

Power BI Reporting Recommended Formatting

Reporting & Insights Team

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Document Purpose and Usage

Document Purpose

- Serve as a recommendation for report object formatting to ensure standardization of all reports from the R&I team
- Document approved object formatting specifications
- Document best practices for report model and object labeling to aid in future maintenance or report handoff
- This document is intended to be used as a baseline for report development and in no way is intended to limit report design customization
- All screenshots used in this document contain obfuscated data so although the metrics may be from a production report the numbers are not real

Document Usage/Notation

Object/Notation	Description
P/S: (100/100/100/100)	This refers to a recommended X-Position, Y-Position, Width, and Height. If an N is used in place of a number it indicates that, that attribute will vary based on the object
Font: Segoe / 20 / BI / Left / FFFFFFFF	This refers to the font formatting for the following attributes (in this order, if an attributes is not available or is none it is left blank) <ul style="list-style-type: none">• Font• Size• B=Bold, I=Italic, U=Underline• Justification (left, right, center)• Color in HEX
___Color: 999999 / 10	Color of background, fill, outline, etc. <ul style="list-style-type: none">• Color in HEX• Transparency in %
___Grid: On / 999999 / 1	Refers to grid formatting <ul style="list-style-type: none">• On or off• Color in HEX• Grid thickness
* Items not listed	Be default if an attribute is not listed it is either turned off, null, or default value



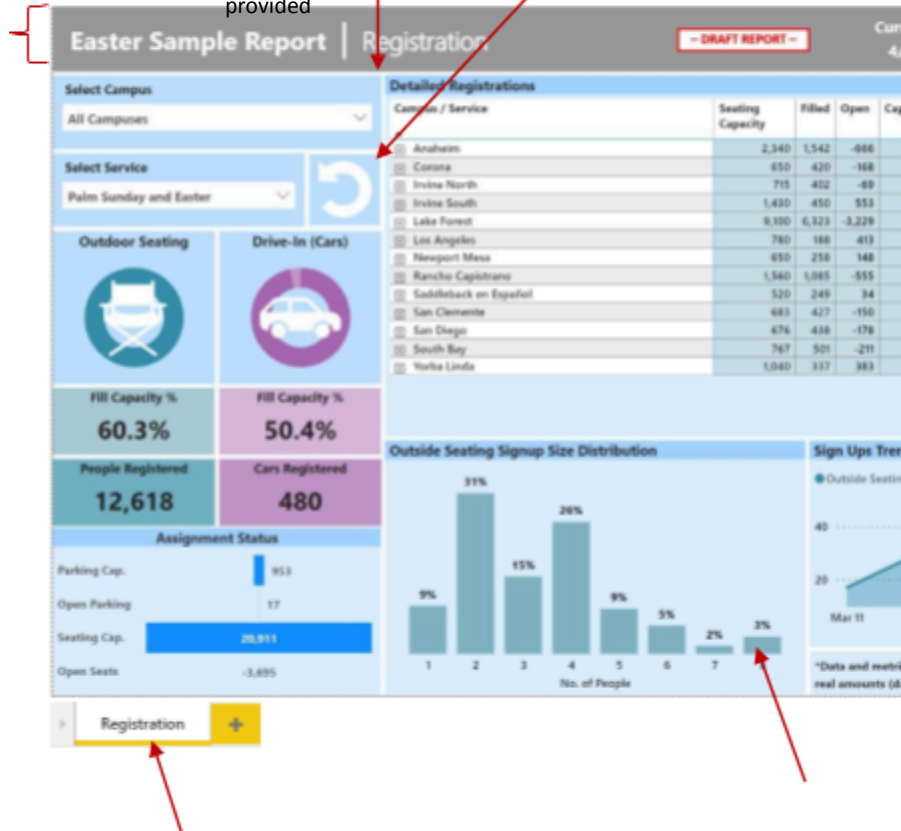
Report Page Overview / Layout

Header section should be standardized for all reports

White space between blocks
~4-6 pixels

Each item resides in a block
(background color) distinguishes block

If a slicer is being used a reset button should be provided



Report Page Name

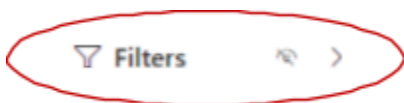
- This is the main navigation item for report viewers
- Use simple and clear names (should match title in most cases)

