



Formatting Visuals in Power BI

Learning Objectives

By the end of this train you should be able to:

1

Format titles

2

Make use of filters

3

Round numbers up/down where appropriate

4

Format chart labels



Overview

The following material will be covered in this train.

Formatting Visuals

- Why and how?
- Titles
- Filters
- Rounding
- Labels

Building a Dashboard

- Dos and Don'ts when building a dashboard



Formatting Visuals

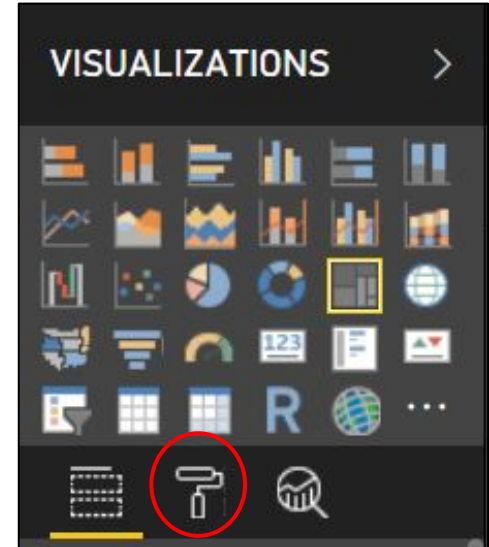
Visuals can be formatted by clicking on the paintbrush icon in the **Visualizations** panel.

With regards to formatting visuals in Power BI, we'll cover formatting:

- Titles
- Filters
- Rounding of numbers
- Labels

There are many other formatting options available in Power BI such as:

- Data colours
- Background
- Borders
- Legends



Dependencies

There are a few dependencies required to complete this train

Requirements to complete this train:

- Power BI desktop installed on your computer for your specific operating system
- The Power BI dashboard containing the IPL dataset



Formatting Visuals - Titles

Power BI uses the **default name of the columns/measures** as the visual title.

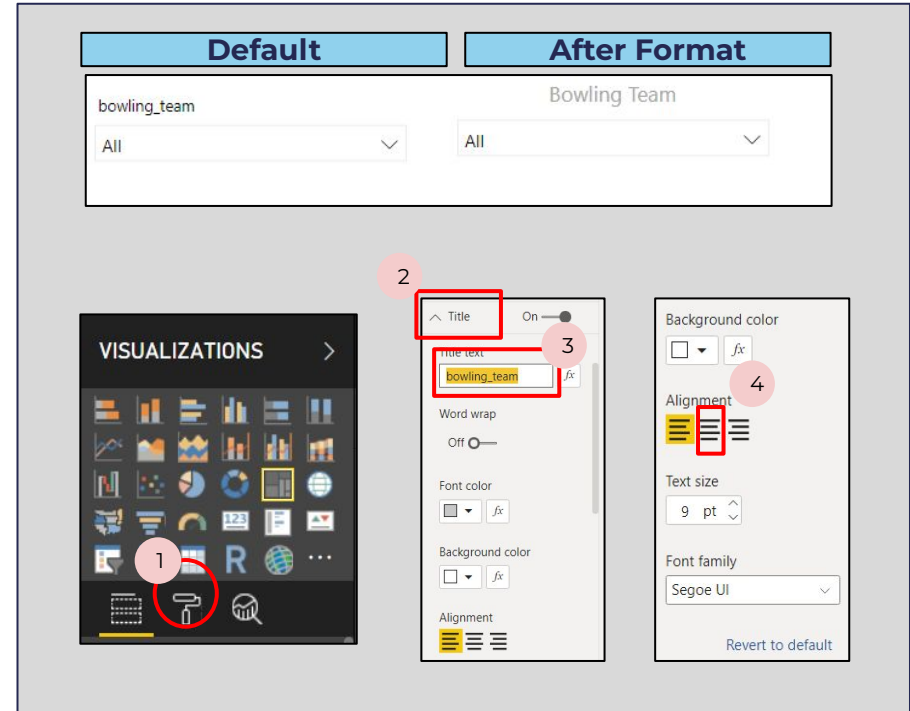
The font size and position of the heading might need to be customised. We, therefore, need to **format the title** to:

- An appropriate name
- An appropriate font size
- An appropriate position

To format a title, follow the steps below:

1. Select the paintbrush icon
2. Select the Title drop-down
3. Change the Title to “Bowling Team”
4. Change the alignment to be centred

Remember to turn off the **Slicer Header** in the same menu.



