

How to Choose a Visual Chart

Rules of Thumb

What is the single most important thing I want them to see when they open the chart?

Orientation

We start by orientation, which is very simple. If you are presenting time (days, months, quarters, years), use a chart with a horizontal axis that runs left to right. If you are not showing time, use charts with a vertical axis, going from top to bottom. This means products, business units, cost types and so on.

Lines vs. bars

Bars for fewer values, lines for more. As we mentioned when covering the time series, you should use lines or areas to indicate trends where you are working with more data elements. If you have just a few columns, then you can use.

Report Design Decisions

Shapes

Choose certain shapes for certain purposes. Be consistent in the use of shapes. For example, you can always use bars for revenue and lollipop charts with dots for percentages. This will allow users to quickly identify what data they are looking at.

Patterns

Similarly, you can use patterns to code data scenarios like Actual, Budget, Forecast and Previous Year.

Taxonomy of Business Charts by Task, Orientation & Shape

	Time series Charts with horizontal axis				Structure Charts with vertical axis				Multiple charts	
Comparison Trend analysis or Breakdown and ranking									Small multiples	
Part-to-whole Compare part to total or analyze accumulation										
Contribution Contribution of parts to total or calculation analysis										
Opposition Compare opposing series <i>(avoid these charts)</i>										
Series comparison Compare 2 or more data series									Combo charts	
Variance Analyze deviation/variance to plan, PY, forecast, benchmark.										
Integrated variance Compare variance to base value (gap analysis)									Extended charts	
Contribution of variance Contribution of variances to total change										
Portfolio & Correlation Analyze correlation Analyze a portfolio										
	Column	Line	Area	Dot	Bar	Dot	Circle	Pie		

Source

<https://zebrabi.com/how-to-choose-the-right-chart-power-bi/>