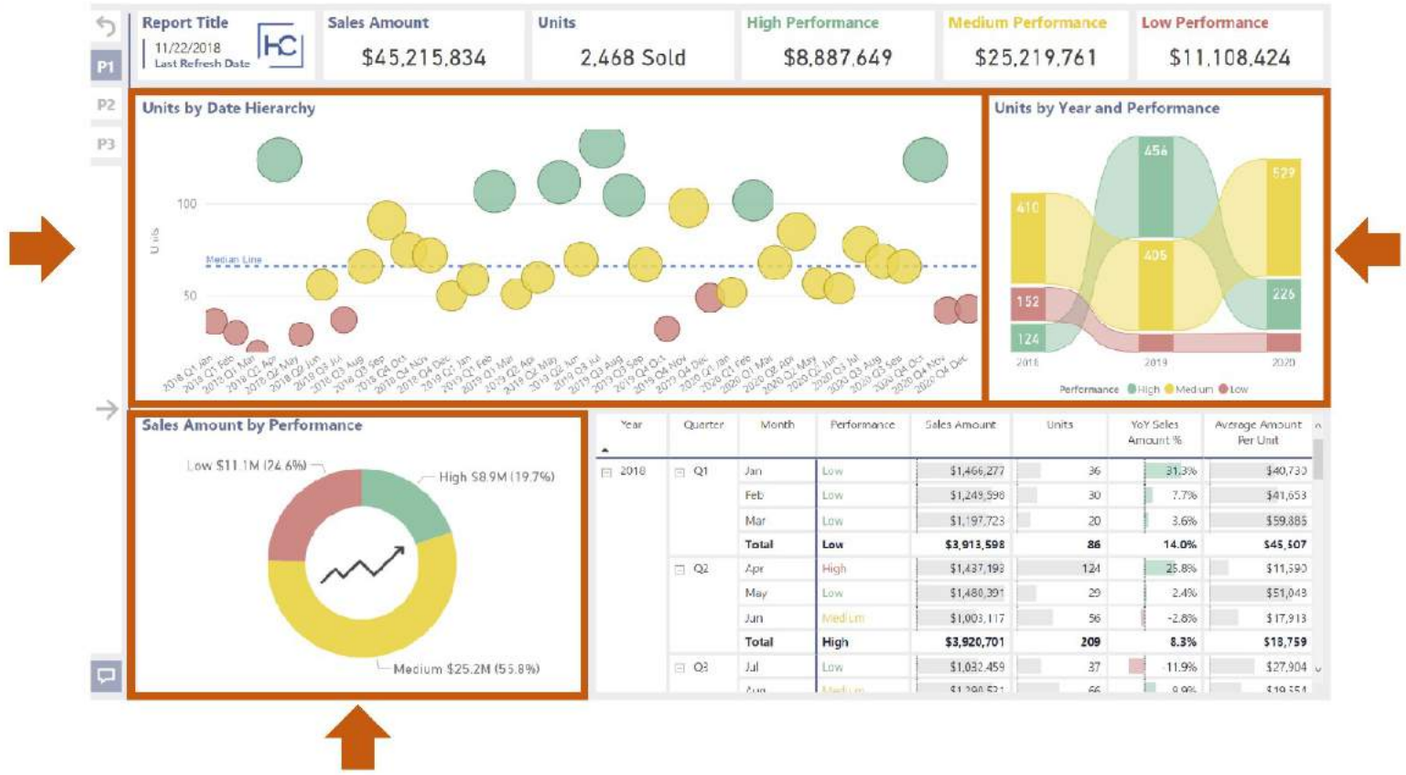
Defining visualizations

- Displays summarized data that has been categorized and sorted
- Tells a story about the data

Types of visuals

Charts / graphs

- Data represented graphically across time or categories



Defining a Report

Essential Report Components ► Visualizations

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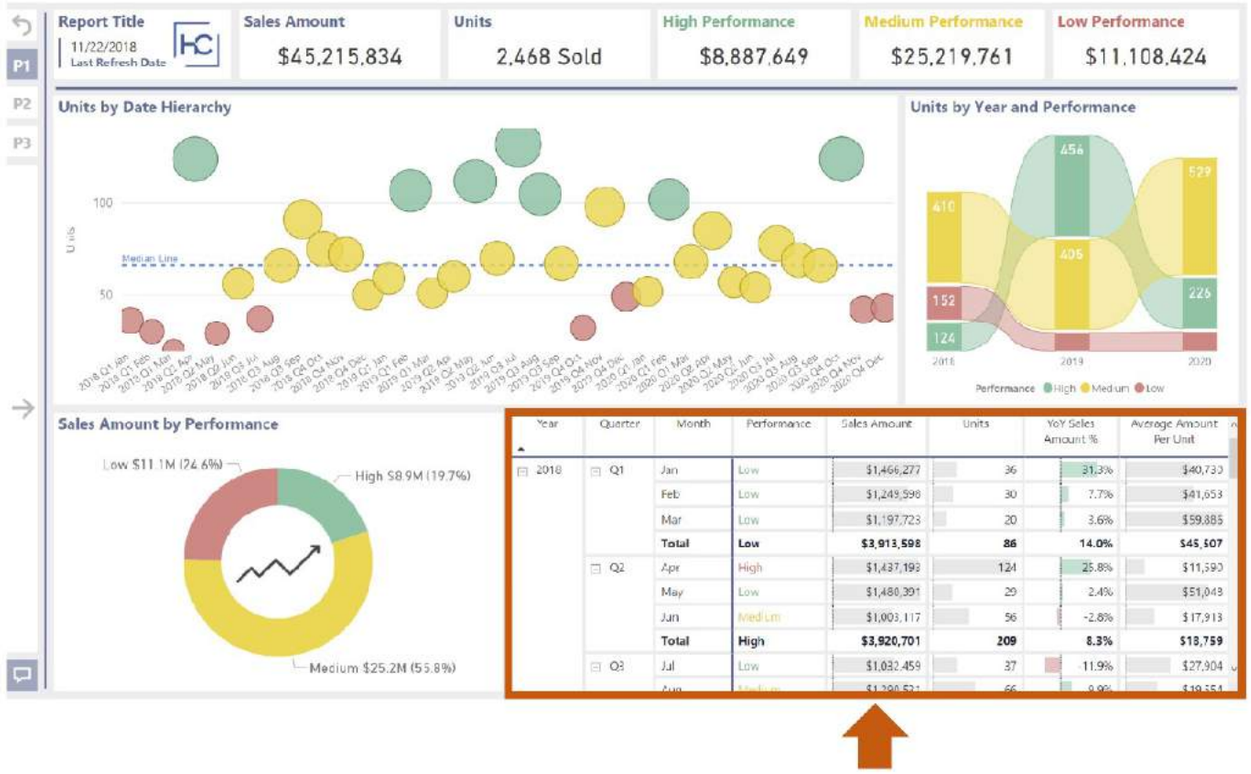
- Data displayed on columns and rows



Defining a Report

Essential Report Components ► Visualizations

Defining visualizations

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Key performance indicators (KPI's)

- Quantifiable values used to measure performance

Defining a Report

Essential Report Components ► Visualizations

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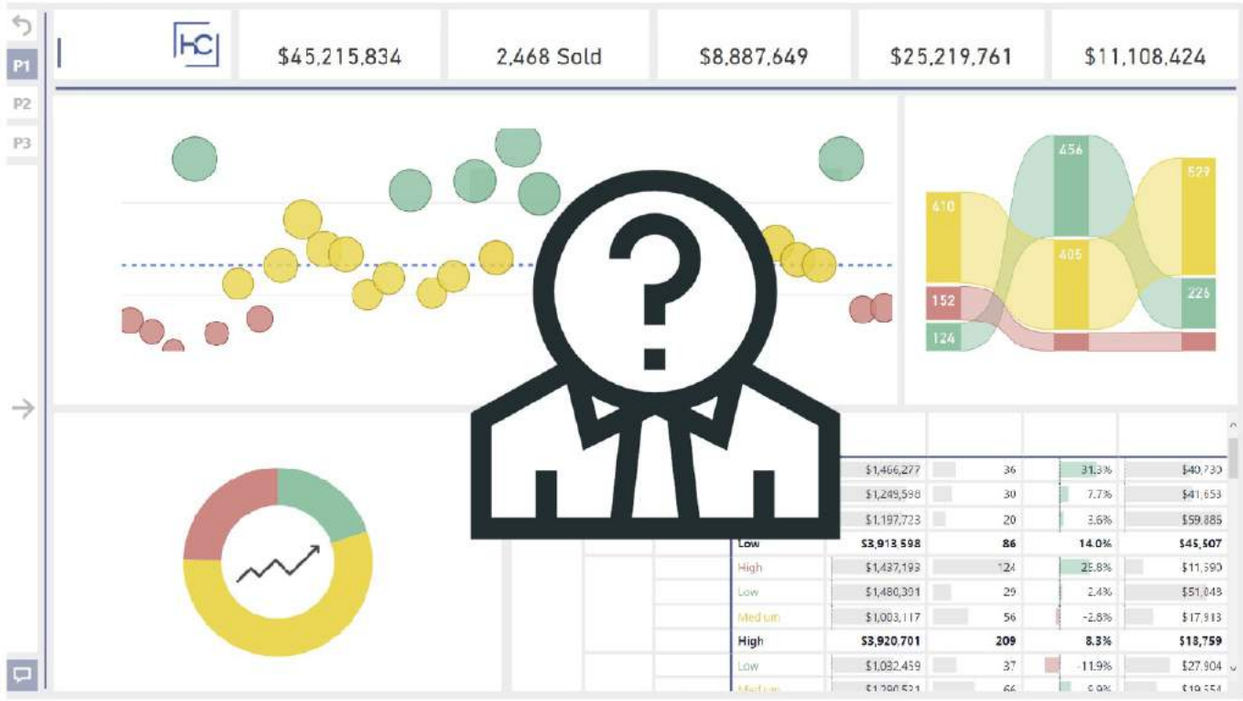


REPORTS NEED INFORMATION TO INTERPRET DATA

Defining a Report

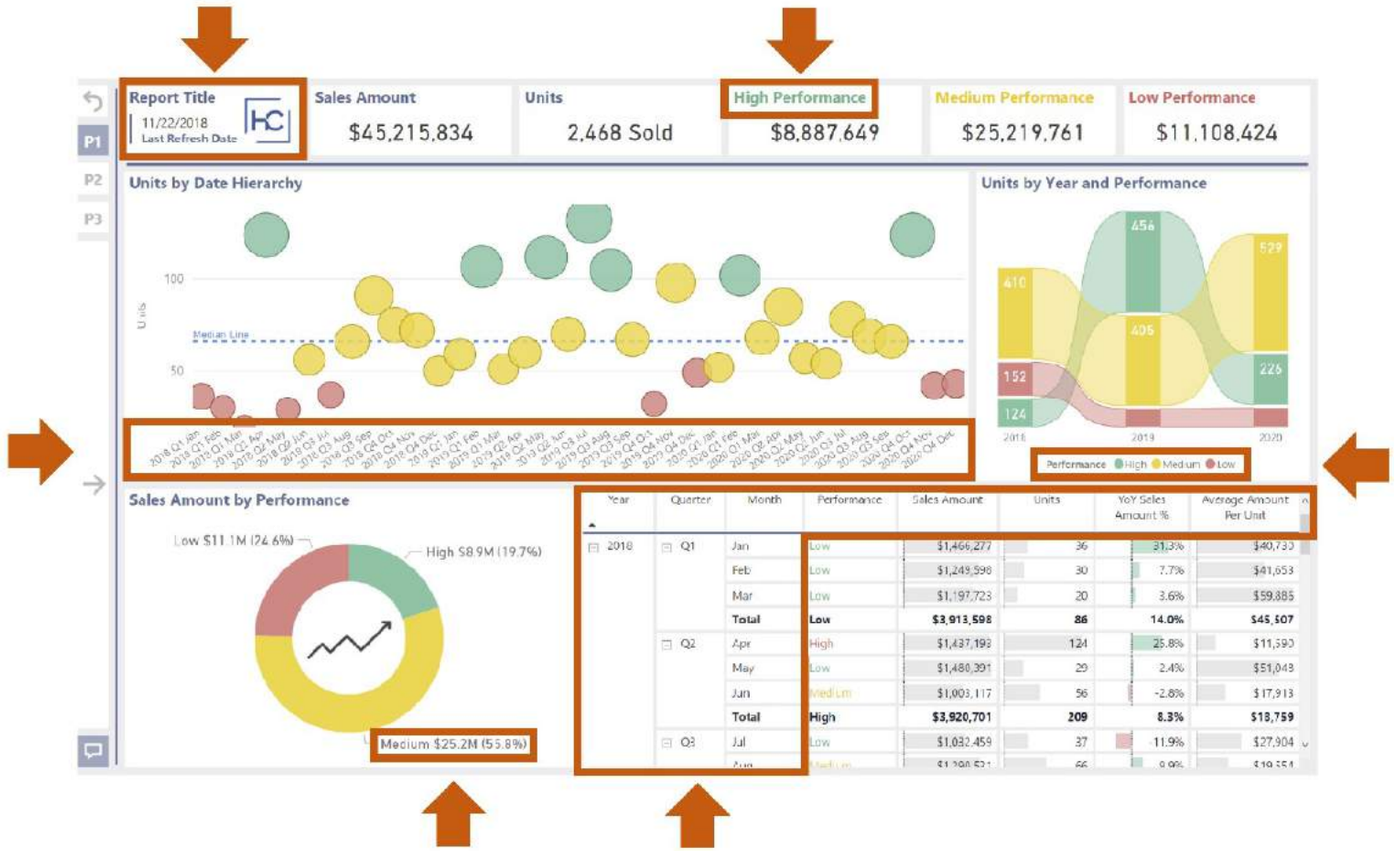
Essential Report Components ► Information

Defining information

- Gives meaning to visualizations
- Provides context for the report

Types of information

- Visualization details
  - Axis
  - Data labels
  - Legend
  - Title
  - Row / column headers
- Report context
  - Report title
  - Refresh date(s)



VISUALS NEED INFO TO PROVIDE A COMPLETE STORY

Defining a Report

Essential Report Components ► Filters

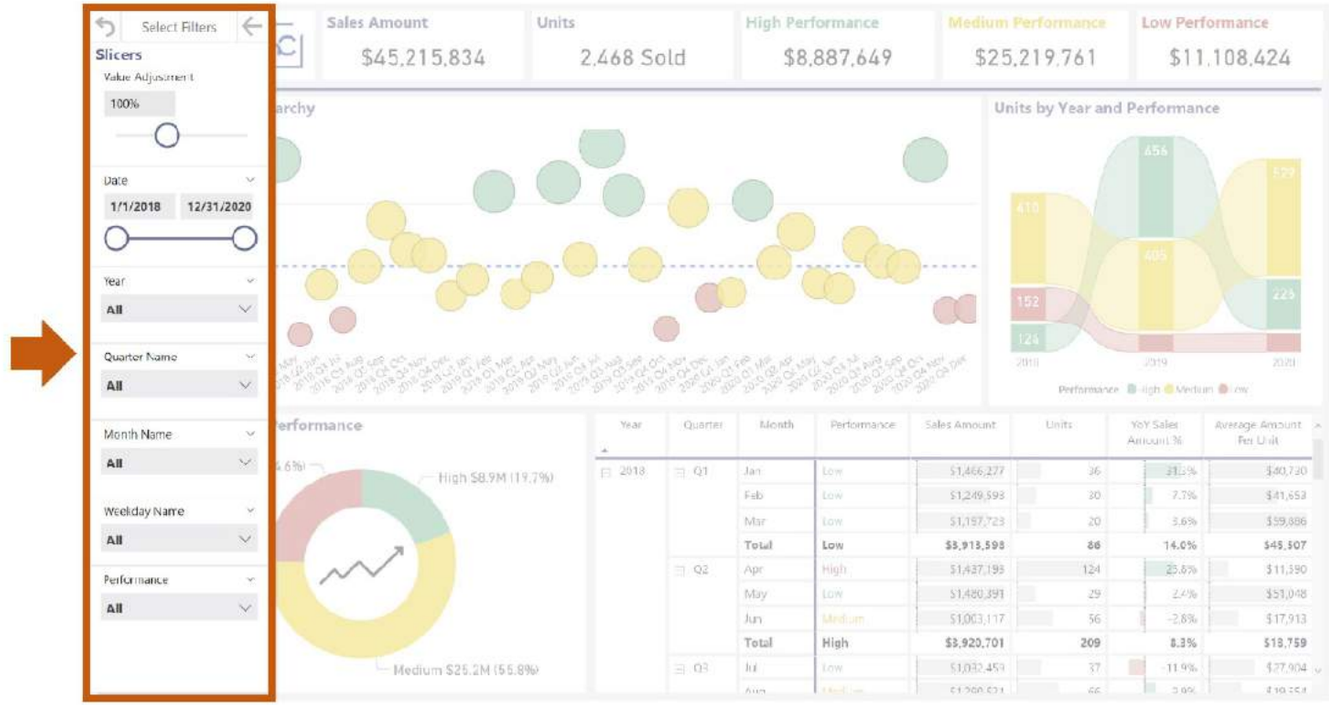
Defining filters

- Allows users to filter on different data segments
- Provides report interactions to derive insights from data

