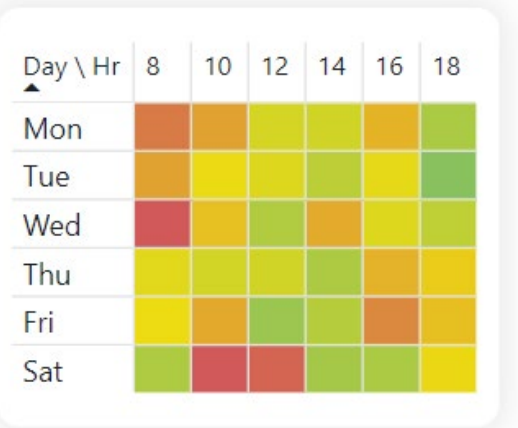
POWER BI TIP

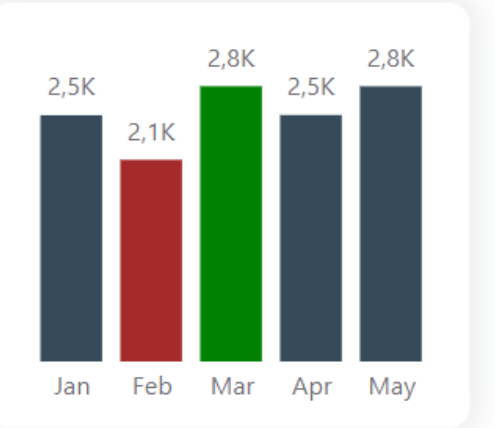
Conditional formatting:

Enhancing analysis with color

Show trends



Identify patterns



Highlight peaks

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Show trends

Colors are a quick way to show if key performance indicators (KPIs) are moving in the right direction.

For instance, green could mean an amount is up from last year, while red might indicate a drop. This immediate visual cue helps identify trends before even digging through numbers.

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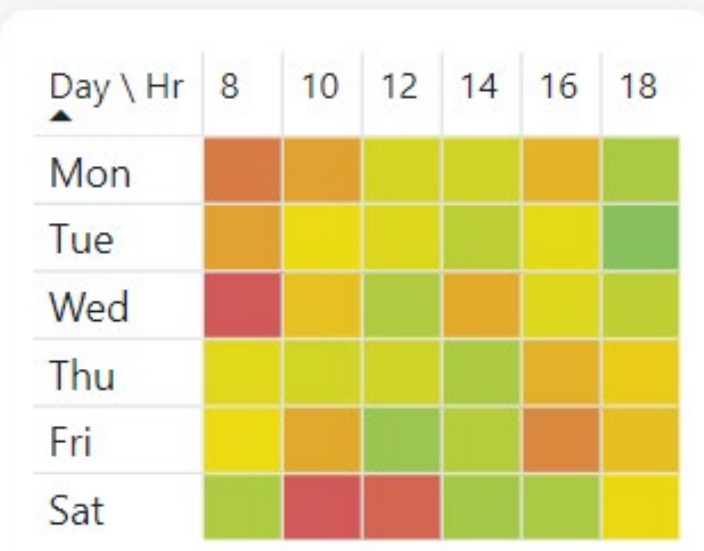
Identify patterns

Using color-coding to map data unveils critical patterns, making it straightforward to interpret complex datasets.

For example, in a call center scenario, applying a color gradient can highlight variations in average waiting time throughout the day and week. This offers a clear, visual indication of when the call center is experiencing its busiest periods.

Day \ Hr	8	10	12	14	16	18
Mon	40	39	36	36	38	35
Tue	39	37	37	35	37	33
Wed	41	38	35	39	37	36
Thu	37	36	36	35	39	38
Fri	37	39	34	35	40	38
Sat	35	41	41	34	35	37