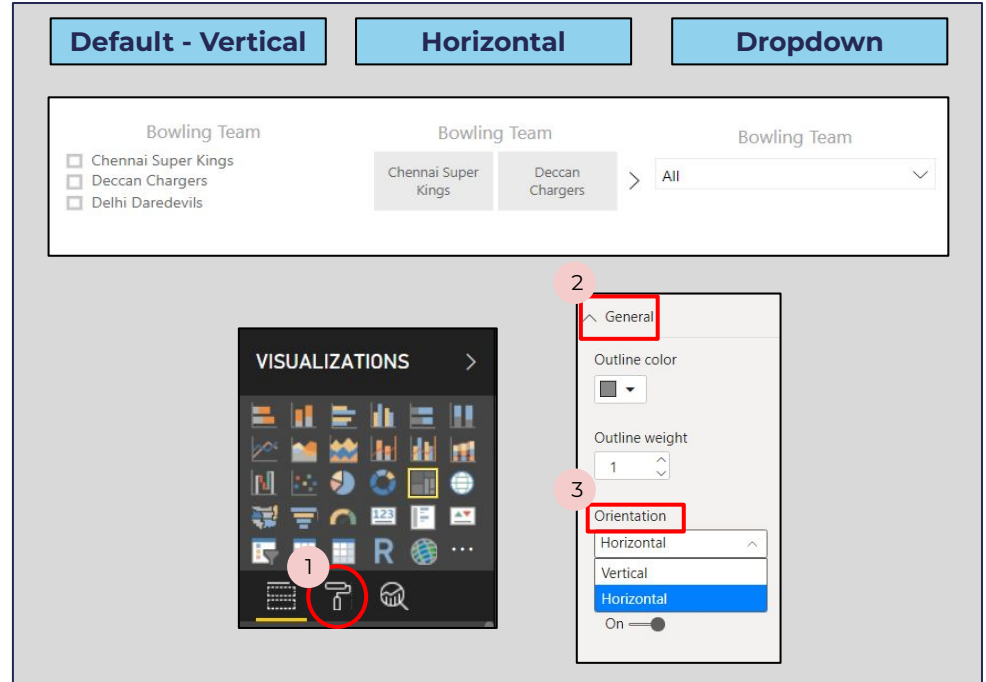
Formatting Visuals - Filters

There are three types of Filters:

- **Vertical** - categories displayed as a list of checkboxes (default)
- **Horizontal** - categories displayed horizontally in rectangles
- **Dropdown** - dropdown list of categories with checkboxes next to them

To format a filter to get a **vertical or horizontal orientation**, follow the steps below:

1. Select the visual and then the **paintbrush** on the right panel
2. Select the **General** dropdown option
3. Select the **Orientation** and your desired format



Formatting Visuals - Filters

There are three types of Filters:

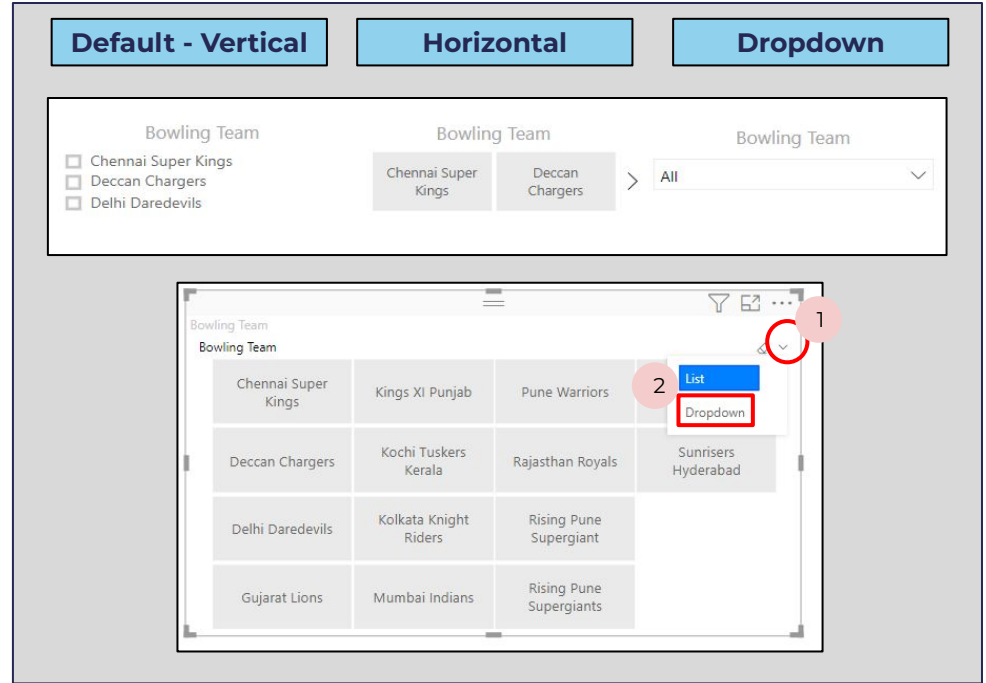
- **Vertical** - categories displayed as a list of checkboxes (default)
- **Horizontal** - categories displayed horizontally in rectangles
- **Dropdown** - dropdown list of categories with checkboxes next to them