Types of filters

Report slicers

- Objects that can filter in various ways based on data type



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Essential Report Components ► Filters

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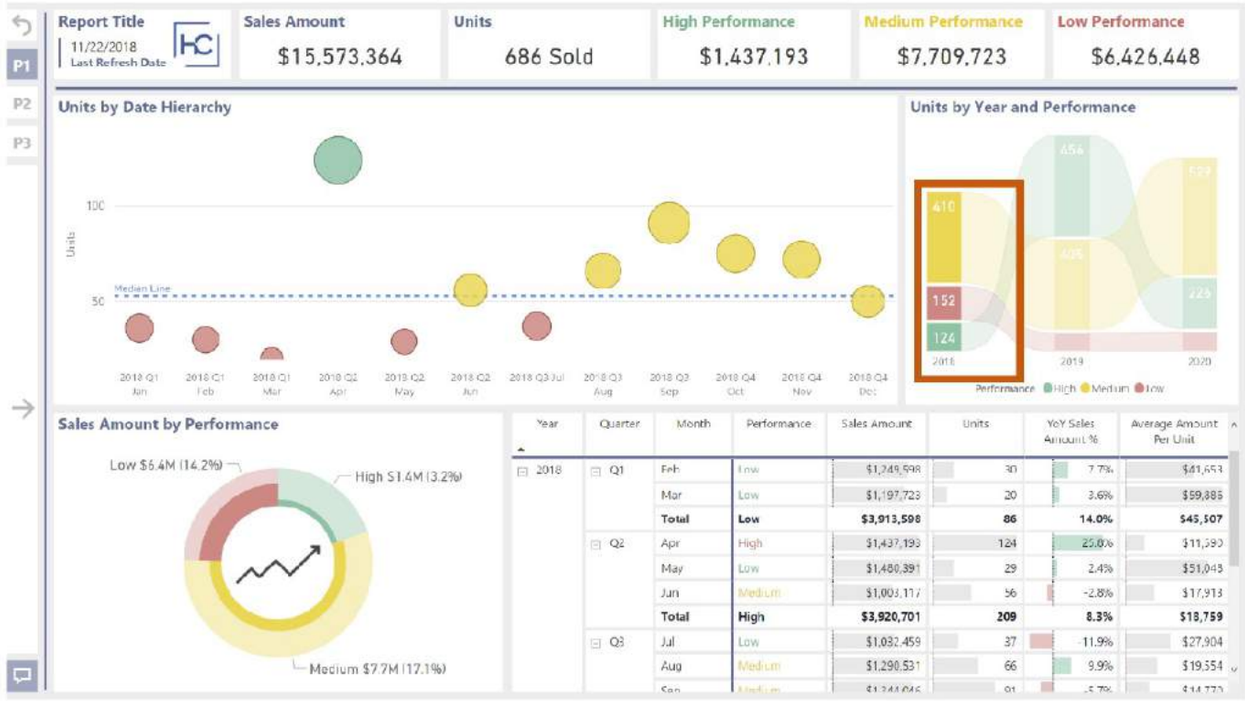
Visual cross-filters

- Visual category selection that cross-filters other objects

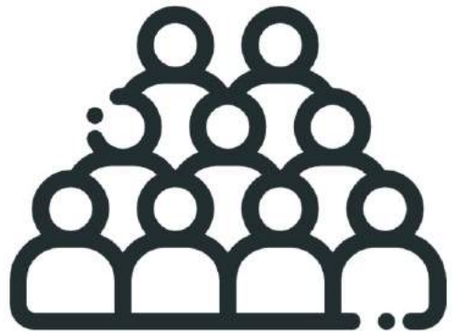


Defining a Report

Primary Report Types

Know your audience

- Audience determines the **type of report** to build, what to include, and what not to include
- There are different types of primary reports to build, and **levels of detail** to consider, depending on the audience



Types of reports

Operational

- Shows up-to-date metrics related to business process
- Notifies users when data deviates from acceptable standards

Strategic

- Shows key information to measure the health of the organization
- Helps identify areas for improvement or organizational changes

Analytical

- Provides data to identify patterns and trends across time or categories
- Contains larger datasets for discovery and analysis of the data

Less Detailed ⟵ ⟶ More Detailed

Knowledge Check

Three Primary Components of a Report

?

?

?

Questions?

Applying Report Design Principles

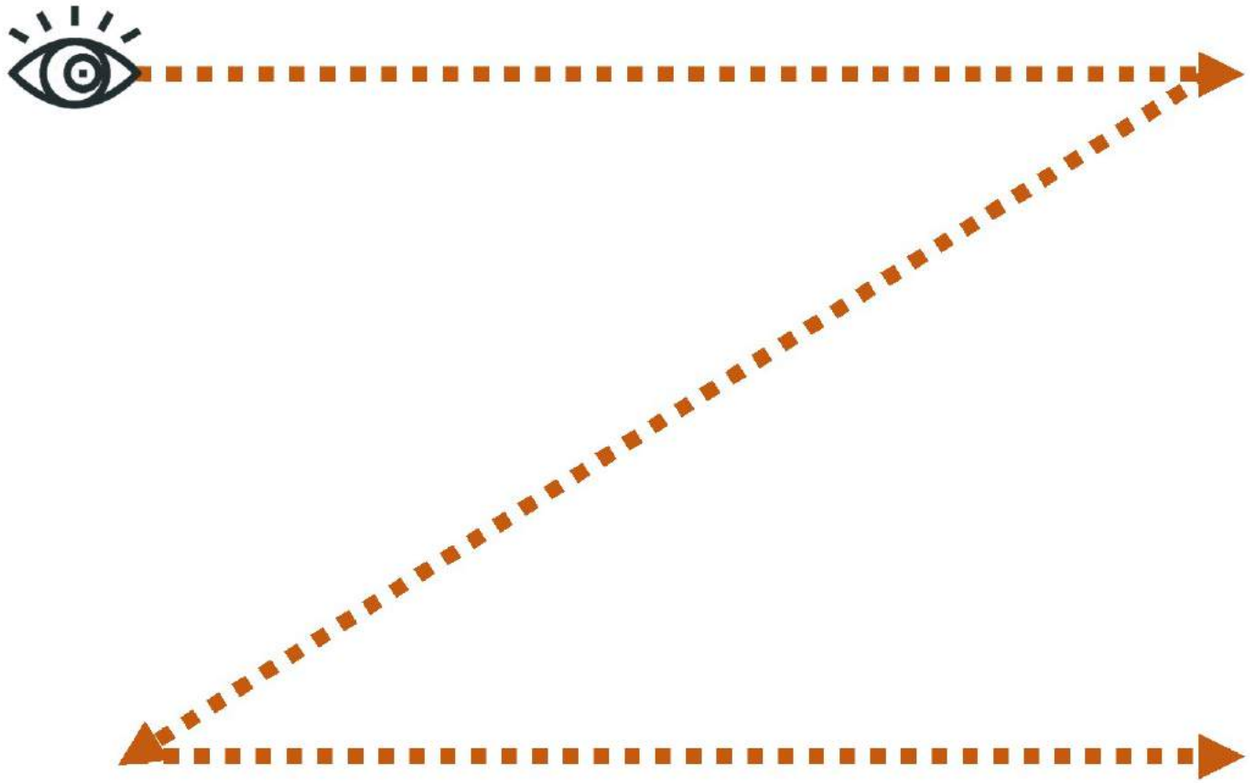
- Information Processing
- Report Organization
- S.C.R.A.P Methodology
- Color Theory
- Visual Cues
- 8 Rules of Power BI Design

Design Principles

Information Processing

How we process information

- **Information is read left to right**
  - Most people are accustomed to read in the direction of **left to right**.

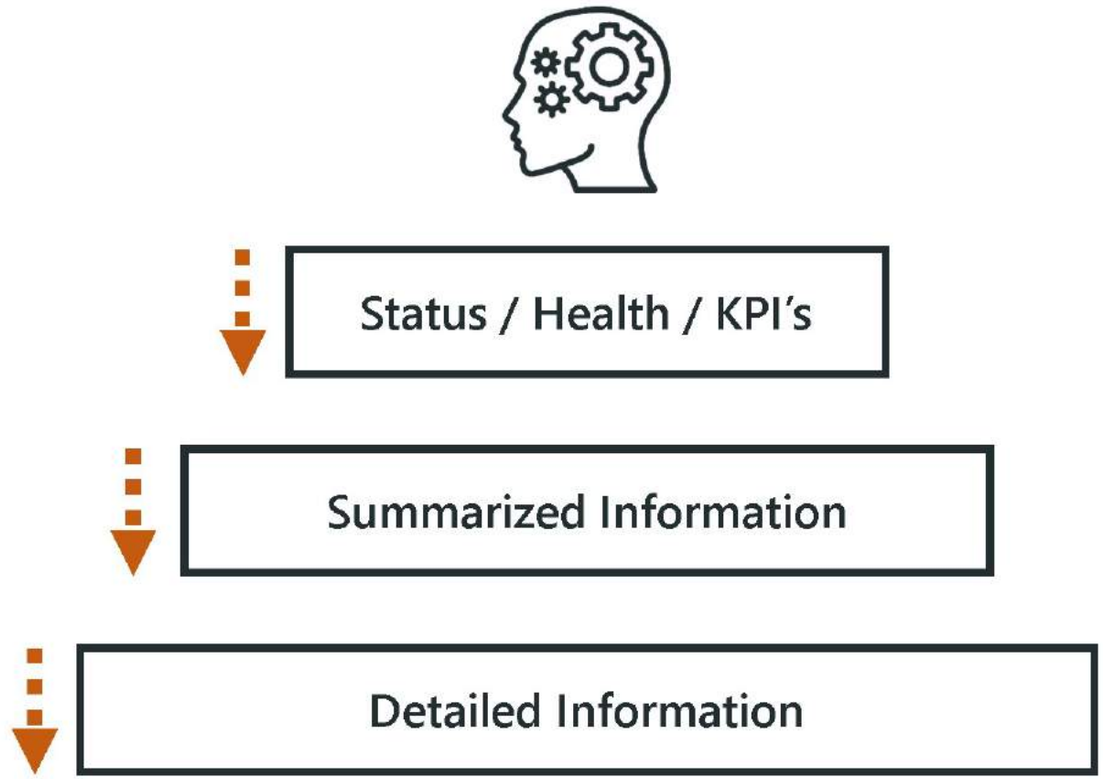


Design Principles

Information Processing

How we process information

- **Information is read left to right**
  - Most people are accustomed to read in the direction of **left to right**
- **Data is analyzed from the top down**
  - People typically look at summarized data **first**, before seeking further information
- **Application of Principles**
  - Leveraging these two principles in report design will create more **effective reports**

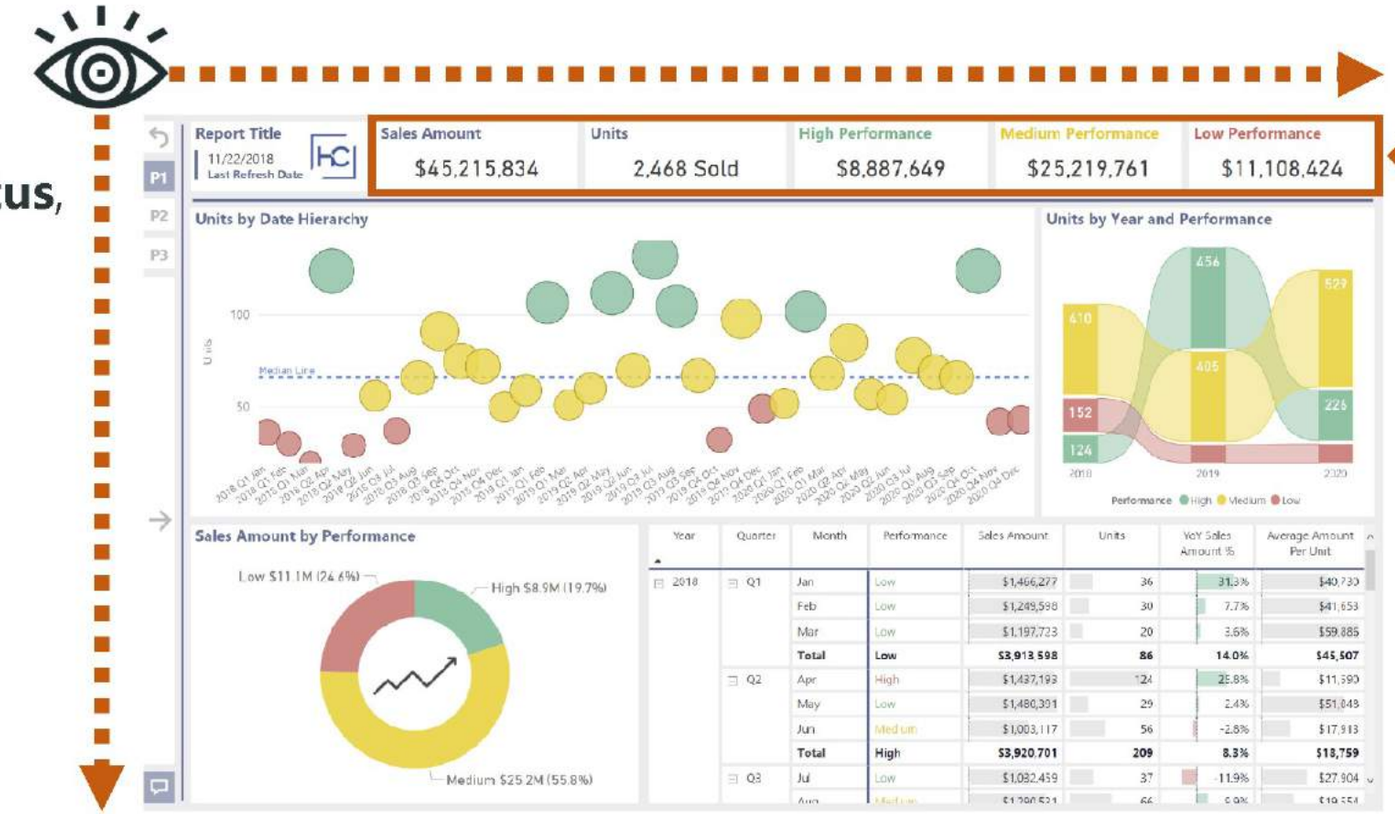


Design Principles

Information Processing ► Effective Report Organization

The data processing flow

1. **Key Performance Indicators (KPI's)**
   - Information pertaining to the **status**, **performance**, or **health** of the organization