Tooltips

- Regardless of whether tooltips are on or off all charts and tables should have user friendly names
- In some cases tooltips will display even if off

Filters

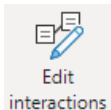
- If filters are not going to be available to users then disable the view
- If they are then ensure each has a user friendly name and matches what is displayed on the



report page



Report Options and Settings

Setting Item	Selection
Report Page: Click Page > Format Tab > Canvas Settings > Type	Type = 16:9
Options: Current File > Data Load > Relationships	<ul style="list-style-type: none">• Import Relationship from data sources on first load = Off• Autodetect new relationships after data is loaded = Off
Options: Current File > Data Load > Background Data	<ul style="list-style-type: none">*Only if the report is taking excessive resources• Allow data previews to download in the background = Off
Options: Current File > Data Load > Q&A	<ul style="list-style-type: none">• Turn on Q&A to ask natural language questions about your data = Off
Options: Current File > Report Settings > Persistent Filters	<ul style="list-style-type: none">• Don't allow end user to save filters on this file in the power BI service = On
Options: Current File > Report Settings > Visual Options	<ul style="list-style-type: none">• Hide the visual header in reading view = On• Use the modern visual header with updated styling options = On
Options: Current File > Report Settings > Export Data	<ul style="list-style-type: none">• Don't allow end users to export any data from the service or Report Server = On
Options: Current File > Report Settings > Filtering Experience	<ul style="list-style-type: none">• Allow users to change filter types = Off• Enable search for the filter pane = Off
Click on report page object Format (in ribbon) > Edit Interactions 	<ul style="list-style-type: none">• Check all report item interactions before publishing. If the interaction does not make sense or help in understanding the data then default to turning off.



Report Page Header

Item: Report Title | Page Title

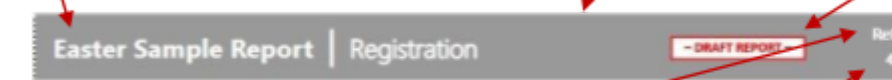
Object: text
text
box
P/S: 13/0 /785 /74
Font(Report Title): Segoe UI / 20 / B / Left / FFFFFFFF
Font(Page Title): Segoe UI Light / 20 / B / Left / FFFFFFFF

Item: Header Background Block

Object: shape P/S: 0/0/1000/68

Item: Draft Report Icon

Background Color: 999999 / 0



Item: Refresh Date Title

Object: textbox
P/S: 830/5/160/42
Font: Segoe (Bold) / 12 / Center / FFFFFFFF

Item: Refresh Date

Object: card

P/S: 835/27/150/42
Font: Segoe UI Bold / 12 / FFFFFFFF

Item: HC Icon

Object: image
P/S: 1004/0/206/68
Action: Web URL
URL: <https://hc.saddleback.com>