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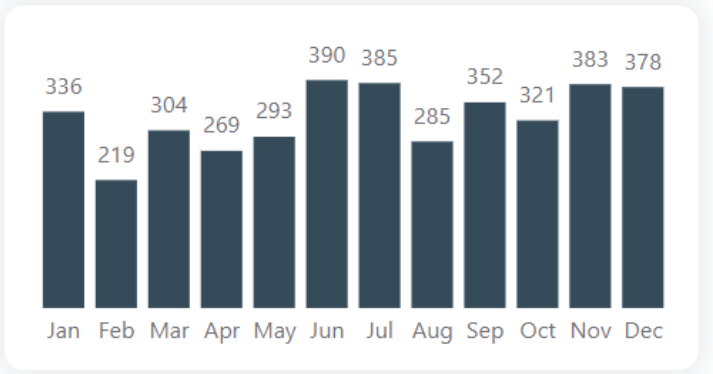
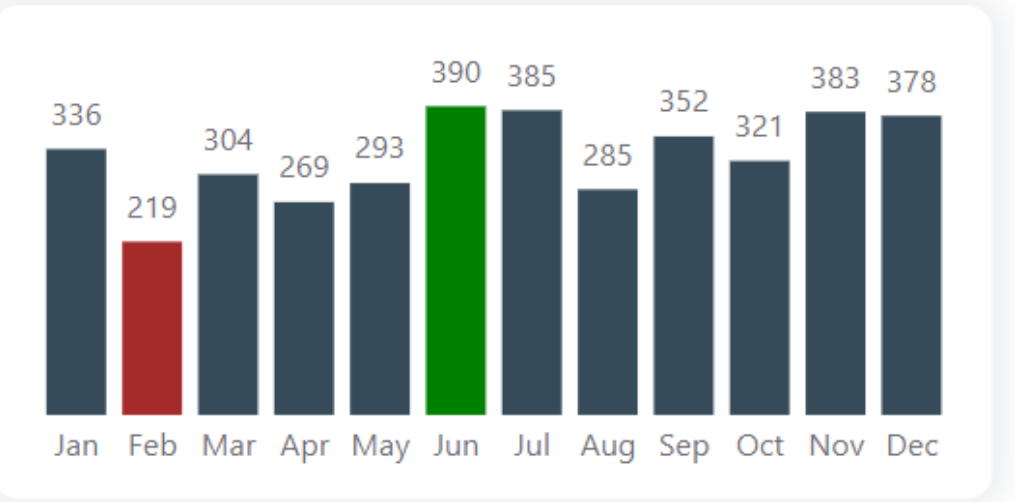
Highlight peaks

Setting colors makes identifying peaks or outliers in data straightforward, serving as a visual aid to underscore important information.

For instance, within a sales dataset, this practice can immediately highlight the highest and lowest sales months, sharpening the focus for analysis and strategic planning.





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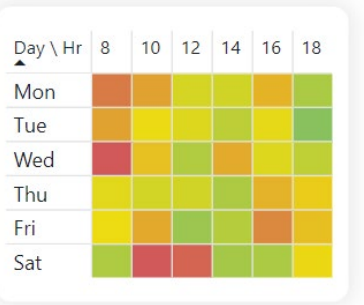
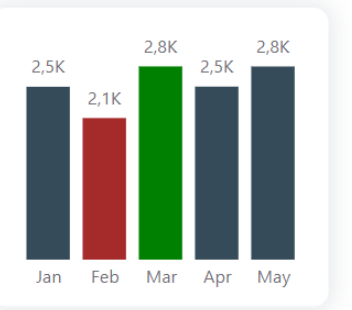
These 3 use-cases can be easily implemented by using the “Conditional formatting” feature