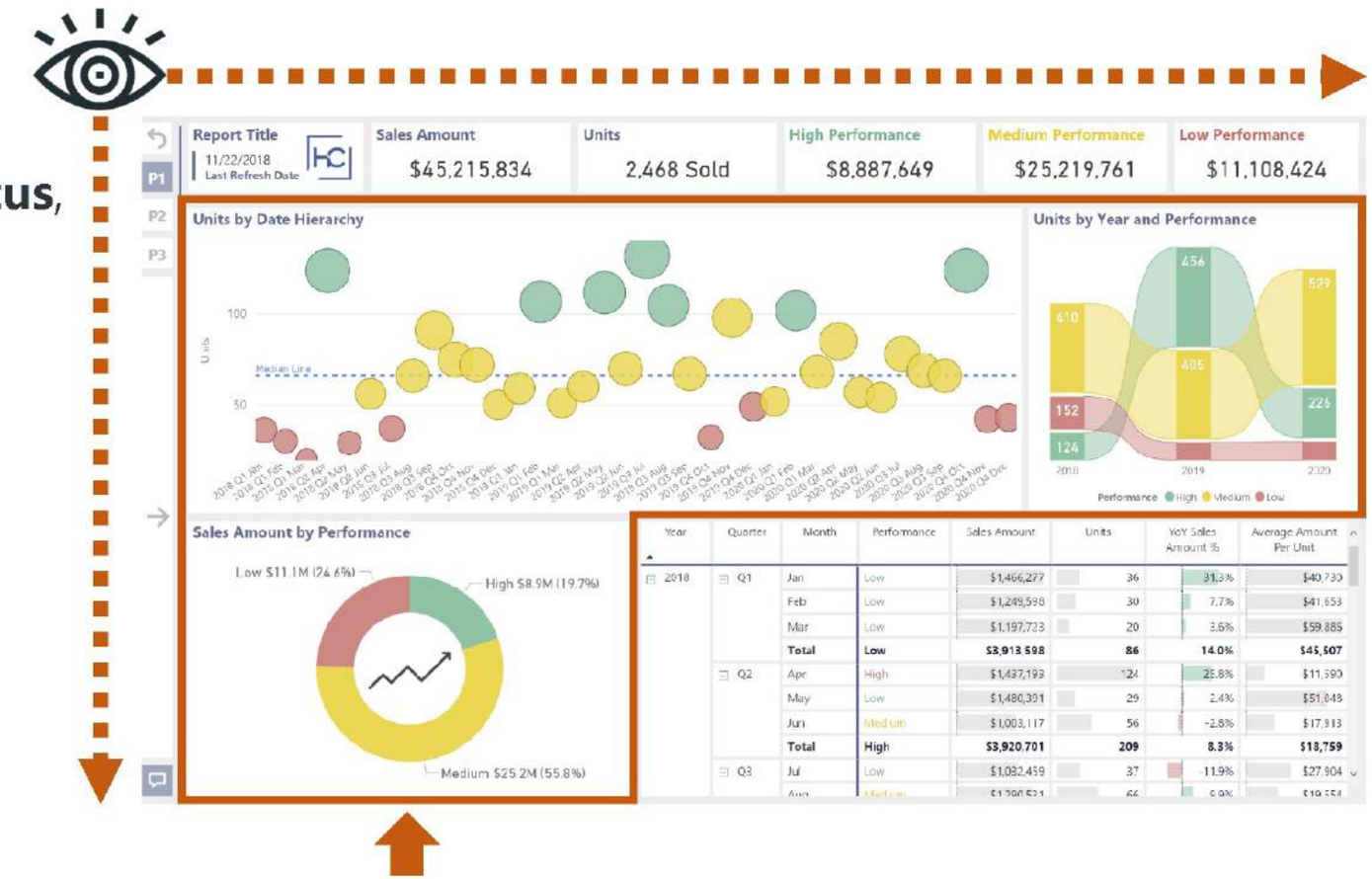


Design Principles

Information Processing ► Effective Report Organization

The data processing flow

1. **Key Performance Indicators (KPI's)**
   - Information pertaining to the **status**, **performance**, or **health** of the organization
2. **Summarized Information**
   - Visuals displaying **patterns** or **trends** in the data. Allowing additional insights to the KPI's

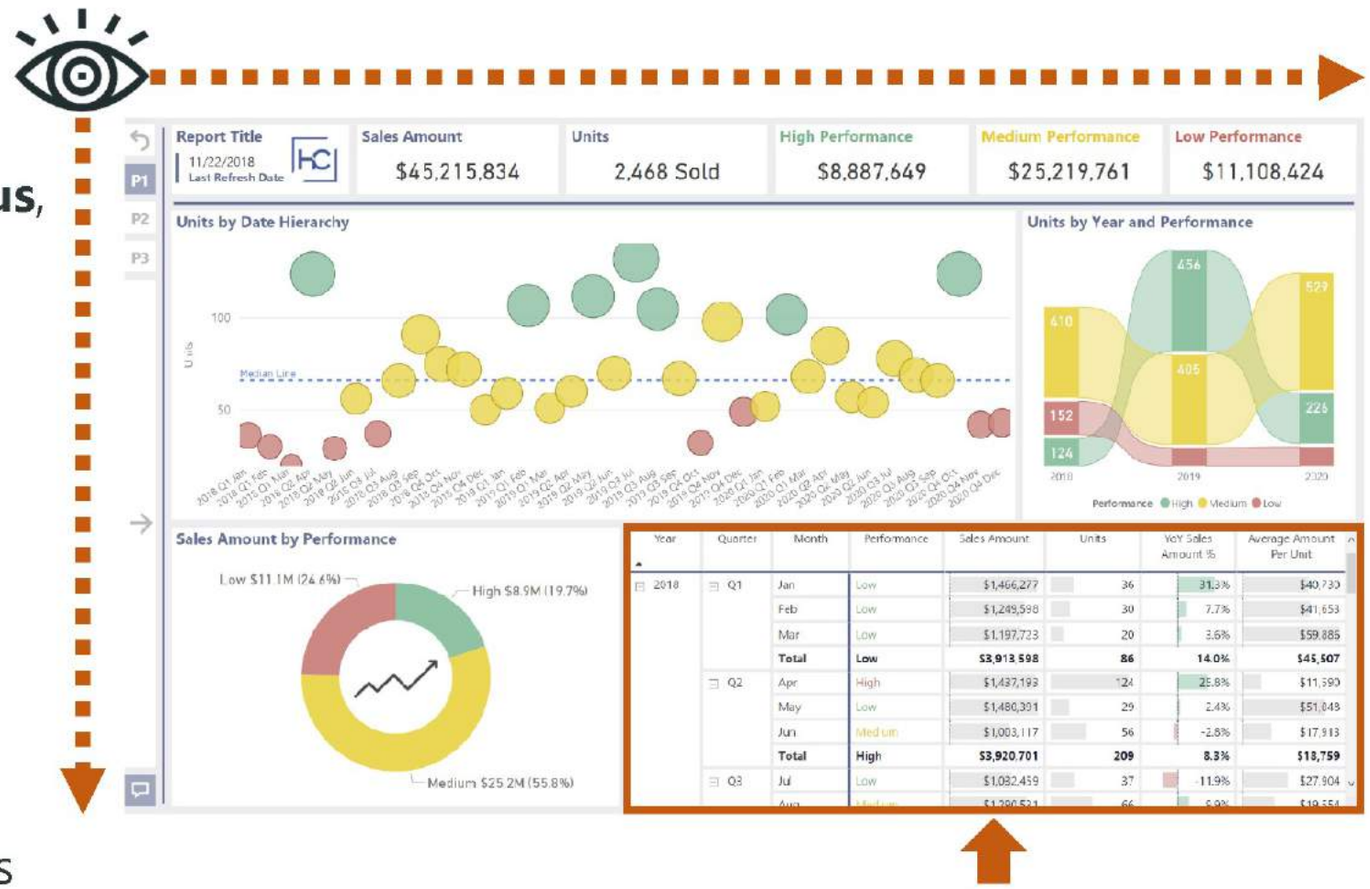


Design Principles

Information Processing ► Effective Report Organization

The data processing flow

1. **Key Performance Indicators (KPI's)**
   - Information pertaining to the **status**, **performance**, or **health** of the organization
2. **Summarized Information**
   - Visuals displaying **patterns** or **trends** in the data. Allowing additional insights to the KPI's
3. **Detailed Information**
   - Tables containing **specific detail** about the patterns or trends. Providing **explanation** to variances in the data



Design Principles

The S.C.R.A.P Methodology

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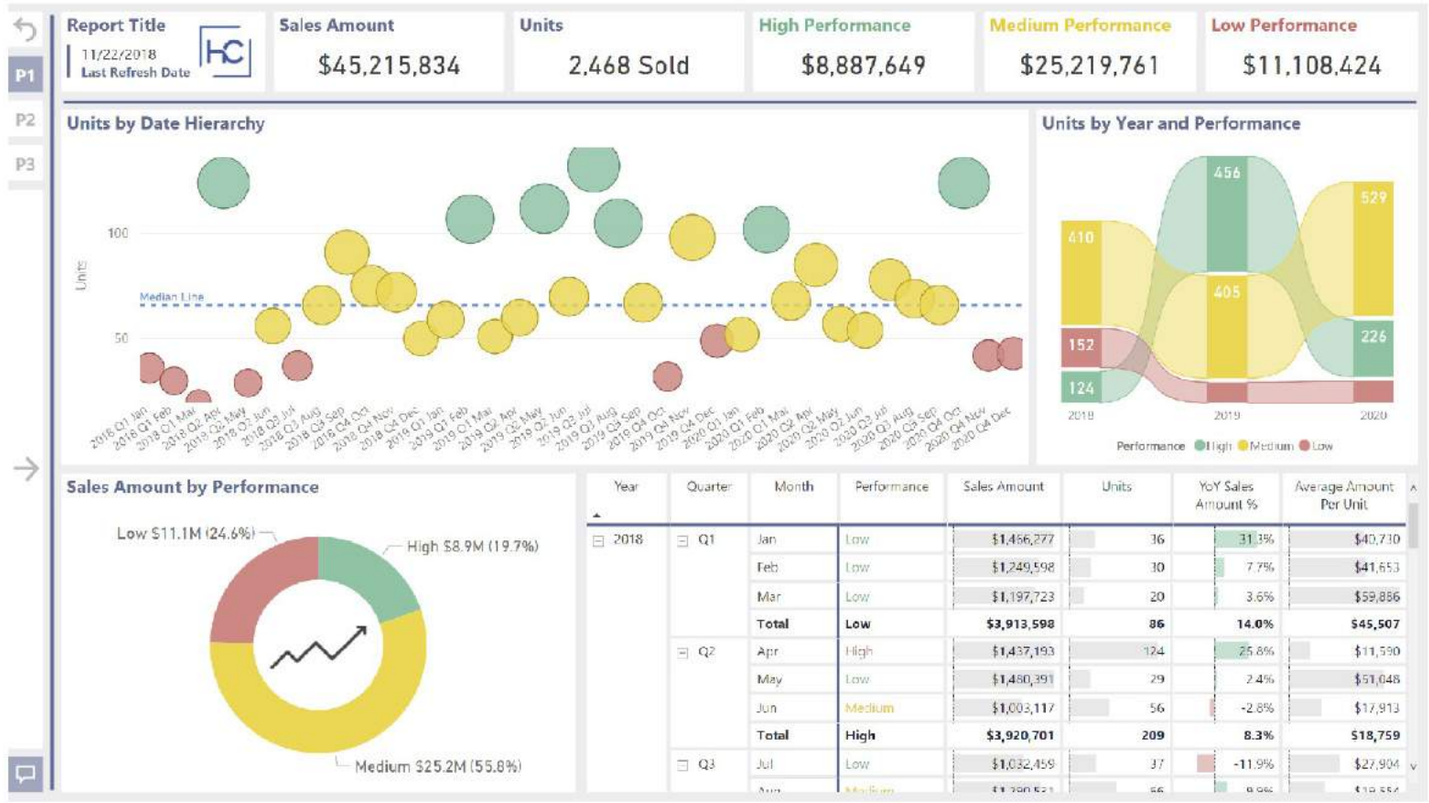
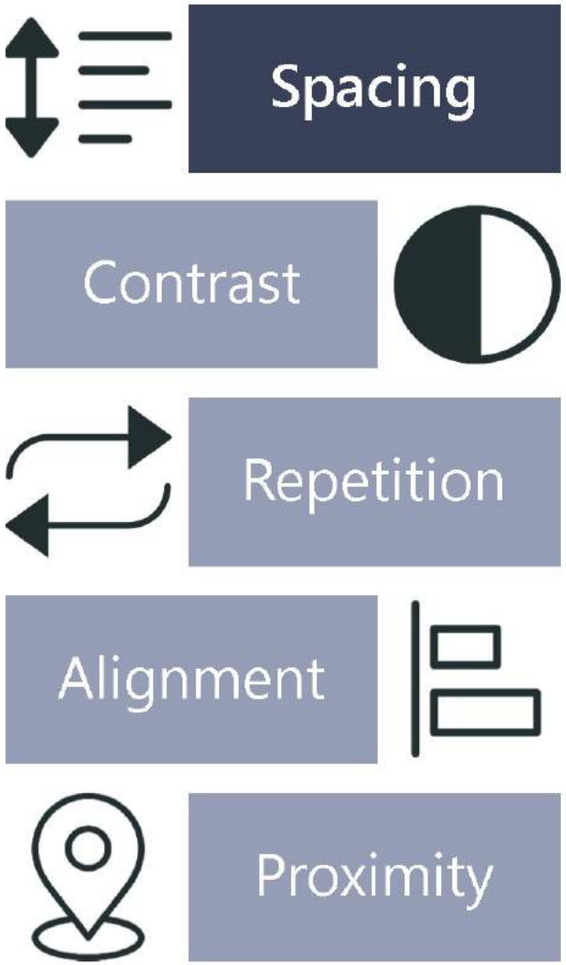
- Spacing
- Contrast
- Repetition
- Alignment
- Proximity

Report with applied methodologies



Design Principles

The S.C.R.A.P Methodology ► Spacing



General concept

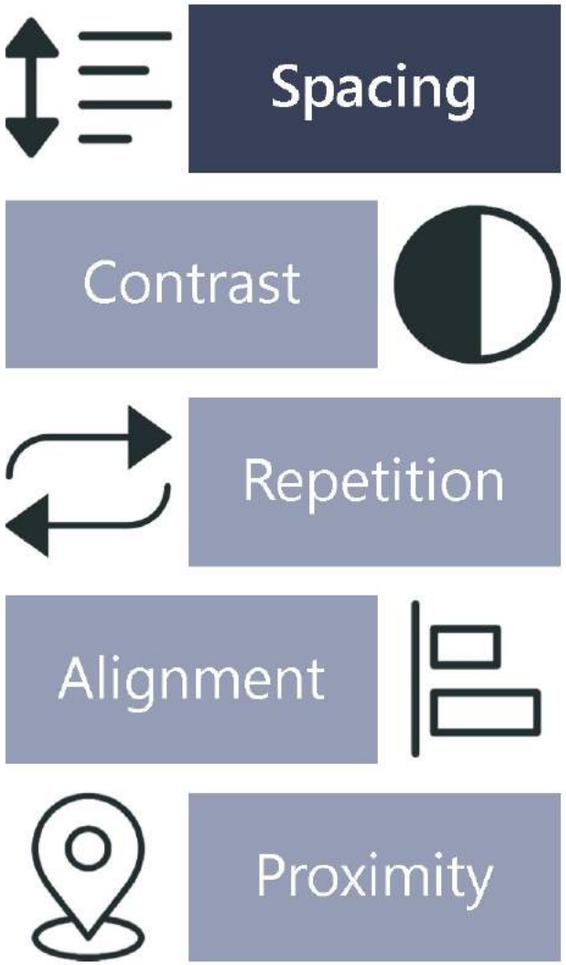
- **Space surrounding** or **between** the objects. Also known as **negative space**
- **Increases readability** by showing boundaries within objects