Item: Report Notes Button

Object: image
P/S: 1210/0/70/72
Scaling: Fill Action: Bookmark



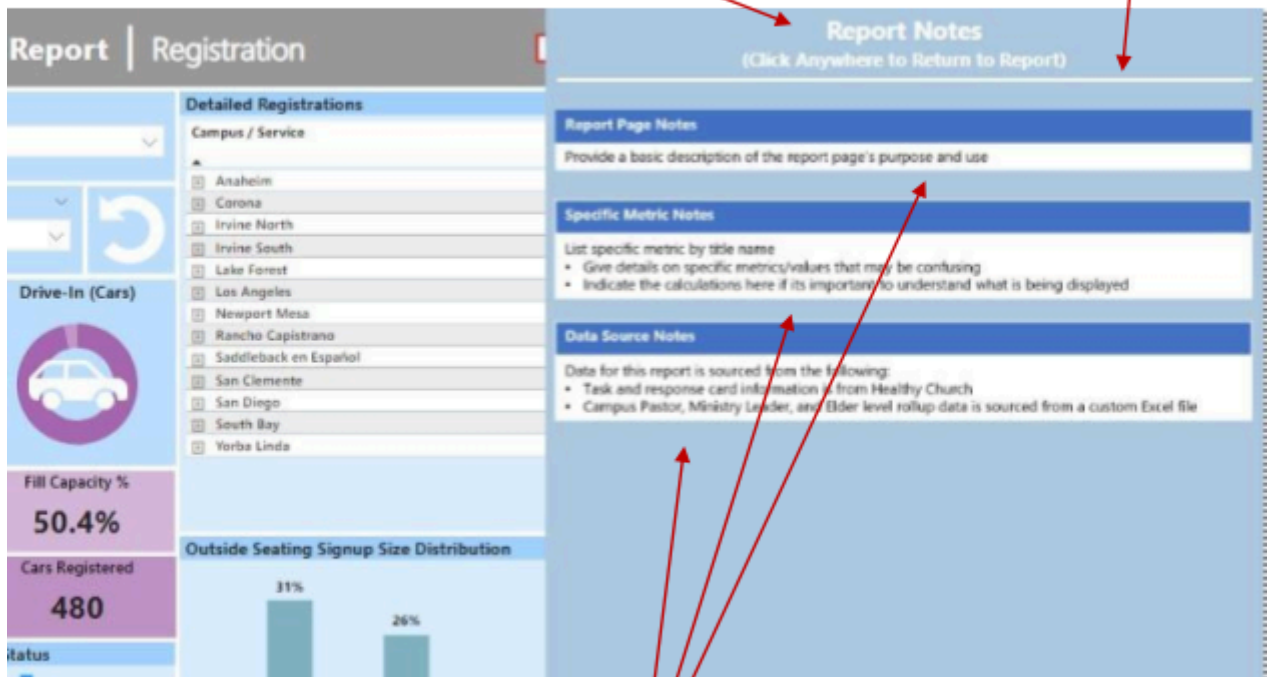
Report Page Notes

Item: Notes Title / Notes to User

Object: text box
P/S: 667/0/60
8/61
Font(Notes Title): Segoe (Bold) / 16 / / Center / FFFFFFFF
Font(Notes to User): Segoe (Bold) / 12 / / Center / FFFFFFFF

Item: Break Line

Object: line
P/S: 662/50/618/23
Line Color: FFFFFFFF / 0
Line Width: 3



Item: Clear Button Overlay to Exit Notes

Object: shape
P/S: 0/0/1280/720
Action: Bookmark

Item: Notes Text

Object: text box
P/S (First): 668/78/606/N
P/S (Subsequent): 668/N/606/N
Title Font: Segoe UI Bold / 10 / / FFFFFFFF
Text Font: Segoe UI / 9 / / 333333
Title Background Color: 4472C4

Border Color: FFFFFFFF

Item: Notes Background

Object: shape

P/S: 662/0/618/720

Background Color: ADC8E1 / 0



Report Page Tables and Matrices

- If possible, the table/matrix should be created as one object and formatted with the following attributes
- Overlaying multiple items should be avoided in order to simplify creating the report page mobile view

Item: Title

Object: matrix title

Font: Segoe UI Bold / 11 // Left / 1A1A1A

Background Color: A0D1FF / 0

Item: Row Headers

Object: matrix row headers

Font: Segoe UI Semibold / 9 // Auto /

1A1A1A Word Wrap: On

Outline: Right Only

Stepped Layout: On /

10

+/- Icons: On / 9

Item: Column Headers

Object: matrix column headers

Font: Segoe UI Bold / 9 // Auto / 1A1A1A

Word Wrap: On

Detailed Registrations

Campus / Service	Seating Capacity	Filled	Open	Capacity %	Avg Size	Drive-In Capacity	Filled	Open	Capacity %
15 Anaheim	2,340	1,542	-666	65.9%	3.0				
15 Corona	650	420	-168	64.5%	2.8				
15 Irvine North	715	402	-69	56.3%	2.7				
15 Irvine South	1,430	450	553	31.4%	2.8	113	39	37	34.4%
15 Lake Forest	9,100	6,323	-3,229	69.5%	3.4	840	441	-20	52.5%
15 Los Angeles	780	188	413	24.2%	2.3				
15 Newport Mesa	650	258	148	39.6%	2.4				
15 Rancho Capistrano	1,560	1,085	-555	69.5%	3.1				
15 Saddleback en Español	520	249	34	48.0%	2.9				
15 San Clemente	683	427	-150	62.5%	2.9				
15 San Diego	676	438	-178	64.8%	2.2				
15 South Bay	767	501	-211	65.4%	2.6				
15 Yorba Linda	5040	337	383	32.4%	2.3				