To format a filter to get a **dropdown**, follow the steps below:

1. Select the visual and then the **downward arrow**
2. Select the **"Dropdown"** option

The vertical and horizontal options are only appropriate for a small number of categories.

In this case, the dropdown will suit best since we have many categories.



Formatting Visuals - Rounding

Numbers can appear in cards, tables or graphs. Some numbers have many decimals, which can take up space and also be difficult to read.

We, therefore, need to round these labels to an appropriate number of decimals.

Let's round the numbers on 2 of the 3 cards we created (Batsman Average and Batsman Strike Rate).

To format the **decimals** in a visual, follow these steps:

1. Select the visual and then the **paintbrush** on the right panel
2. Select the **"Data label"** dropdown
3. Change the **"Value decimal places"** to the appropriate decimal point level

Default	After Format
126.08 Batsman Strike Rate	126.1 Batsman Strike Rate
24.73 Batting Average	24.7 Batting Average

VISUALIZATIONS

1

2

3

Data label

Color

Display units

Auto

Value decimal places

2

Text size

27 pt

Font family

DIN

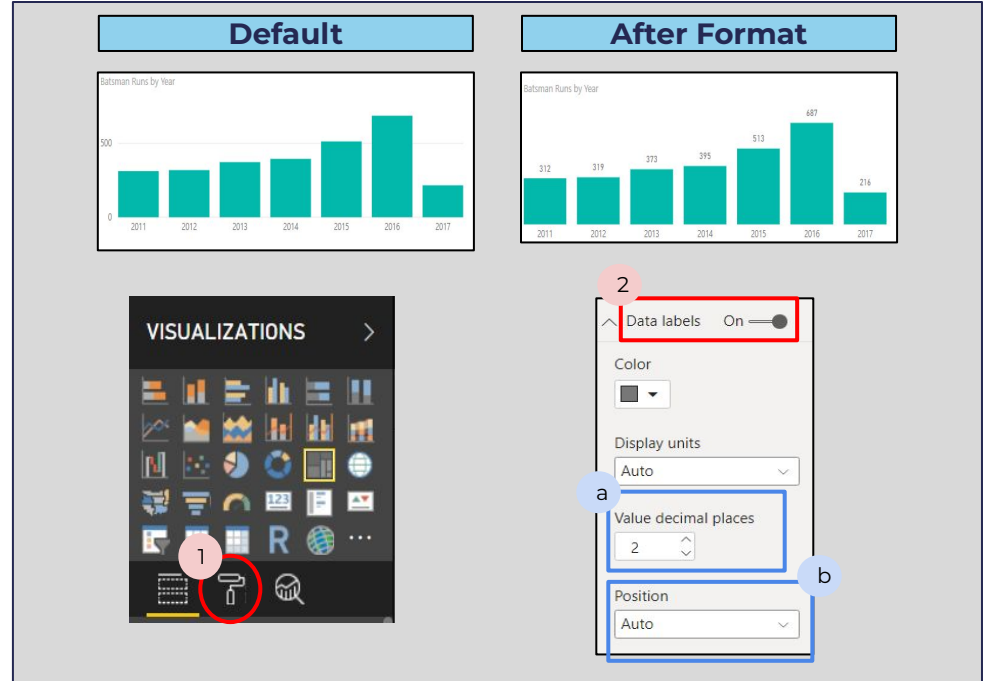
Formatting Visuals - Labels

Labels are a great visual indication to get precise numbers associated with each measurement on a visual or graph. They help differentiate measurements which are close in magnitude. In Power BI, you can add data labels to a graph manually.

To format the **Labels** in a visual, follow these steps:

1. Select the visual and then the **paintbrush** on the right panel
2. Select the “**Data label**” dropdown option and select the switch to **on**

Optionally, you can adjust the **decimal points and position** of labels indicated on the right diagram by letters **a** and **b**, respectively.