Spacing

No Spacing

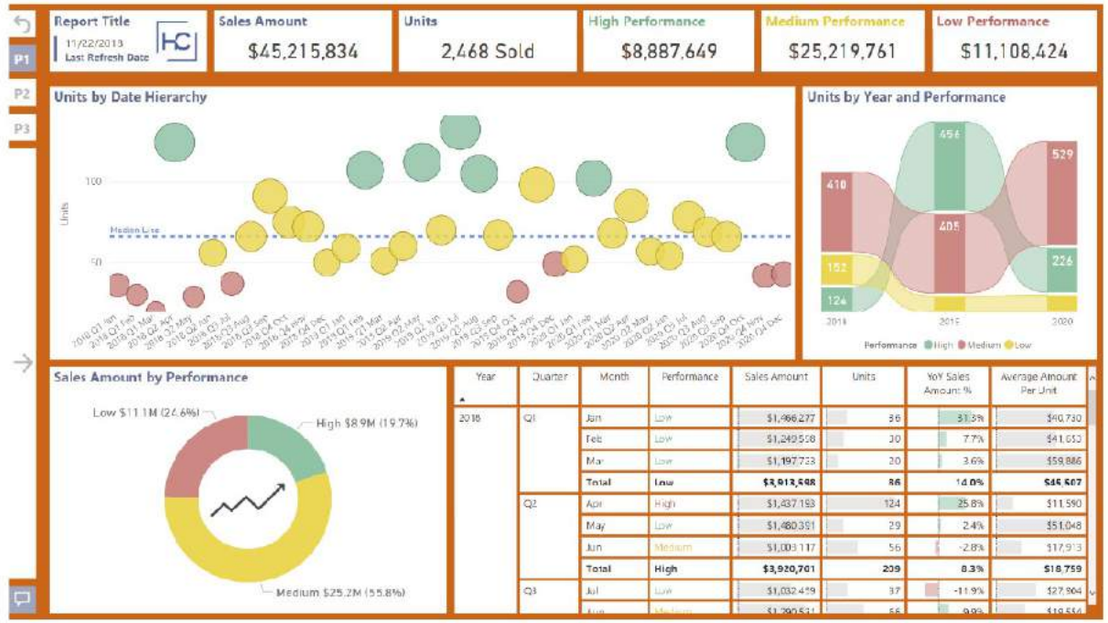
Design Principles

The S.C.R.A.P Methodology ► Spacing



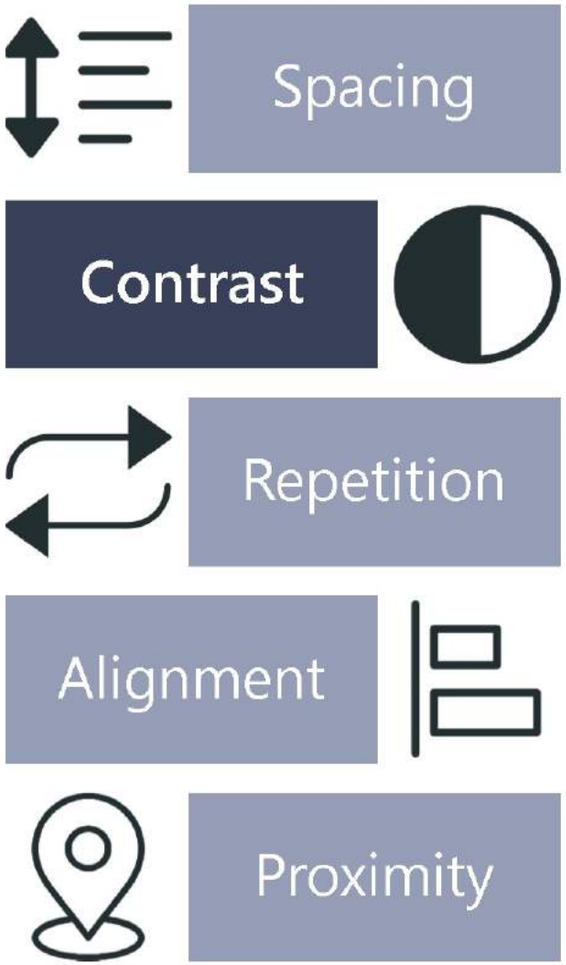
General concept

- **Space surrounding** or **between** the objects. Also known as **negative space**
- **Increases readability** by showing boundaries within objects
- Creates **clear boundaries** between objects



Design Principles

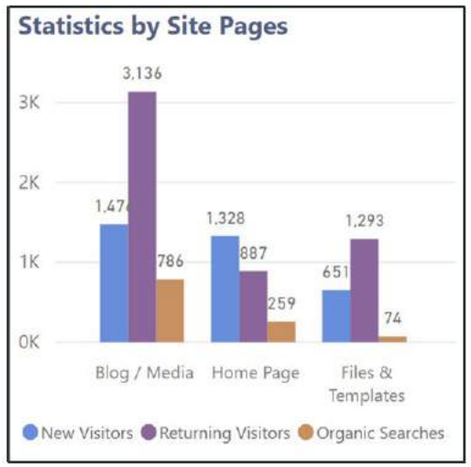
The S.C.R.A.P Methodology ► Contrast



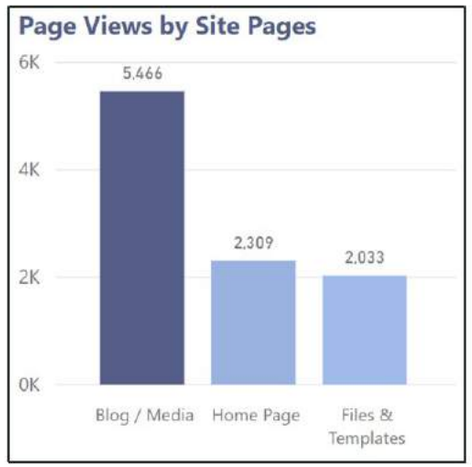
General concept

- Distinguishes elements to help **identify categories** or emphasize **key findings**

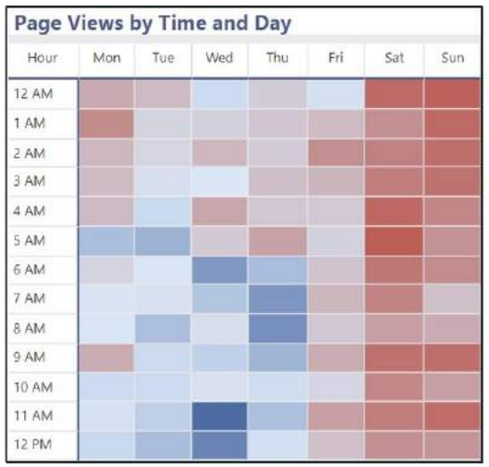
Categorical Colors



Sequential Colors

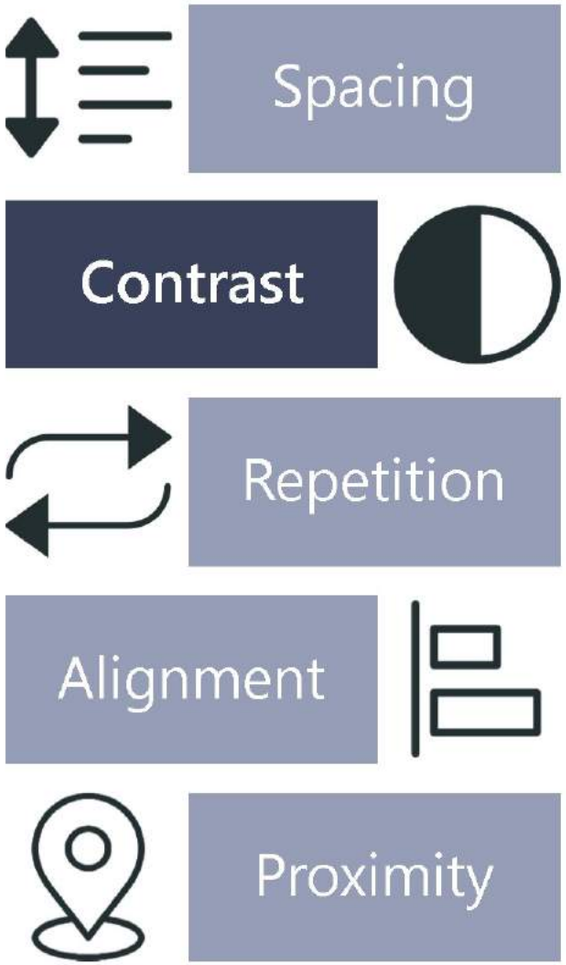


Diverging Colors



Design Principles

The S.C.R.A.P Methodology ► Contrast

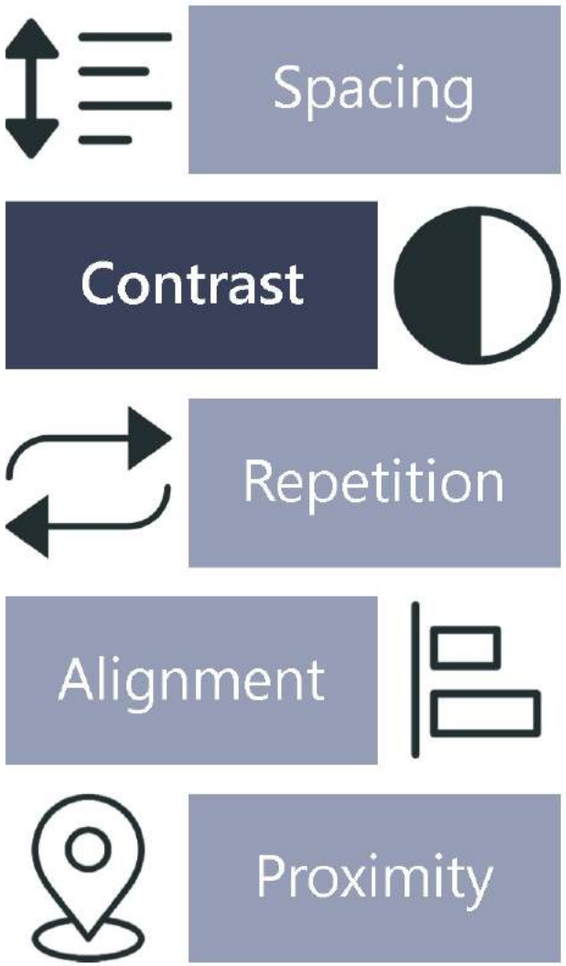


General concept

- Distinguishes elements to help **identify categories** or emphasize **key findings**
- **Color** is one of the most common forms of contrast

Design Principles

The S.C.R.A.P Methodology ► Contrast



General concept

- Distinguishes elements to help **identify categories** or emphasize **key findings**
- **Color** is one of the most common forms of contrast
- Contributes to the **squint test** requirements

Design Principles

The S.C.R.A.P Methodology ► Repetition

Spacing

Contrast

Repetition

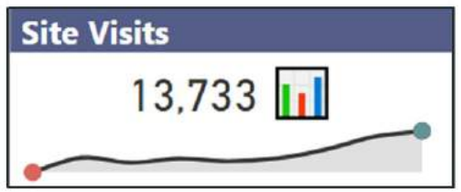
Alignment

Proximity

General concept

- Applying a **consistent pattern** or elements throughout the report design

Repetition

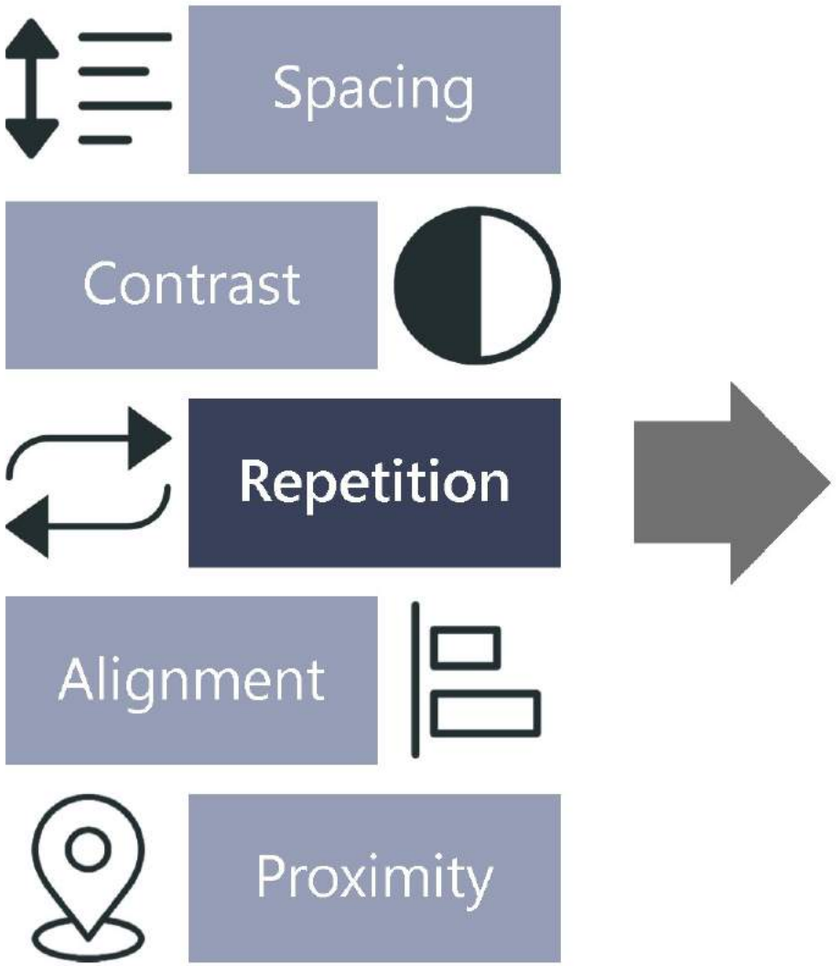


Repetition

No Repetition

Design Principles

The S.C.R.A.P Methodology ► Repetition



General concept

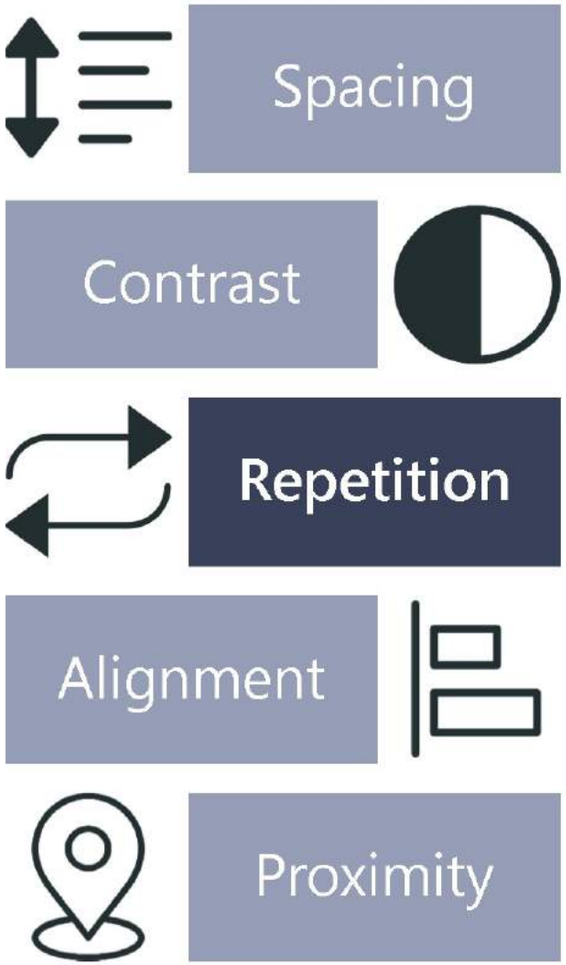
- Applying a **consistent pattern** or elements throughout the report design

No Repetition

Site Pages	Page Views	Unique Views	Searches	New Visitors	Returning Visitors
Blog / Media	5,466	4,550	786.0	1,476	3,136
Home Page	2,309	1,932	259.0	1,328	887
Files & Templates	2,033	1,644	74.0	651	1,293
Power BI Vs. Excel	1,658	1,535	1,123.0	1,193	434
About Us	786	673	324.0	358	404
What Is Power BI?	501	412	129.0	178	300
Consulting Services	313	267	10.0	25	275
Contact & Support	210	187	2.0	18	184
Online Courses	129	120	1.0	13	116
Total	**13,405**	**11,320**	**2,708.0**	**5,240**	**7,029**

Design Principles

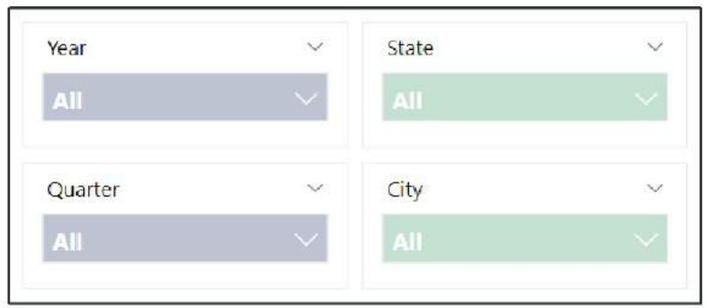
The S.C.R.A.P Methodology ► Repetition



General concept

- Applying a **consistent pattern** or elements throughout the report design
- Repetition can also **increase readability** by applying a specific pattern to groups, categories, or areas of a report

Repetition



No Repetition

Design Principles

The S.C.R.A.P Methodology ► Alignment

Spacing

Contrast

Repetition

Alignment

Proximity

General concept

- **Edges of objects** are aligned with the edges of other objects
- Creates the perception that every object is **connected via an invisible line**, and that nothing is placed at random

Alignment

No Alignment

Design Principles

The S.C.R.A.P Methodology ► Proximity

Spacing

Contrast

Repetition

Alignment

Proximity

General concept

- **Group related objects** together to show a relationship
- Applicable to **objects within a report**

Proximity

New Site Visitors	Returning Visitors	Total Visitors	Organic Searches
5,268	7,317	12,585	2,712