Rules



Gradient



Field value

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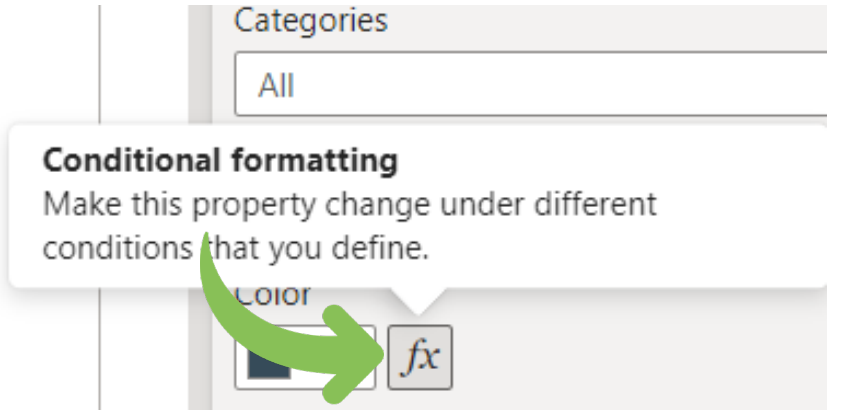
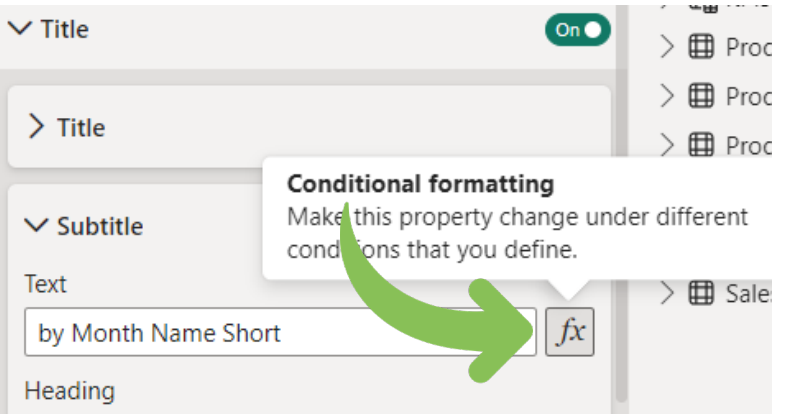
What is “Conditional formatting” ?

Conditional formatting in Power BI is a powerful feature that can dynamically apply a formatting option to visual elements, significantly enhancing data comprehension.

This feature is easily identifiable by the « ***fx*** » symbol next to various formatting options.

While widely recognized for its ability to color data dynamically, its capabilities extend further, allowing for example, the customization of titles or subtitles based on dynamic logic.





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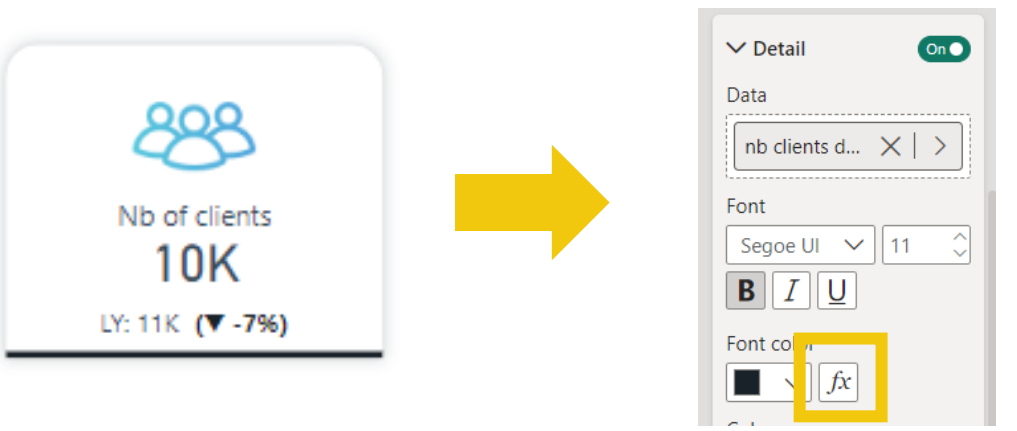
How to? “Rules”