Key dos and don'ts regarding dashboards

DOs

Keep your visuals relevant to the audience

Group data logically

Align and format

Be wary of design elements
(colour, size, saturation)

DON'Ts

Choose design over explanation

Overlay graphs

Overpopulate the page

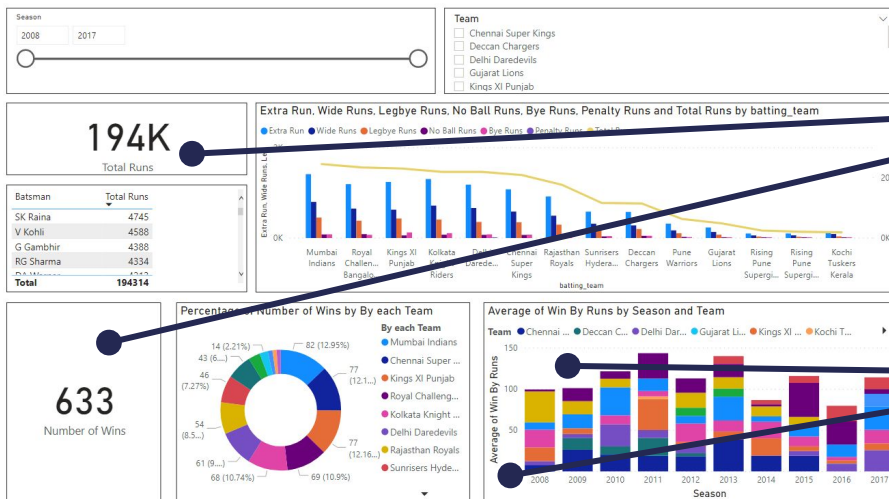
Change styling across pages

Key dos and don'ts regarding dashboards

DOs

Keep your
visuals
relevant to the
audience

Your audience wants to know the most successful batting team in the
IPL



Summarising
and visualising
the winning
teams is also
important

Runs are
displayed per
team and any
information
about runs

Key dos and don'ts regarding dashboards

DOs

Group data logically

Group data together to indicate relationships and a story ; plot similar variables



All run data is grouped on a single plot

Key dos and don'ts regarding dashboards

DOs

Group data logically

Group data together to indicate relationships and a story ; plot similar variables



All relevant data is grouped visually

Key dos and don'ts regarding dashboards

DOs

Align and
format

Keep graphs in line and format headings, data colour and labels



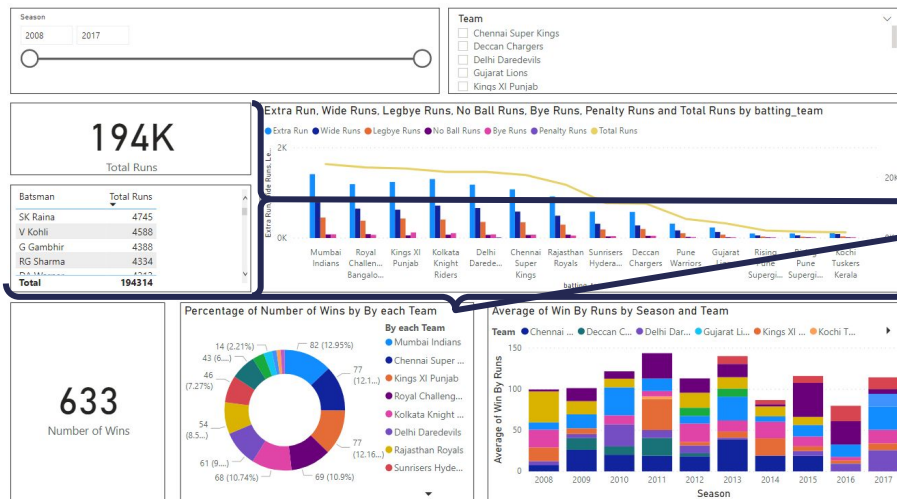
Make sure to
label your data
different colours

Key dos and don'ts regarding dashboards

DOs

Align and
format

Keep graphs in line and format headings, data colour and labels



Keep your
graphs and
scorecards in
line with each
other for a
cleaner look

Key dos and don'ts regarding dashboards

DOs

Be wary of design elements (colour and sizing)

Keep colours contrasting and font size and visuals as large as possible



Make your font clear and large; make sure your visuals are large and show enough contrast in size of the data

Key dos and don'ts regarding dashboards

DOs

Be wary of design elements (colour and sizing)

Keep colours contrasting and font size and visuals as large as possible



Contrasting colours help distinguish labels and classes

Contrasting colours help individuals with colour vision impairment

Key dos and don'ts regarding dashboards

DON'Ts

Choose design over explanation

Don't add unnecessary data



In this case, the filter for cities would be interesting, but the data is wrong and does not help to tell a story