No Proximity

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Design Principles

The S.C.R.A.P Methodology ► Proximity

Spacing

Contrast

Repetition

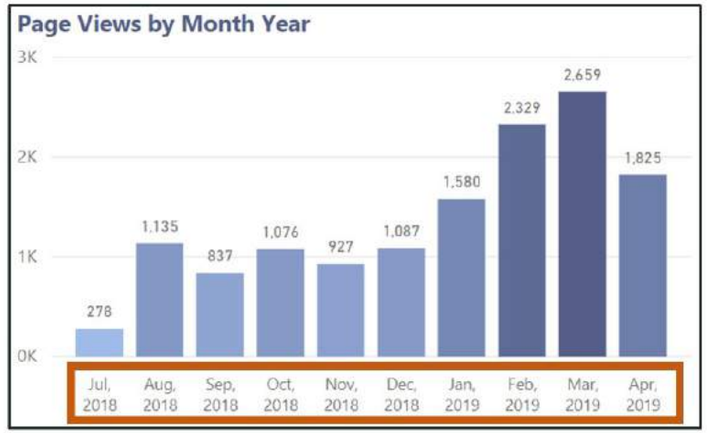
Alignment

Proximity

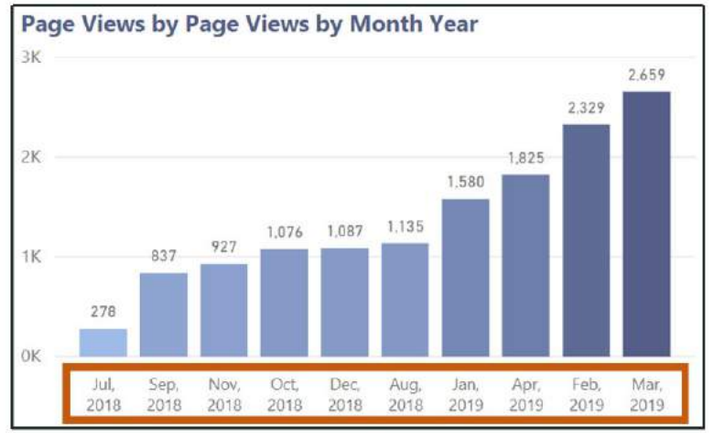
General concept

- **Group related objects** together to show a relationship
- Applicable to **objects within a report**
- Applicable to **elements within an object**

Proximity



No Proximity



Design Principles

Color Theory

Color wheel definition

- Visual representation of **color hues** arranged according to their **chromatic relationship**

The color wheel

Design Principles

Color Theory

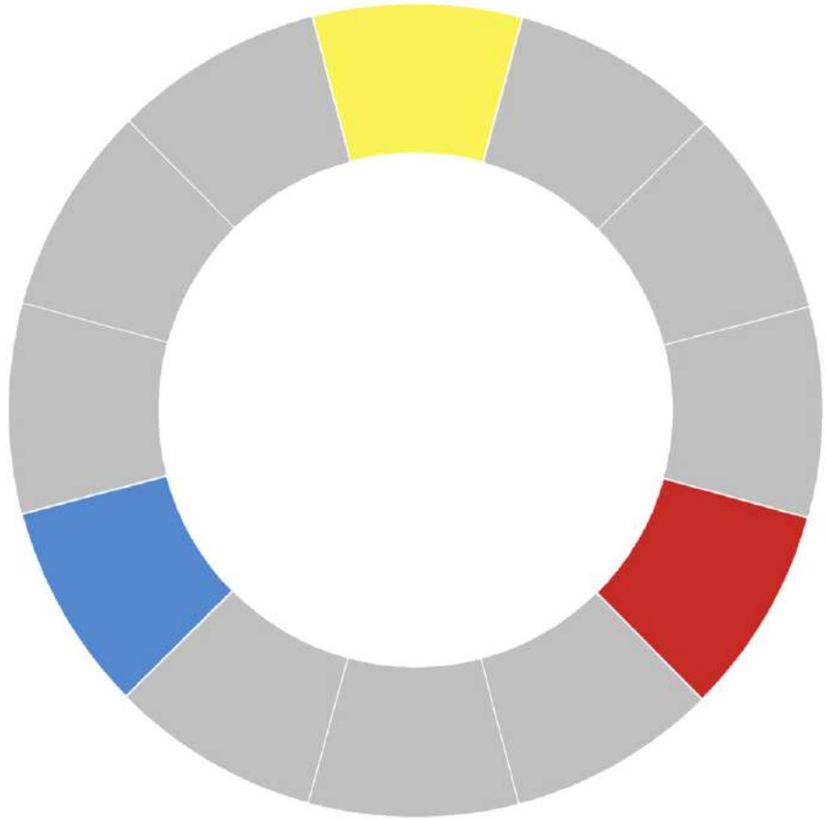
Color wheel definition

- Visual representation of **color hues** arranged according to their **chromatic relationship**

Primary vs. secondary colors

- Primary colors
  - **Cannot be created** by combining two or more colors together
  - All other colors are derived from these hues

The color wheel



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Color Theory

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- Visual representation of **color hues** arranged according to their **chromatic relationship**

Primary vs. secondary colors

- Primary colors
  - **Cannot be created** by combining two or more colors together
  - All other colors are derived from these hues
- Secondary colors
  - Colors that are formed by **combining** the primary colors

The color wheel

Design Principles

Color Theory ► Color Harmony

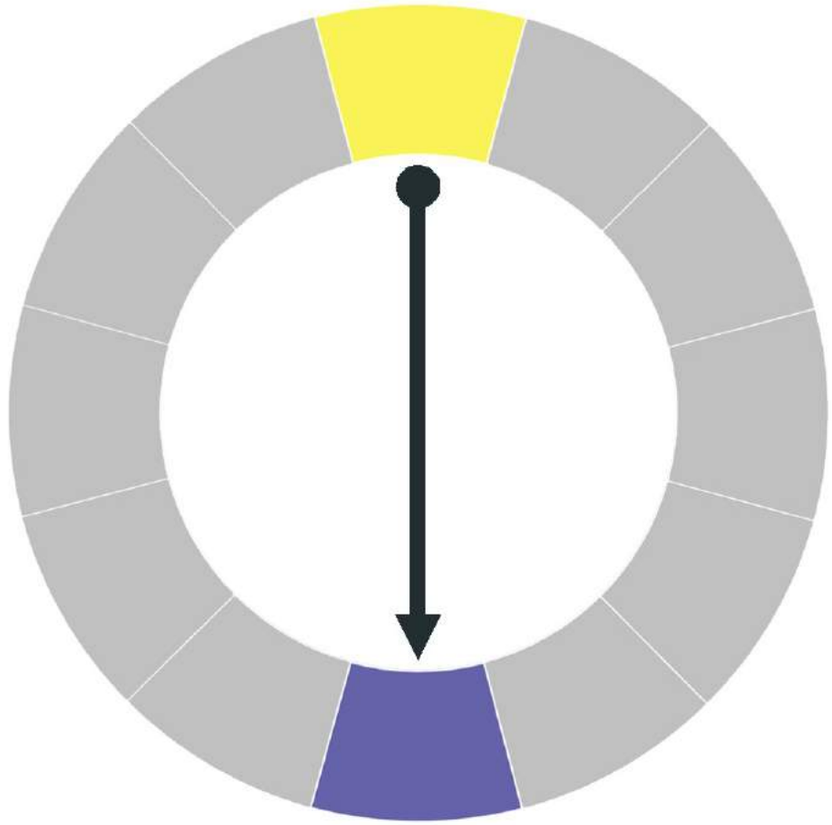
Color harmony definition

- Using a **combination of colors** that is **harmonious** to the human eye

Types of color harmony

- Complementary
  - Most basic type of harmony. It is the **opposite point** of the key color on the wheel.
  - Most other harmonies are **variations of this harmony** (apart from the analogous harmony)

The color wheel



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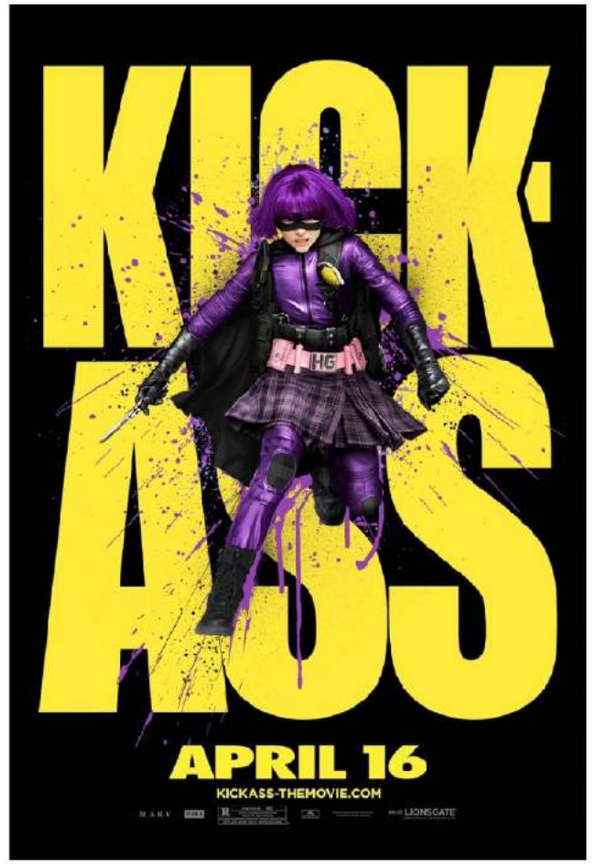


Design Principles

Color Theory ► Color Harmony

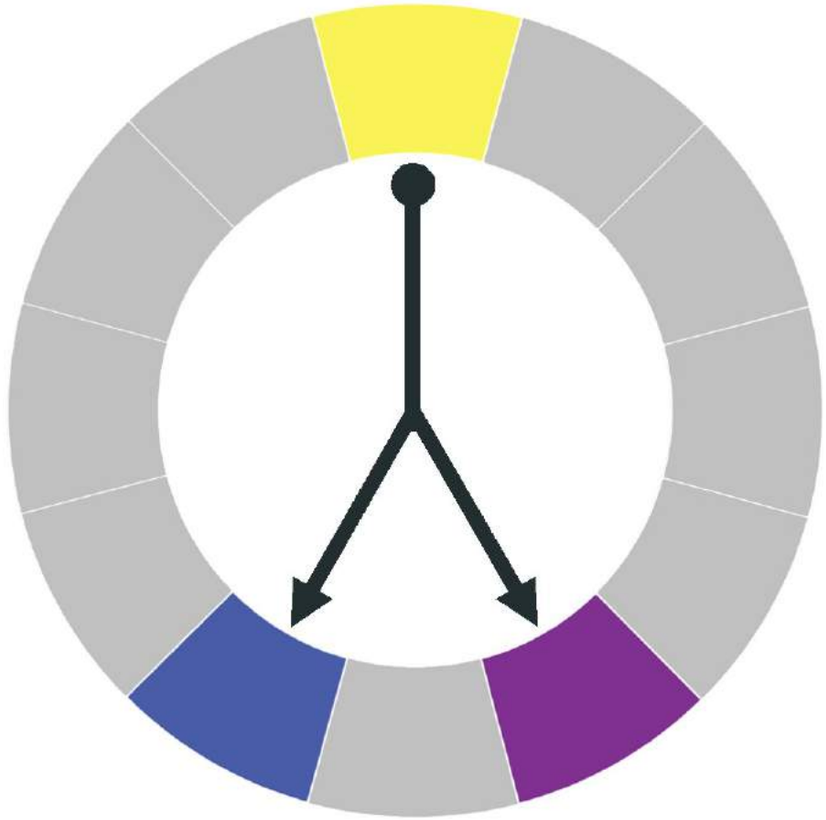
Color harmony definition

- Using a **combination of colors** that is **harmonious** to the human eye

Types of color harmony

- Split complementary
  - Uses the colors **one space away** from the key color.
  - Allows for a **broader range of colors**, while maintaining the basic harmony between the complementary colors

The color wheel



Design Principles

Color Theory ► Color Harmony

Color harmony definition

- Using a **combination of colors** that is **harmonious** to the human eye

Types of color harmony

- Split complementary
  - Uses the colors **one space away** from the key color.
  - Allows for a **broader range of colors**, while maintaining the basic harmony between the complementary colors

The color wheel

Design Principles

Color Theory ► Color Harmony

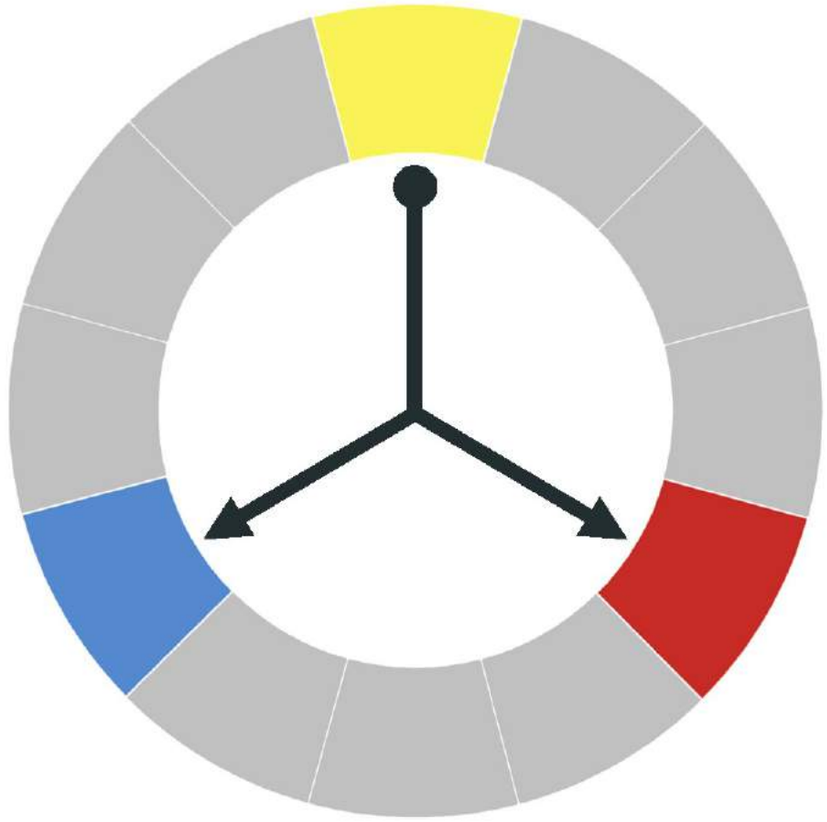
Color harmony definition

- Using a **combination of colors** that is **harmonious** to the human eye

Types of color harmony

- Triadic
  - Uses the colors **two spaces** away from the key color
  - Essentially allows the use of **three equidistant colors** on the wheel
  - Further apart, and therefore **less harmonious**

The color wheel



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Design Principles

Color Theory ► Color Harmony

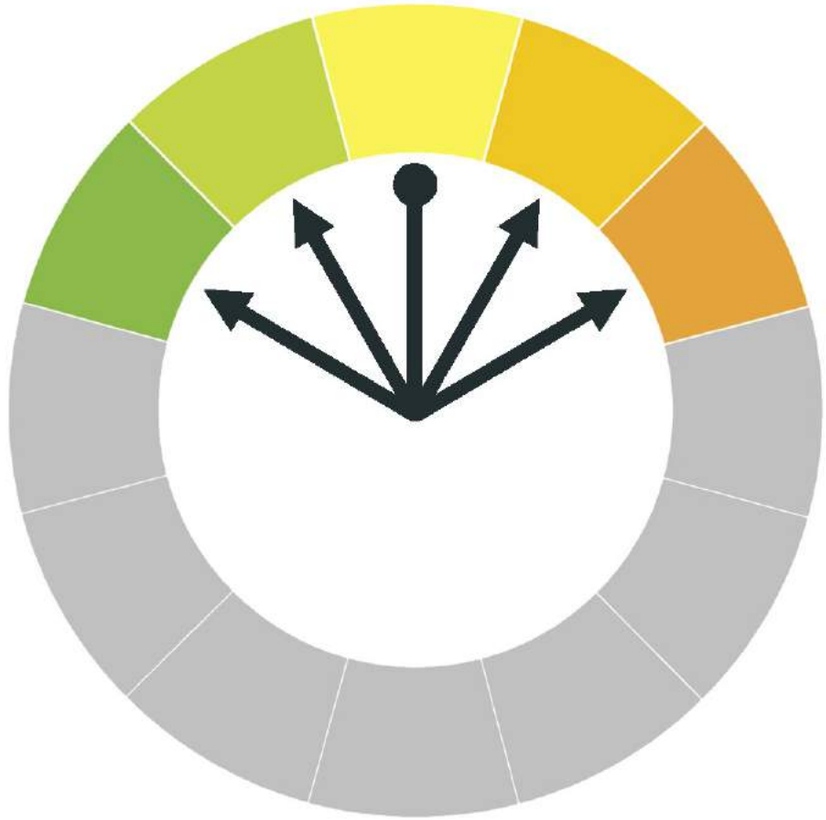
Color harmony definition

- Using a **combination of colors** that is **harmonious** to the human eye

Types of color harmony

- Analogous
  - Colors that are **directly** to the **left or right** of the key color
  - Also known as **related colors**
  - Closest together, with the **least color variation**