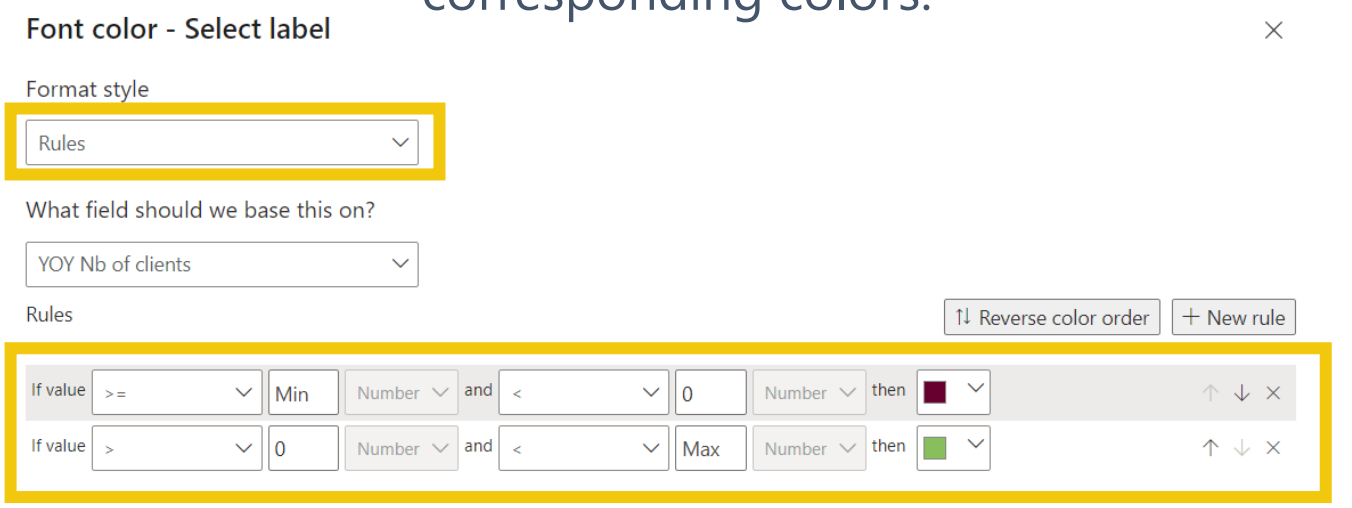
The "rule" option in conditional formatting allows for the application of specific colors based on predefined criteria/rules.

To implement this,

Go to Formatting pane -> identify the option you want to dynamically color (font and/or item color) -> Click on the « fx » icon



Make sure to have the « Rules » option selected.
The newly opened window will allow you to set up different rules and corresponding colors.



In the mentioned example, the (new) Card visual was used as it allows for more customizations, but you can as well use the classic one.

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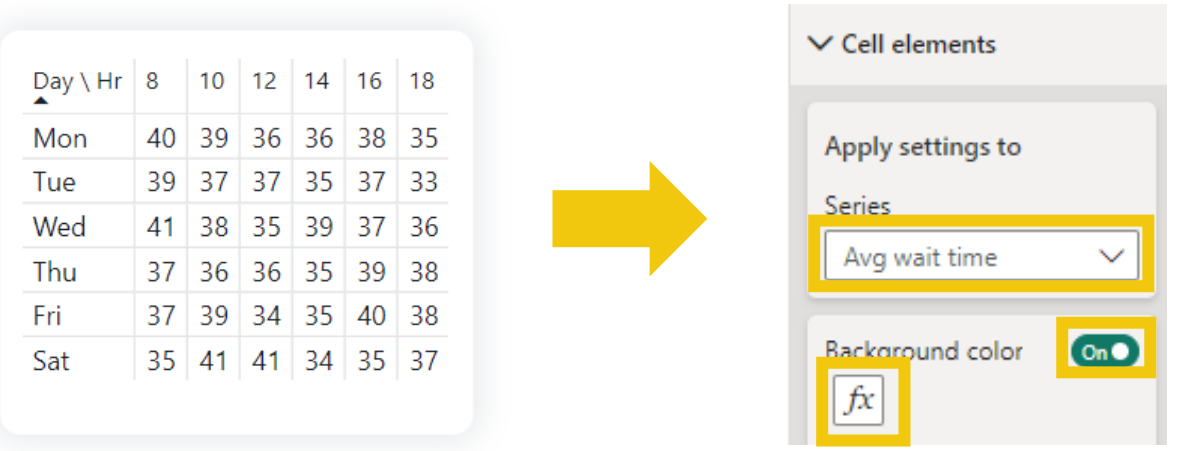
How to? “Gradient”