Item: Background

Object: matrix background Color:

A0D1FF / 60

Item: Values

Object: matrix values

Font: Segoe UI Semibold / 9 // Auto /

1A1A1A Banded Row Style: On

URL Icon:

On Word

Wrap: On

Item: Grid

Object: matrix grid

Vertical Grid: On / 999999 / 1

Horizontal Grid: On / 999999 /

1 Row Padding: 1

Outline Color: 118DFF / 1



Report Page Objects and Cards

Item: Slicer

Object: slicer

Header Font: Segoe UI Bold / 10 / / /

1A1A1A Items Font: Segoe UI Bold /

10 / / / 666666 Items Background:

FFFFFF

Background: A0D1FF / 30

Item: Chart Header / without Labels

Object: donut chart

Title: Segoe UI Bold / 11 / / Center /

1A1A1A Title Word Wrap: On

Background: A0D1FF / 30

Item: Icon Overlay

Object: image

Maintain Layer Order: On

Item: Card

Object: card

Data Label: Segoe UI Bold / 20 / / / 1A1A1A Word

Wrap: On

Title: Segoe UI Bold / 10 / / Center / 1A1A1A Title

Word Wrap: On

*Standard Background: A0D1FF / 30

Item: Reset Button

Object: button

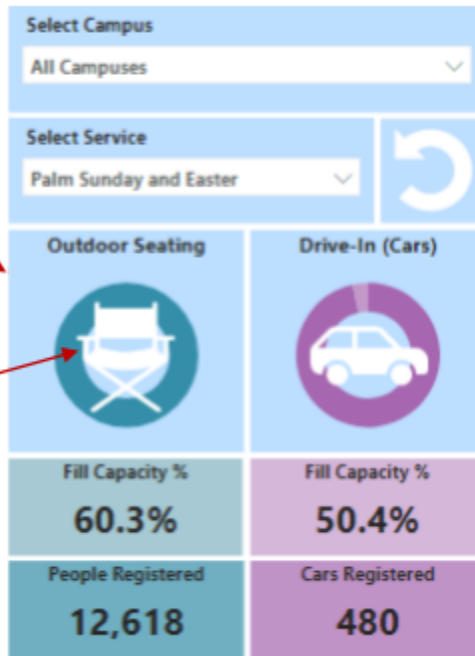
Image Scaling: Normal

*This image is available in the sample

Power BI report

*Color is set to match slicer background

color



Item: Notes

Object: textbox

Text: Segoe (Bold) / 9 / / Left / 1A1A1A

Background: A0D1FF / 60

*Data and metrics on this report are for sample purposes only and do not reflect real amounts (data has been manually obfuscated)