The color wheel



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The color wheel

Design Principles

Color Theory ► Color Harmony

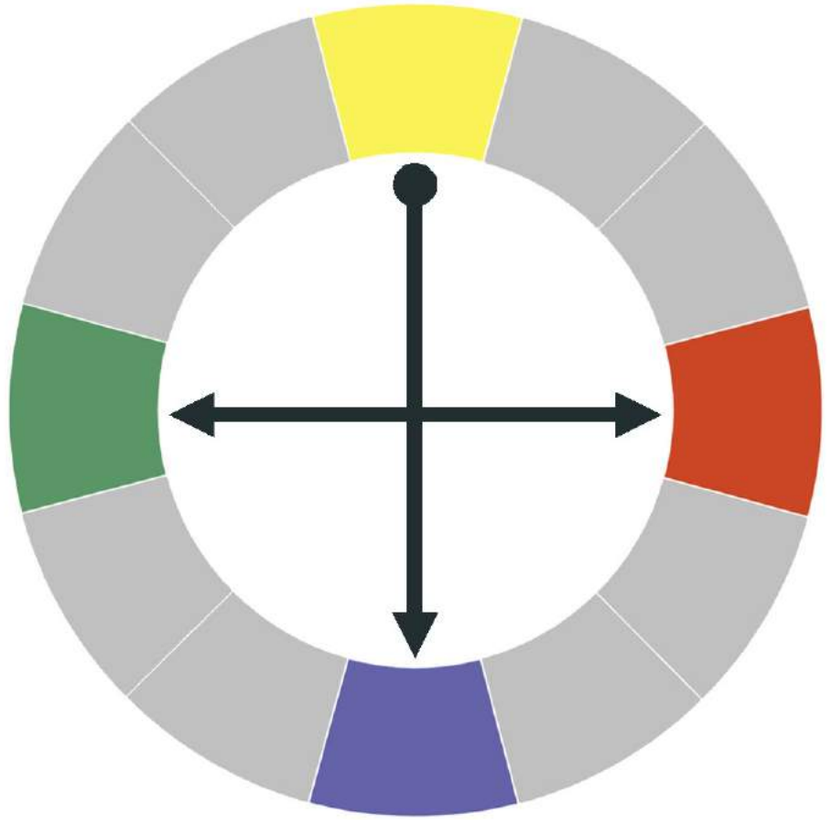
Color harmony definition

- Using a **combination of colors** that is **harmonious** to the human eye

Types of color harmony

- Tetradic
  - Similar to **triadic**, but with **four** colors all **equidistant** on the wheel
  - Essentially is using **two sets** of complementary colors
  - Greatest amount of **color variation**

The color wheel



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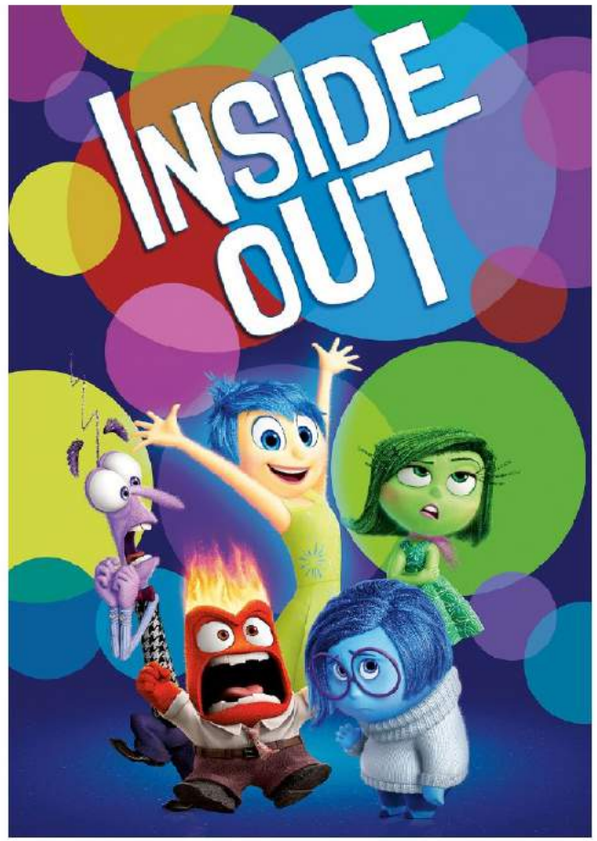


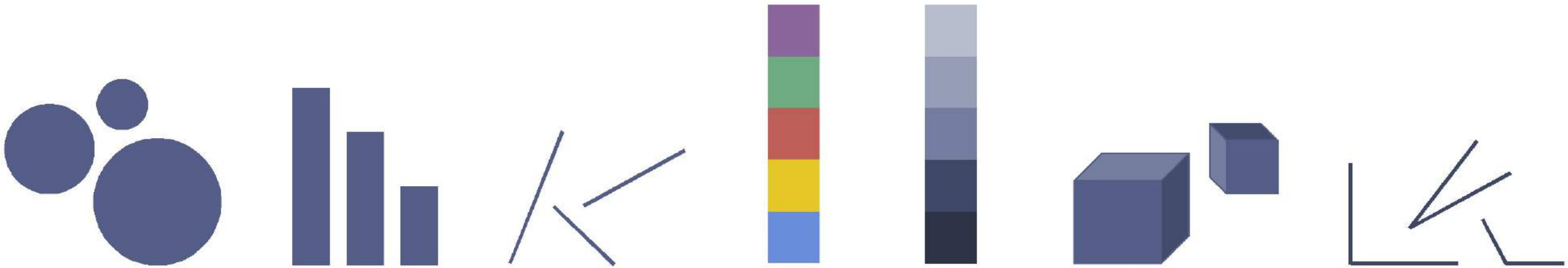
Design Principles

Visual Cues

General methodology

- Visualizations **translate** variances in data by utilizing different visual cues
- Each visual cue is **interpreted** differently by the human brain

Types of visual cues



VISUAL CUES ARE NOT CREATED EQUAL

Design Principles

Visual Cues ► Ranked

General methodology

- Visualizations **translate** variances in data by utilizing different visual cues
- Each visual cue is **interpreted** differently by the human brain

Visual cues ranked by accuracy

Design Principles

Visual Cues ► Accuracy Influencers

What influences accuracy?

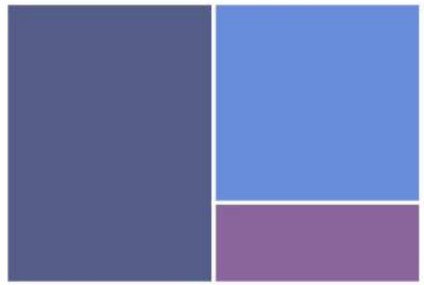
Alignment

- Objects on an **aligned scale** increase accuracy when comparing values
- Studies show length aligned on a single axis is the most accurate representation of data

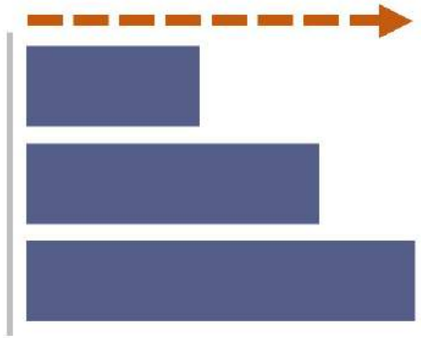
Direction

- Objects on an axis that follow a **single direction** also increase accuracy, when comparing values

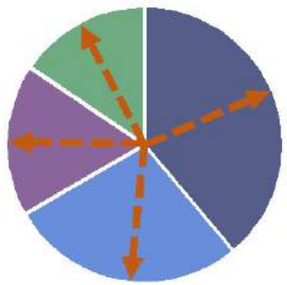
Length (Aligned)



Tree Map



Bar Chart



Pie Chart

Design Principles

Visual Categories

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— FOR MICROSOFT POWER BI —

SEP. 2018

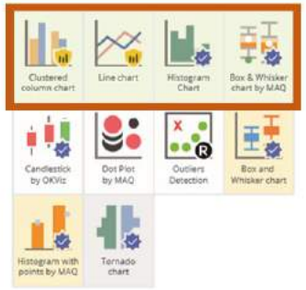
http://sql.bi/visual-reference

PART-TO-WHOLE

Display the parts of a measure

DISTRIBUTION

Display the distribution of a measure



CORRELATION

Display relations between measures

SINGLE

Display single values

FILTER

Control report filters

NARRATIVE

Tell a story with data

MISCELLANEOUS

Recommended | There is a better alternative | Don't use in the category | Built-in visual | Certified visual | R required

Design Principles

Visual Categories

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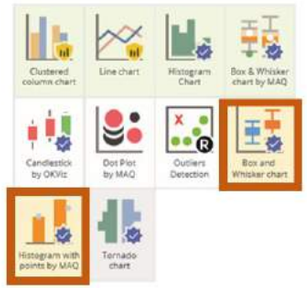

CORRELATION

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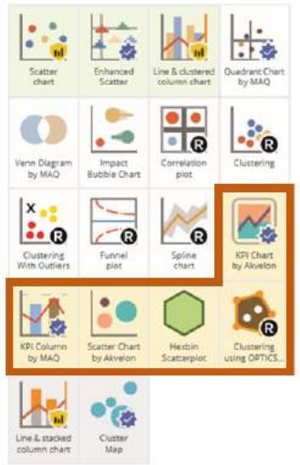

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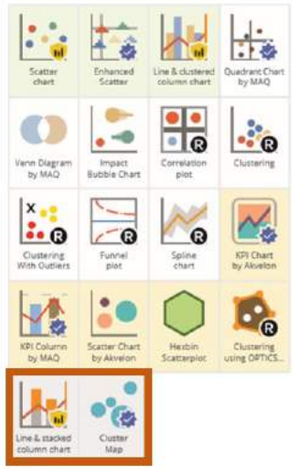

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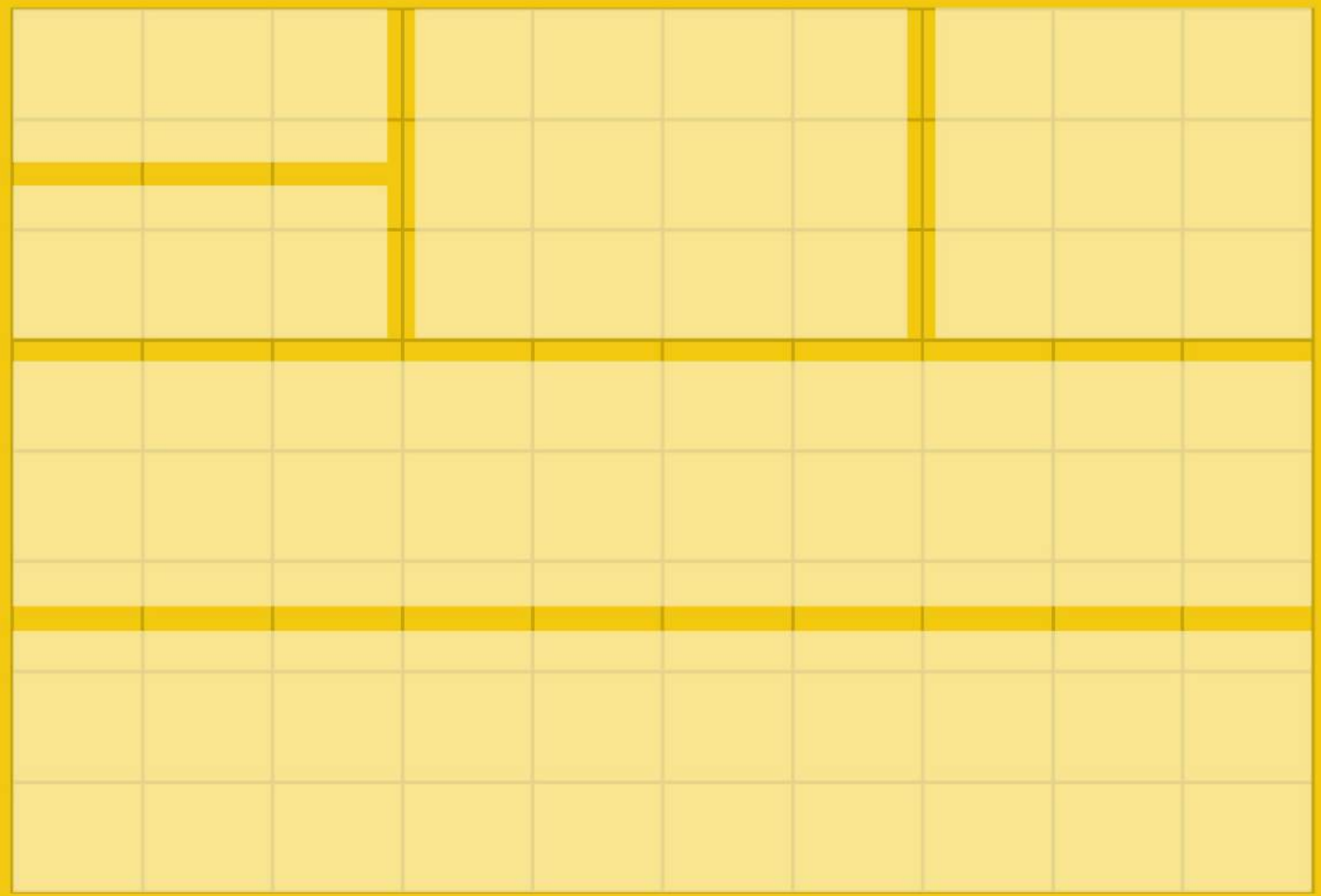
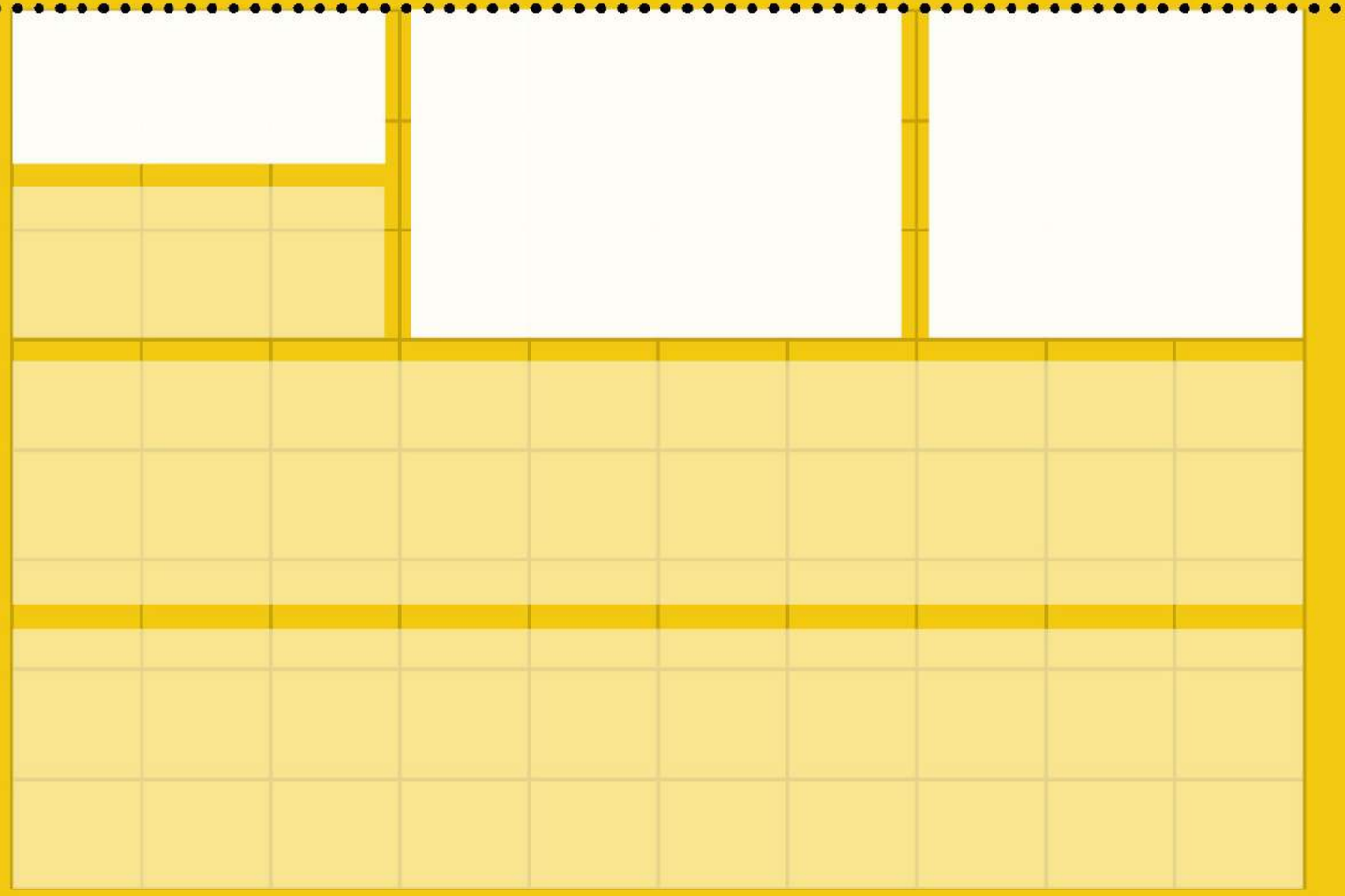
8 RULES