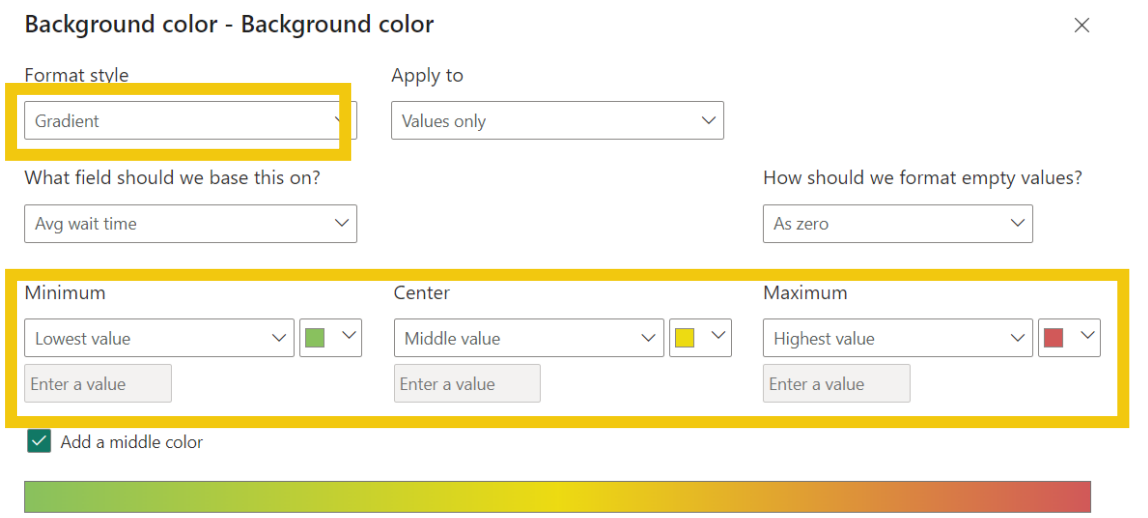
The gradient option visually represents data intensity, seamlessly transitioning through colors to indicate varying levels of performance or activity.

To implement this, you can take a table or a matrix as a base, and then go to:

Formatting pane -> Cell elements -> Apply to a specific Series -> Activate the « Background color » option -> Click on the « fx » icon



Make sure to have the « Gradient » option selected.
The newly opened window will allow you to set up color for you gradient.



You can implement the same rule for the « Font color » option to have only colored cells without « visible » data

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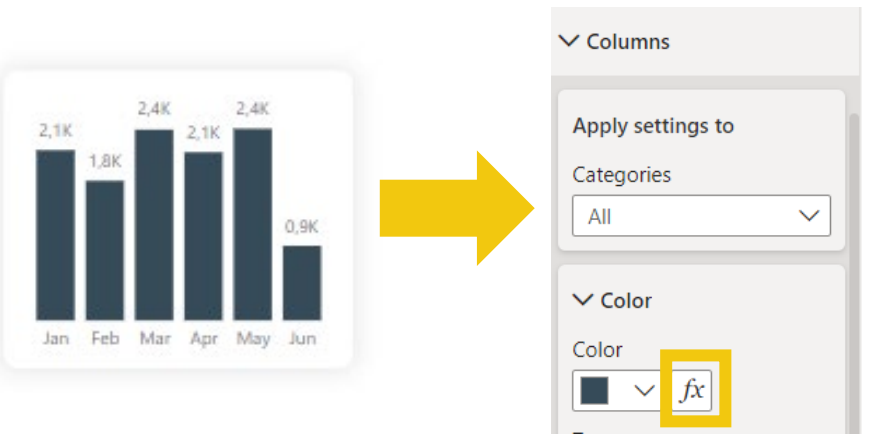
How to? “Field value”

The "field value" option in Power BI's conditional formatting allows users to set colors based on the actual value of a field or a measure.

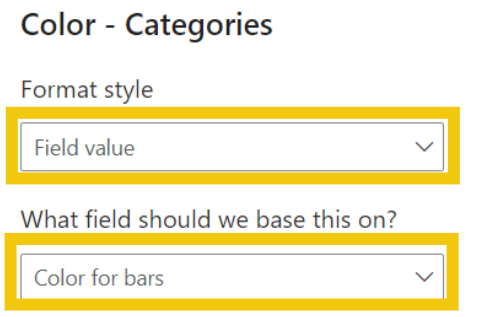
For this, you can for example create a measure that will return a color; then, use this measure to set the dynamic states. Here an excerpt (you can use either color names or code):

```
RETURN
    SWITCH (
        TRUE (),
        [Nb of orders] = MAXIMUM, "Green",
        [Nb of orders] = MINIMUM, "#A52A2A"
    )
```

Next, add a graph, such as a Column chart and go to Formatting pane -> Columns -> Click on the « fx » icon



Make sure to have the “Field value” option selected. Then, you’ll only need to specify the previously created measure.



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What about you?

Are you using this feature in your reports?