Key dos and don'ts regarding dashboards

DON'Ts

Overlay
graphs

Overlaying graphs can interfere with the interactivity and story



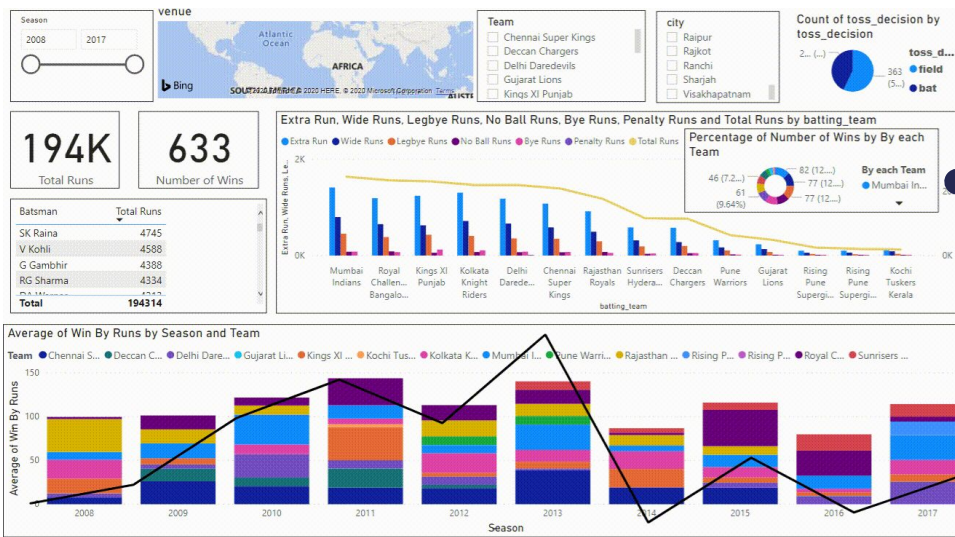
Overlaying
graphs can
misalign axes
and block other
visuals' text and
plotting space

Key dos and don'ts regarding dashboards

DON'Ts

Overpopulate
the page

Too many graphs can complicate the story



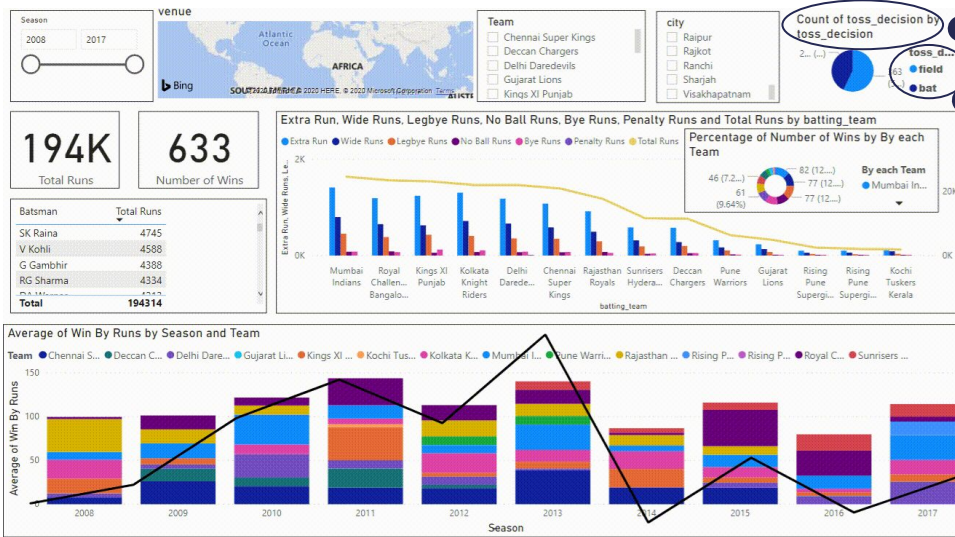
Excessive filters
and visuals can
complicate a
page.
Overpopulating
a page can
introduce
confusion, and
will look
crammed.

Key dos and don'ts regarding dashboards

DON'Ts

Change
styling across
pages

Inconsistent formatting looks unprofessional



Inconsistent font
styles and
naming
conventions can
be distracting.
Keep good
formatting
standards.

Conclusion

Why is formatting important?

- Formatting visuals are important when needing to clean up a dashboard
- Styling is important when creating a professional dashboard
- Power BI has a suite of formatting options to customise the appearance of a dashboard

You're now ready to make some awesome visuals in Power BI!