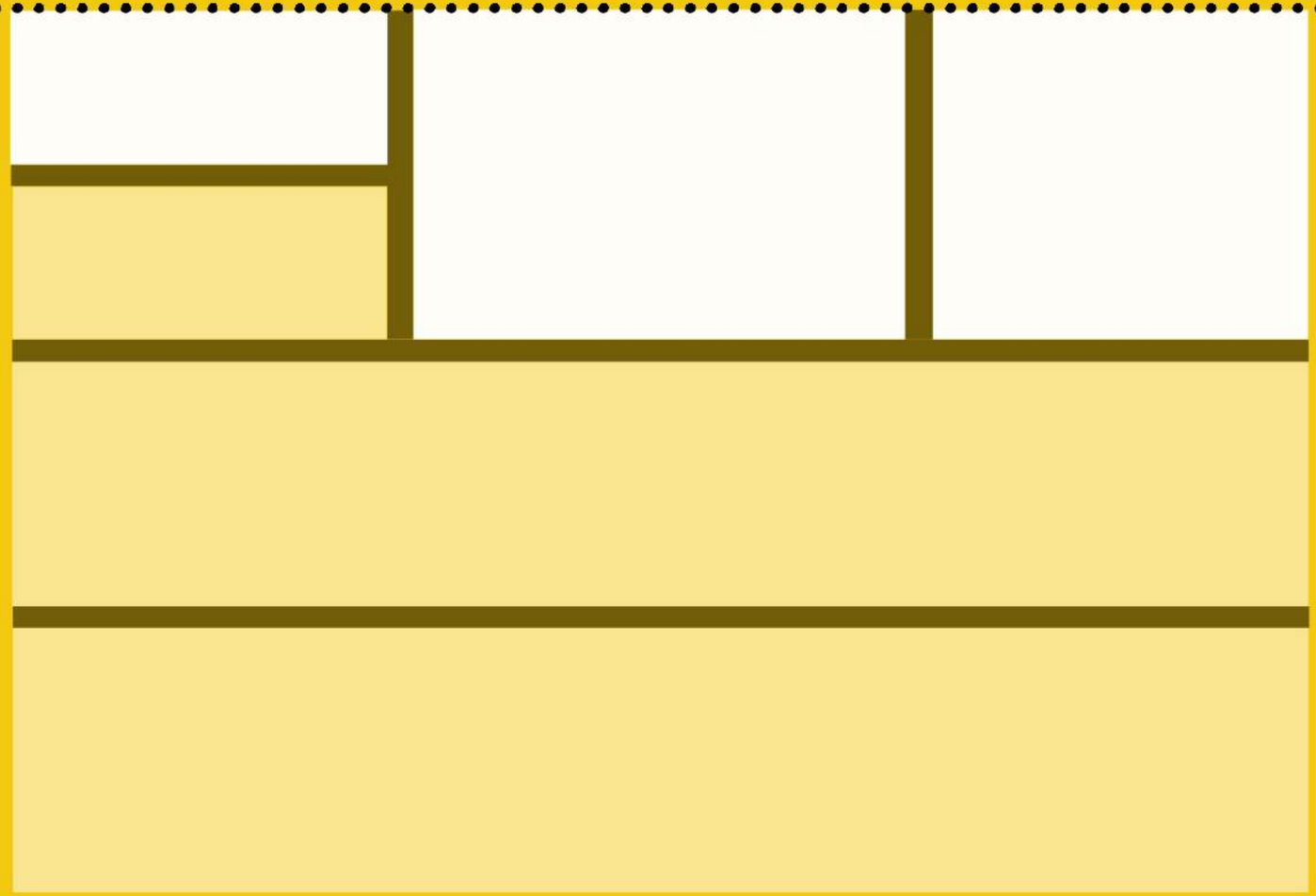
Designing reports and dashboards in Power BI



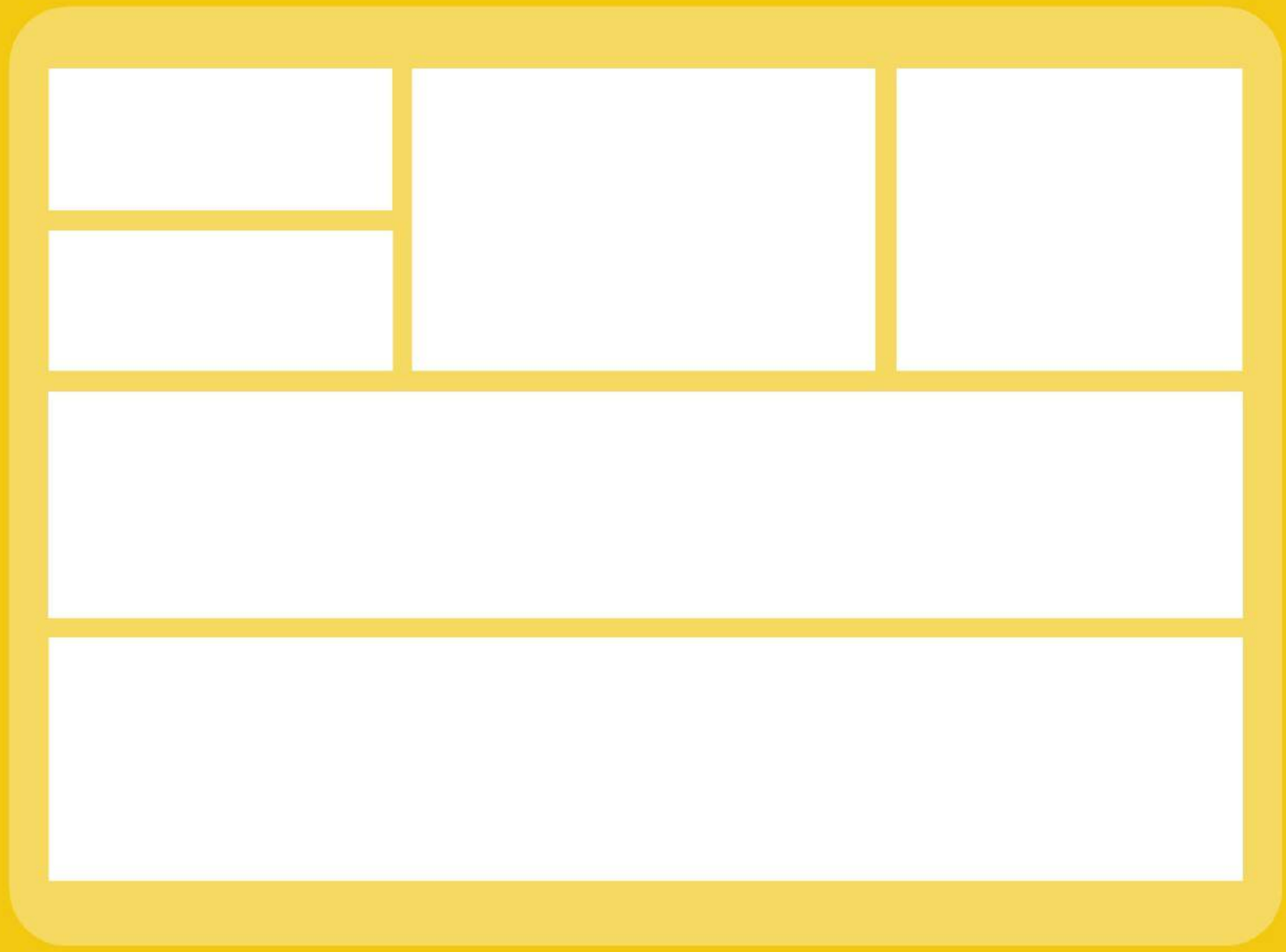
1.
Always use a
Grid



2.
Use a correct Alignment



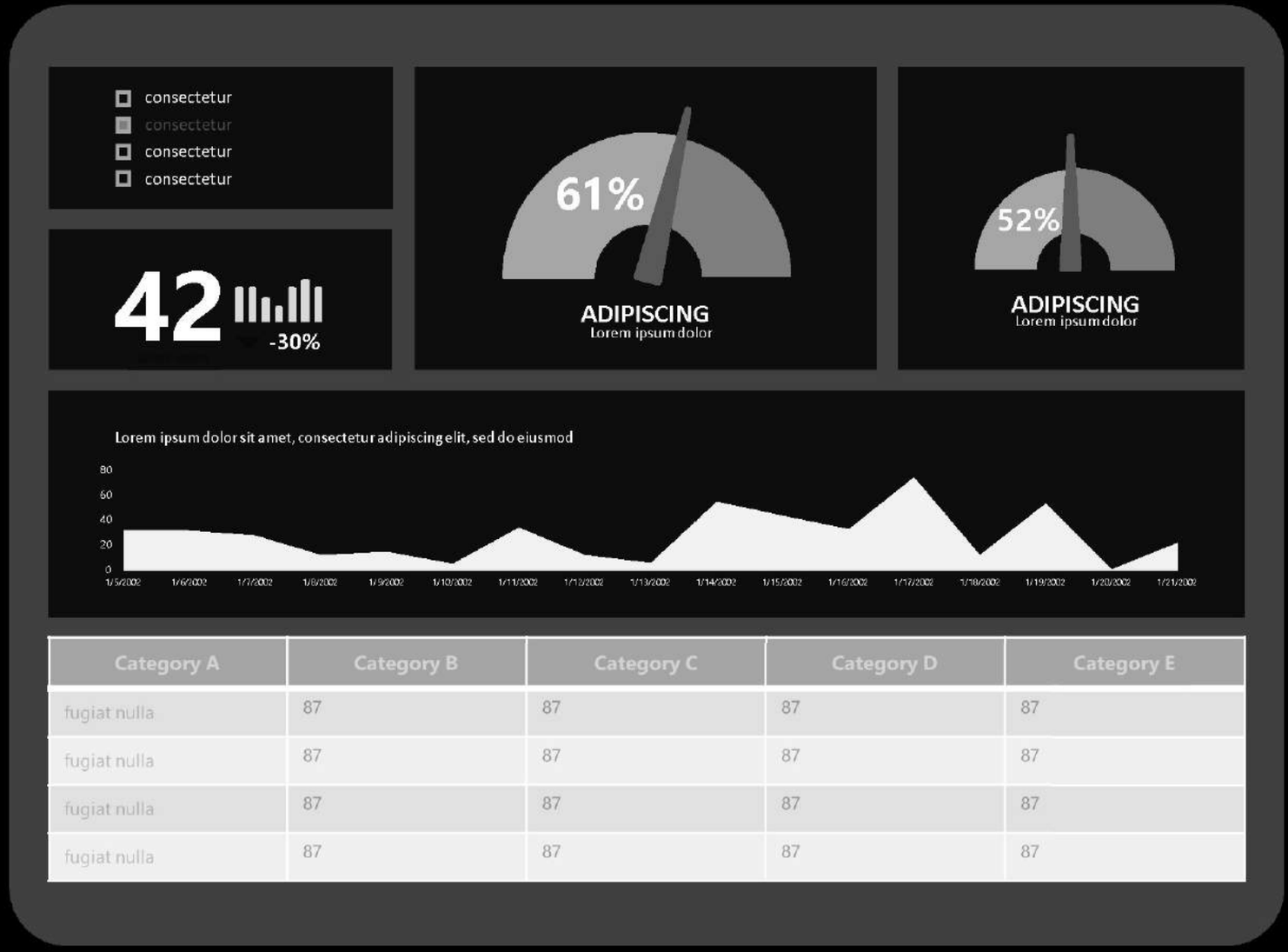
3.
Appropriate Spacing



4.
Select the right Background

Category A	Category B	Category C	Category D	Category E
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87

5.
Simpler
Is better!



Category A	Category B	Category C	Category D	Category E
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87

6.