Report Page Charts and Visuals

Item: Title

Object: _title

Font: Segoe UI Bold / 11 // Left / 1A1A1A

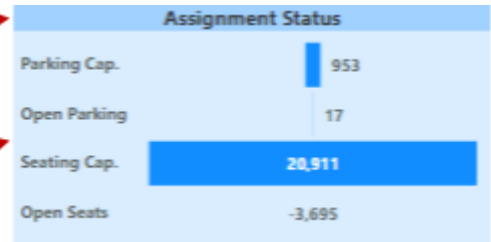
Background Color: A0D1FF / 0

Item: Horizontal / Categorical Item

Object: category

Category: Segoe UI Bold / 9 // 333333

Maintain Layer Order: On



Item: Axis Items

Object: ____chart axis

_Axis: Segoe UI Semibold / 9 // 333333

_Axis Title: Segoe UI Semibold / 9 // 333333



Item: Data Labels

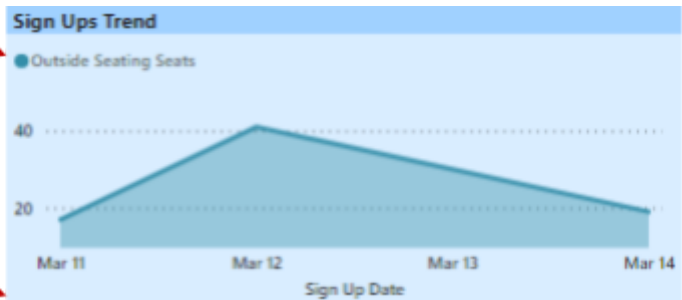
Object: data labels

Data labels: Segoe UI Bold / 9 // default

Item: Chart Legend

Object: legend

Data labels: Segoe UI Semibold / 9 // 333333



Item: Chart Background

Object: background

Color: A0D1FF / 60

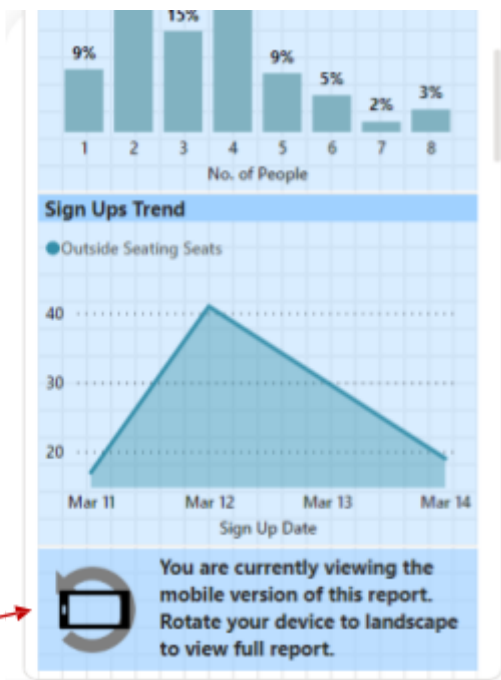
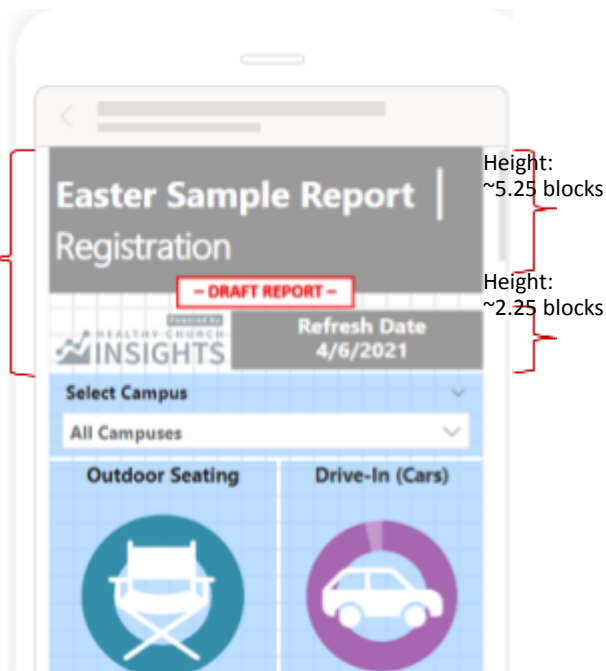


Report Page Mobile View

Mobile View Order:

- Report Header
- Draft Report Icon
- HC Icon & Refresh Date
- Slicers
- Report Objects (Charts, Tables, ect.)
- Mobile Note

* The header portion should look the same for all reports



* Mobile note objects are hidden on the report page behind a white shape

* These objects are available in the sample Power BI Report



Model Standards: Power Query

Query Organization and Naming Conventions

Group like queries together

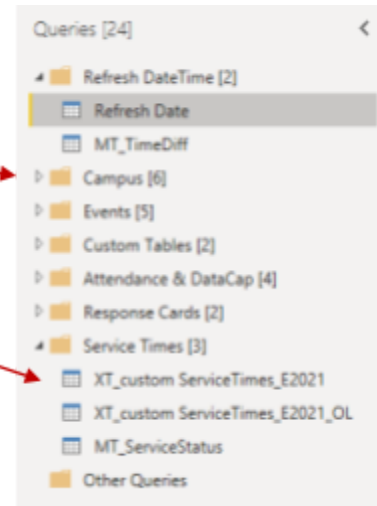
- Reduce nesting as much as possible, usually 1 level is sufficient

Table Naming Convention for non-Dataflow data

- MT = Manual table (table created by clicking Enter Data)
- XT = Excel based table

Table Naming Convention for Dataflow data

- Keep base/default query name if possible and use _ or () to include additional descriptors to name