Use Negative Space wisely

7. Choose your Color palette

ANALOGOUS
Colors

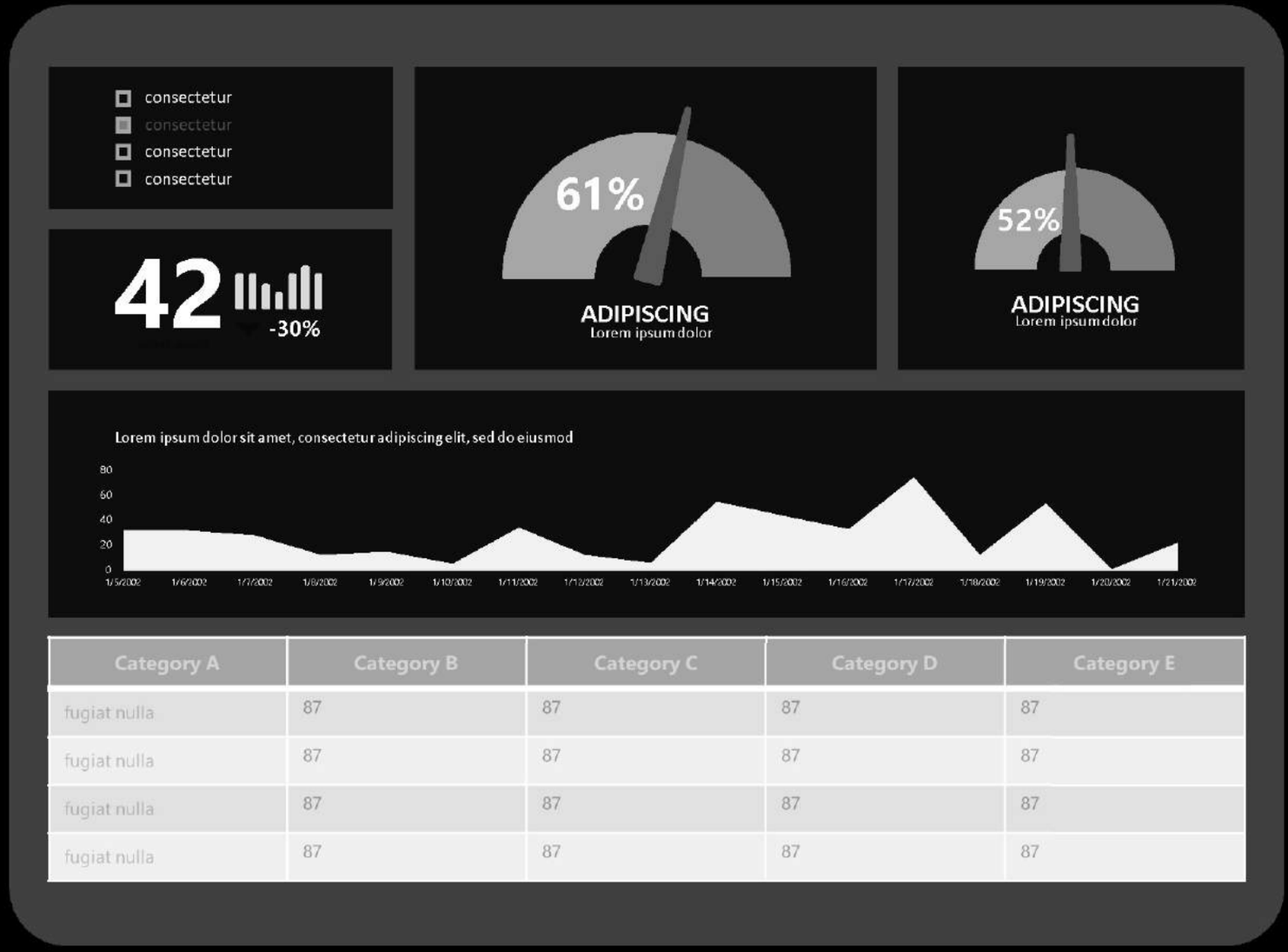
<4

TRIADIC
Color

<4

MONOCHROMATIC
Color

<6



Category A	Category B	Category C	Category D	Category E
fugiat nulla	87	87	87	87
fugiat nulla	87	87	87	87
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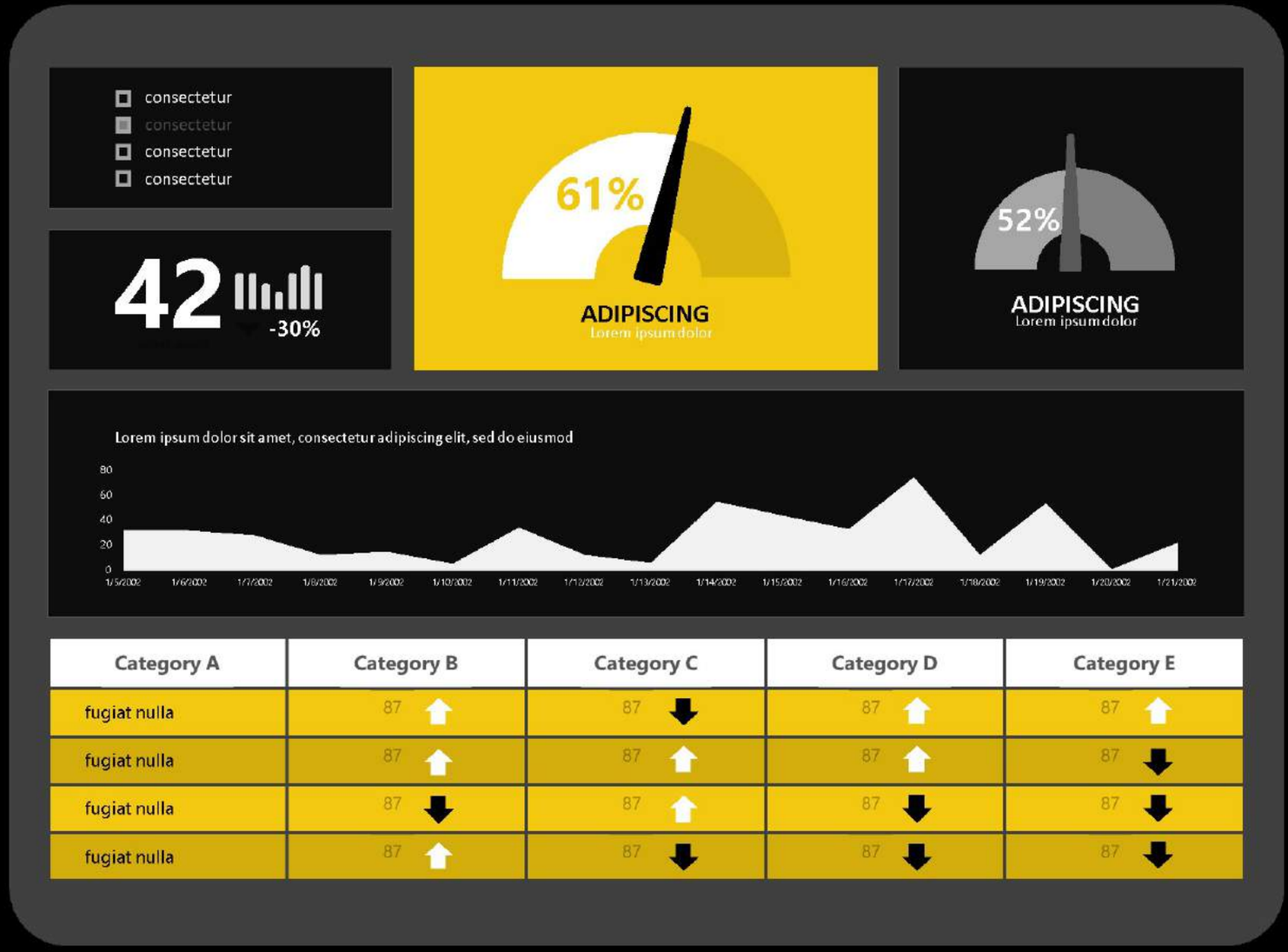
fugiat nulla	87	87	87	87

8.

Enhance

the important parts of a page



Category A	Category B	Category C	Category D	Category E
fugiat nulla	87 ↑	87 ↓	87 ↑	87 ↑
fugiat nulla	87 ↑	87 ↑	87 ↑	87 ↓
fugiat nulla	87 ↓	87 ↑	87 ↓	87 ↓
fugiat nulla	87 ↑	87 ↓	87 ↓	87 ↓

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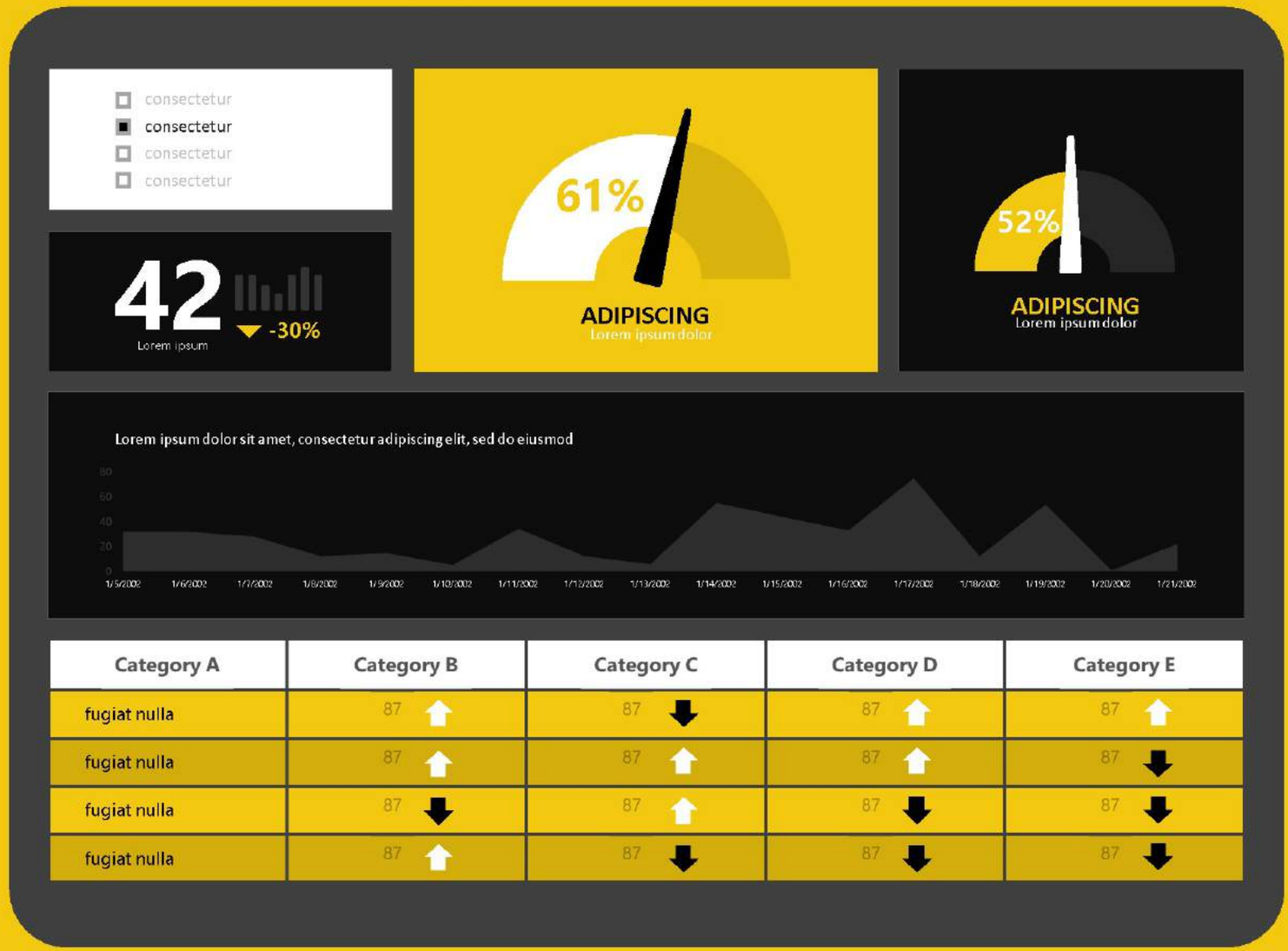

Category A	Category B	Category C	Category D	Category E
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fugiat nulla	87 ↓	87 ↑	87 ↓	87 ↓
fugiat nulla	87 ↑	87 ↓	87 ↓	87 ↓

Success!!!

Thanks!

Slides

By Miguel Myers

Questions? @HavensBI

Knowledge Check

Design Principles

How do we **process information?**

Left to Right

Top to Bottom

What does **S.C.R.A.P** stand for?

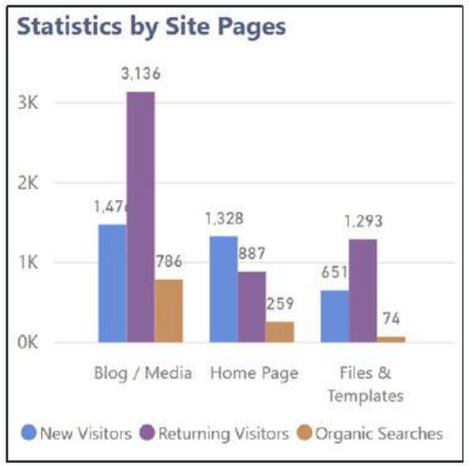
- Spacing
- Contrast
- Repetition
- Alignment
- Proximity

Knowledge Check

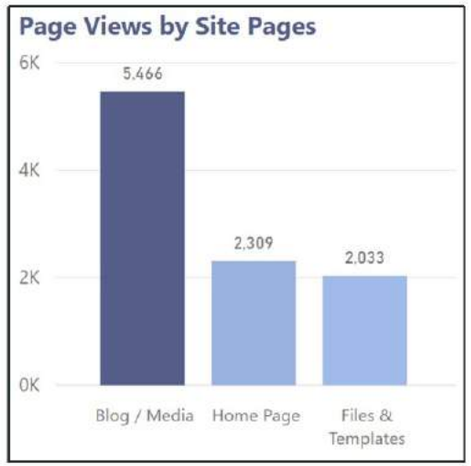
S.C.R.A.P Methodology

What are the **three types** of **color contrast** that can be used to distinguish elements?

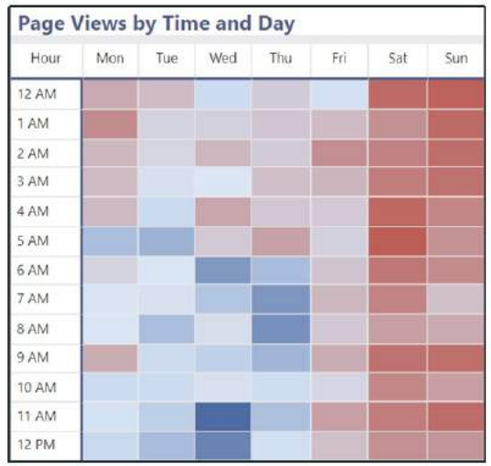
Categorical



Sequential



Diverging

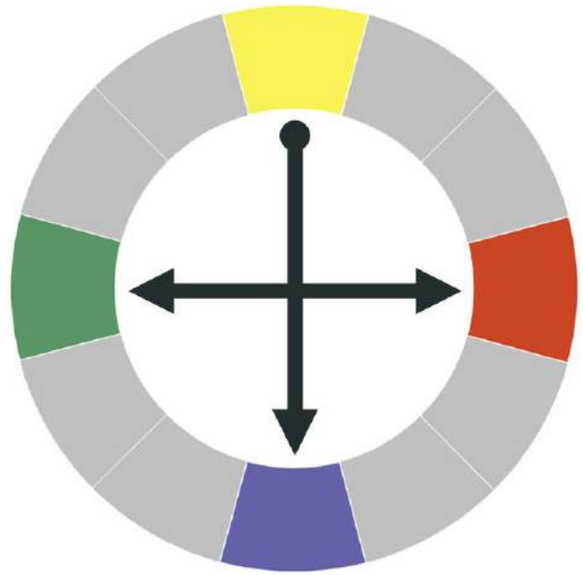


Knowledge Check

Design Principles

What type of **color harmony** is implemented in this report?

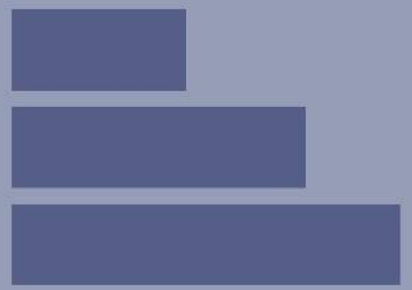
Tetratic



Knowledge Check

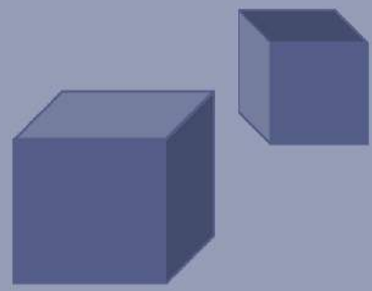
Visual Cues

Easiest visual cue to process?



Length (Aligned)

Hardest visual cue to process?



Volume

What influences **accuracy?**

Alignment

What influences **accuracy?**

Direction

Demonstration

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Applying Report Design Principles

- Exercise 1 – Background Color
- Exercise 2 – Alignment and Spacing
- Exercise 3 – Removing Object Elements
- Exercise 4 – Selecting Visual Types

Recommended Practices

- **Design principle practices:**
  - Commonly, people look at the *upper-left of report* pages first – consider carefully what to place there as that is the first thing users will see
  - Develop reports from a *blank canvas perspective* – start with nothing and add one element at a time until requirements are met
    - This will help minimize unnecessary elements and prevent the report from becoming "noisy"
  - Consider using a *light page background* and *white backgrounds for objects* – this creates soft borders between page elements
  - Choose carefully the type of color contrast *(categorical, sequential, diverging)* applied to visuals – as each one tells a different story with the data
  - Repetition *(e.g. font, color, location, naming, etc.)* can be used to indicate relationships or *lack thereof* – so choose carefully when to apply

Recommended Practices

- **Design principle practices:**
  - Apply alignment to *every object* – no exceptions
    - Borders between objects should be able to follow a *natural line* throughout the report page
    - Enable *gridlines* and *snap-to-grid* on the view tab to assist with alignment and spacing
  - Have feedback sessions with users to determine *logical proximity* of report objects and the "flow" of the report page
  - Reports should be built to *minimize eye and mouse travel* on the screen

Recommended Practices

- **Data visualization practices:**
  - Have feedback sessions with users to determine what type of story needs to be told for each visualization – and make a visual type selection based on this
    - E.g. Part-to-whole, correlation, distribution, etc.
  - *Forced variation* between visual types does not always add value – choose carefully the type of visual if *data accuracy* is important

References

- Power BI Visualization Best Practices
  - https://docs.microsoft.com/en-us/power-bi/visuals/power-bi-visualization-best-practices
- Design Concepts for Better Power BI Reports
  - https://datasavvy.me/design-concepts-for-better-power-bi-reports
- Adobe Color Wheel
  - https://color.adobe.com
- Color Blindness Resources
  - https://www.color-blindness.com/
- Visuals Reference
  - https://www.sqlbi.com/ref/power-bi-visuals-reference

Questions?

Online Resources

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- **Presentation PDF**
  - http://www.havensconsulting.net/speaking-events
- **Consulting Services**
  - http://www.havensconsulting.net/consulting-services
- **Files & Templates**
  - http://www.havensconsulting.net/files-and-templates
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