Disable Load / Delete Tables Where Possible

- If a query is not being used, remove it from the model to reduce file size and complexity
- If a query is only used to calculate another query and does not need to be referenced when building the report then Disable Load

Query Design and Notes

Shared DimCampus

```
let
    Source = PowerBI.Dataflows(null),
    #"bf01647e-5d6d-4d1d-8368-9c345c132177" = Source[workspaceId="bf01647e-5d6d-4d1d-8368-9c345c132177"],
    #"9e930455-b6ce-489c-9e9f-5a2a8398671d" = #"bf01647e-5d6d-4d1d-8368-9c345c132177",
    #"Shared DimCampus1" = #"9e930455-b6ce-489c-9e9f-5a2a8398671d"[[entity=
//Kept only necessary columns
#"Removed Other Columns" = Table.SelectColumns("#Shared DimCampus1",{"C
//Renamed id columns for easy reference
#"Renamed Columns" = Table.RenameColumns("#Removed Other Columns",{"Ca
//Inner join with public church entity to filter to only relevant campuses
#"Merged Queries" = Table.NestedJoin("#Renamed Columns", {"HC_CampusId"
#"Removed Columns" = Table.RemoveColumns("#Merged Queries",{"public chu
//Added references for the 90,91 online only campus to tables calculate prop
#"Appended Query" = Table.Combine({"#"Removed Columns", #"HT_Shared DimC
in
#"Appended Query"
```

- Label each step or like set of steps with instructions on what the step is doing
- This should be done for all queries to assist in future maintenance

- In addition if the table is either fully calculated or its use is not clear adding a description and usage note before the let statement is recommended
- Precede each note with // to set as a note



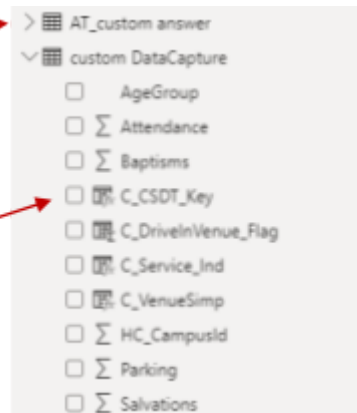
Model Standards: Report Model (DAX)

Table Naming Convention

- AT = calculated table
- M = table containing measures only (see Measure naming convention)

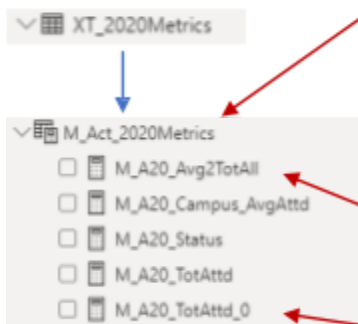
Column Naming

- C = calculated column



Measure Table

- Measure tables start with M
- Second part of name identifies measures to be housed as well as references name of source data table
- Measure tables should only contain measures



Measures

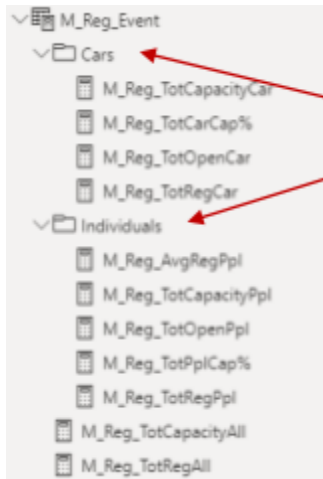
- Measure names start with M
- Second part of name references measure table name
- Third part of name references actual measure
- If a measure is just referencing another measure and adding 0 to prevent null then use same name and notate with 0



Model Standards: Report Model (DAX) cont.

Optional Display Folder Assignment (for all tables)

- Allows for even further categorization of table objects
- Usually applied towards the end of the report build process in order to enable more efficient future work on the report




Display Folder

- To assign name go to model view, Properties > General > Display Folder
- Enter folder name here
- To remove from folder, enter space " " in folder name

Calculated Columns/Measures/Tables Notes

- Describe column or measure
- If using complex logic notate steps as well



```
1 M_Reg_TotRegPpl =  
2 //Toatl number of individuals registered to sit outside  
3 CALCULATE( SUM( 'event event'[C_TotalReg_Amt] ) ,  
4 FILTER( 'event event' , 'event event'[C_EventType4Cnt_Ind] = "OS" ) )
```