

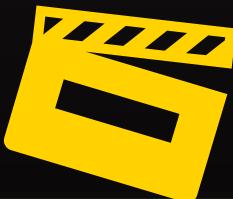
Patou Tips #23

Start with PowerBI

“From Rookie to Rock”

9 tips
explained
step by step
to practice

Quick Guide Visualization & Storytelling



Start with PowerBI

“From Rookie to Rock”



Visualization





About this step...

Ultimately, BI is the process of transforming data that machines understand into something that humans can act on, the visualization achieves the goal.

 Understanding your users' needs and activities is fundamental!

- ✓ 1 → Data Visualization Principles, Report or Dashboard?
- ✓ 2 → Choose the right chart
- ✓ 3 → Create an understandable KPI
- ✓ 4 → Add a PowerBI visual
- ✓ 5 → Create your own visualization!



- ✓ 5.1 Customized chart (for income statement)
- ✓ 5.2 Age Pyramid Chart

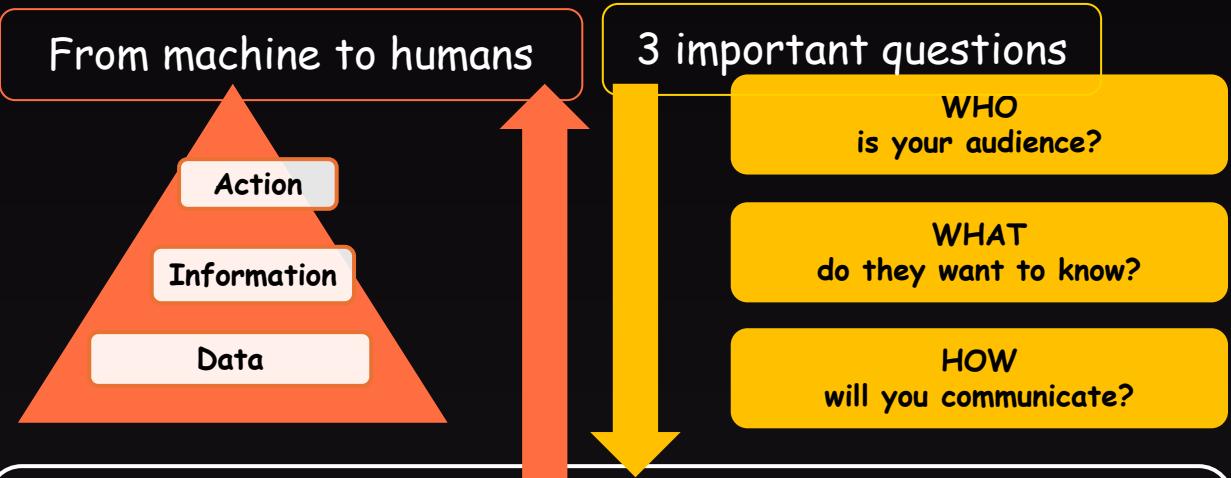
Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation



1 Data Visualization Principle Report or Dashboard?



Report or Dashboard?

Report: Provide summary information over a short or recent period; Sales brief, previous day's sales results, end-of-month report, etc.

Dashboard: Provide comprehensive information on where we have come from and where we are going: Monthly/half-yearly/quarterly/annual dashboard of sales, finances...

Often, confusion between reporting and monitoring:
monitoring consists of providing continuous information in order to follow an activity in real time (this is another goal)



Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

2

Choose the right chart (1/3)



Chart	When to use it?	Use cases
Bar Chart 	Show comparison or distribution of a variable	Monthly sales, age distribution, survey, Age Pyramid Chart
Line Chart 	Show change/trend over time	Monthly sales, forecast
Combo 	Show two related variables on different numeric scales	Financial results
Pie/Donut Chart 	Show part-to-whole composition	Marketing product, survey
Funnel 	Show and describe flows and processes	Sales funnel, marketing funnel

Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

2

Choose the right chart (2/3)



Chart	When to use it?	Use cases
Waterfall 	Show change over time with a part-to-whole composition	Decomposition PVM (Price Volume Mix)
Radar 	Compare values between multiples attribut	Product test, survey
Scatter Plot 	Show relationships between two numeric variables	Product cycle, ROI Cause and effect diagram
Sandkey 	Show relationships between input and output sources	Sales deformation, income statement deformation
Map 	Show composition using geographic coordinates	Regional sales, density of population

Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

2

Choose the right chart (3/3)



Where to find visuals?
(Report view)

Part-to-whole
composition

Change over time

Flows and
processes

Geographical

KPI



Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

3

Create an understandable KPI



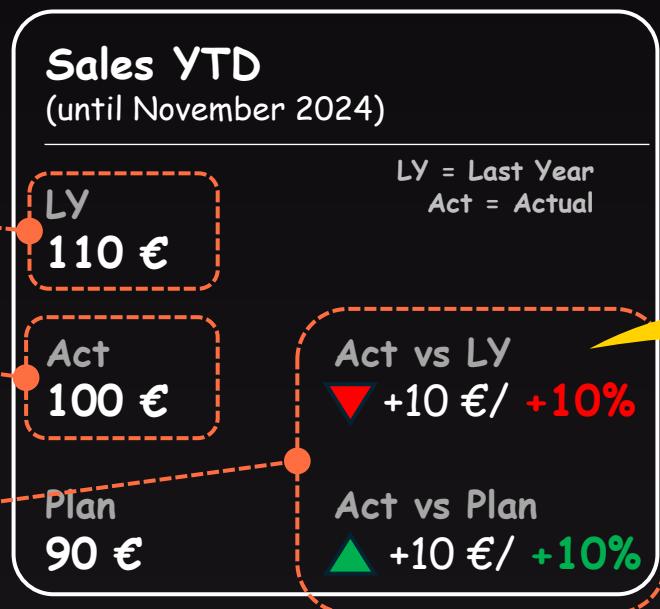
KPIs (Key Process Indicators) are a set of quantifiable measures used to understand the performance of a company. This information is an aid to operational or strategic decision-making.

Anatomy of a KPI

Where we come from?

Where we are?

Where we go?



See "Patou Tips #12", to calculate right evolution for KPI.

Start with PowerBI

"From Rookie to Rock"

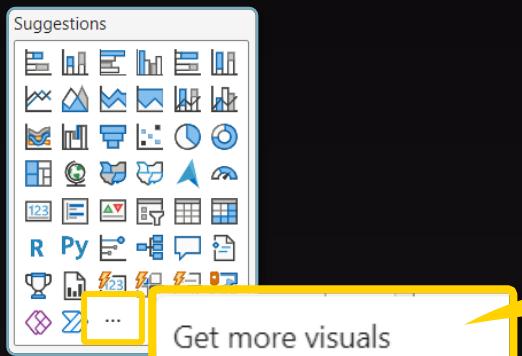
Step 4, Vizualisation

4

Add a PowerBI visual (1/5)



There is a huge marketplace where you can add powerful visuals for your projects.



Power BI visuals

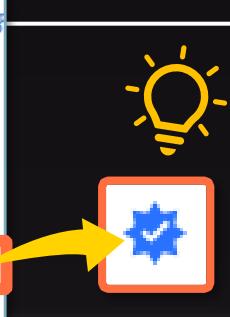
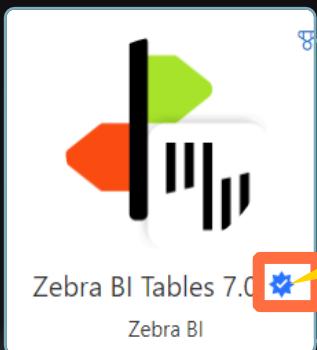
By clicking 'Add' and/or 'Download Sample' and downloading a visual, you agree to the provider's Terms and Conditions and Privacy Policy. On the visual's page and agree Microsoft can share your account details to provider for their transactional purposes. Use of Microsoft's AppSource is subject to the Microsoft Commercial Marketplace Terms and Privacy Statement.

All visuals Organizational visuals AppSource visuals Search

Explore all available visuals to magnify your business insights [Learn more](#)

Filter by: All Sort by: Popularity

Visual Name	Provider	Rating
Zebra BI Tables 7.0	Zebra BI	★★★★★ (12)
Performance Flow ...	xViz LLC	★★★★★ (16)
Sunburst by Power...	TRUVIZ INC	★★★★★ (8)



Make sure the visual is certified. This way, you will be sure that your visual can be published. Here, an incredible visual from "Zebra BI" for financial activities.

Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

4

Add a PowerBI visual (2/5)



The screenshot shows the Microsoft AppSource interface. A specific app, 'Performance Flow - xViz', is highlighted. The app's icon features a hierarchical tree diagram. Below the icon are buttons for 'Add' and 'Download Sample'. To the right of the icon, there are several numbered callouts: 1 points to the 'Add' button; 2 points to the 'Download Sample' button; 3 points to the 'PBI Certified' badge; 4 points to the 'Overview' tab; 5 points to the 'Plans + Pricing' tab; 6 points to the 'Ratings + reviews' tab; and 7 points to the bottom right corner of the app's preview area. A large yellow box highlights the preview area.

- 1 Add this app to your project.
- 2 Download a sample PowerBI file to check if it's what you want and how it works.
- 3 Check if the Apps is PBI Certified (by Microsoft).
- 4 See examples.
- 5 Some apps are not free, you can check here the pricing plan.
- 6 See user ratings and reviews.
- 7 Downloaded Apps will appear in the visual selection pane.

Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

4

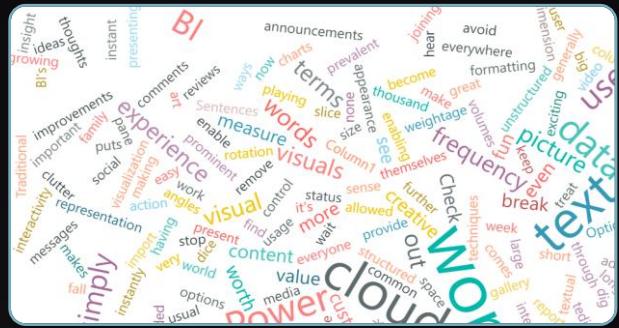
Add a PowerBI visual (3/5)



5 awesome, free and certified visual apps. These are also my favorites, and I tested them!

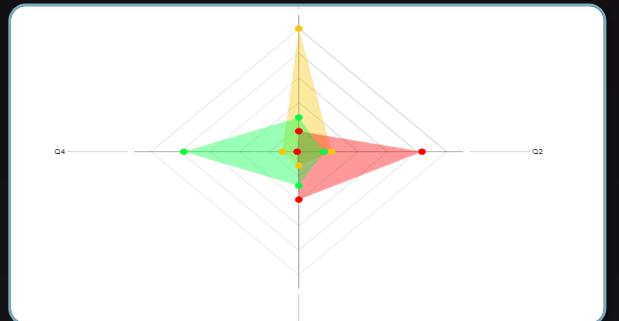
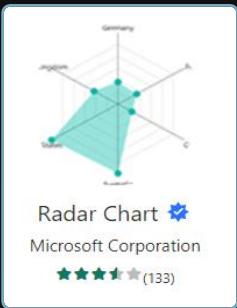
Word Cloud

Really useful for doing surveys and knowing what opinion comes up often.



Radar Chart

Interesting in finance for visualizations of the income statement according to the IBCS standard.



Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

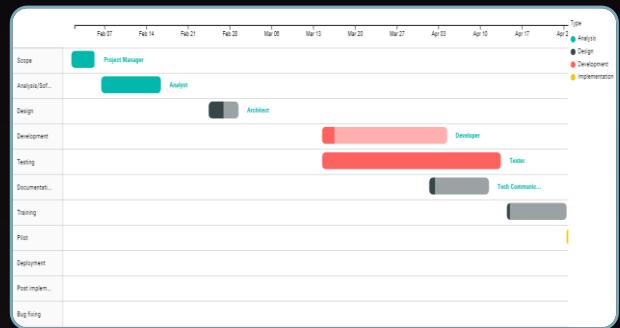
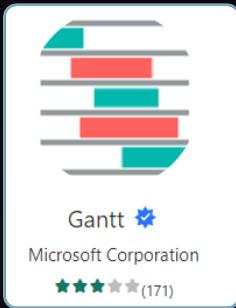
4

Add a PowerBI visual (4/5)



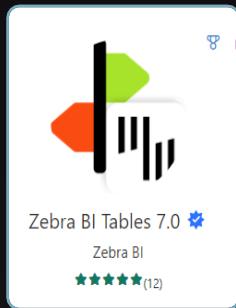
Gantt

Ideal for the project manager to create a Gantt chart and share with the teams the stages of a project.



Zebra BI Tables 7.0

Great financial visualizations of the income statement according to the IBCS standard. A must have.



Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

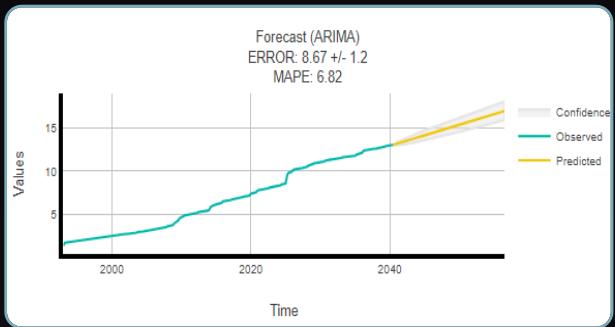
4

Add a PowerBI visual (5/5)



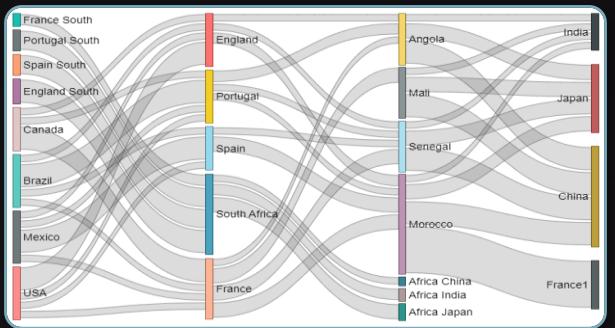
Forecast using multiple models
Add this app to your project (if you need it)

Forecast Using Mul...
MAQ LLC
★★★★★ (10)



Sankey chart
Sankey is a type of flowchart useful for visualizing the deformation of a variable through different categories.

Sankey Chart ⚡
Microsoft Corporation
★★★★★ (128)



Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

5

Create your own visualization! (1/12)



Practice



5.1 Customized radial chart (for income statement)

What we want to build...

Part by Product ● IceCream ● Macaron

Category	Value	Percentage
Sales 1600	63%	38%
COGS 950 (59%)	53%	47%
Gross Profit 650 (41%)	77%	23%

Easy to do it...

Patou Tips #5

💡

Create a **Customized Chart**
(for income statement)

To practice
downloadable free
resources in GitHub

To practice
downloadable free
resources in GitHub

5

Create your own visualization! (2/12)



5.1 Customized radial chart (for income statement)

About this Chart and the data set...

This graphic is really useful to display the repartition of dimension variable as product, customer by category result, here by income statement.

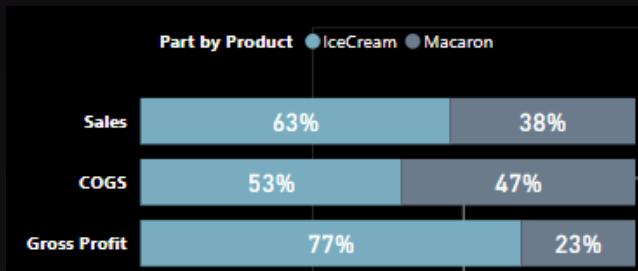


Stacked Bar Chart



Donuts

The max of the donut is 75%



Data set

Income Statement	Product	Value
Sales	IceCream	1000
Sales	Macaron	600
COGS	IceCream	500
COGS	Macaron	450
Gross Profit	IceCream	500
Gross Profit	Macaron	150



Data set come from the fictitious company based on Paris "IceCream' Macaron" from my book "Story of a Point"

5

Create your own visualization! (3/12)



5.1 Customized radial chart (for income statement)

Create a donut...

Erase detail label and put the 25% area in the same color like the background (here in black)

Mesure

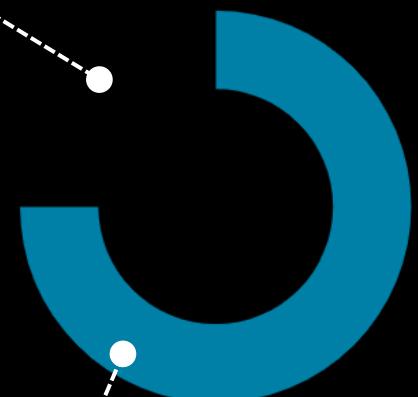
```
Graph Value blank =  
VAR Max_Value = CALCULATE(SUM(Data[Value]),Data[Income Statement]="Sales")  
RETURN Max_Value-[Graph Value]
```

400 (25%)

1200 (75%)

Mesure

```
Graph Value =  
CALCULATE(SUM(Data[Value]))*0.75
```



5

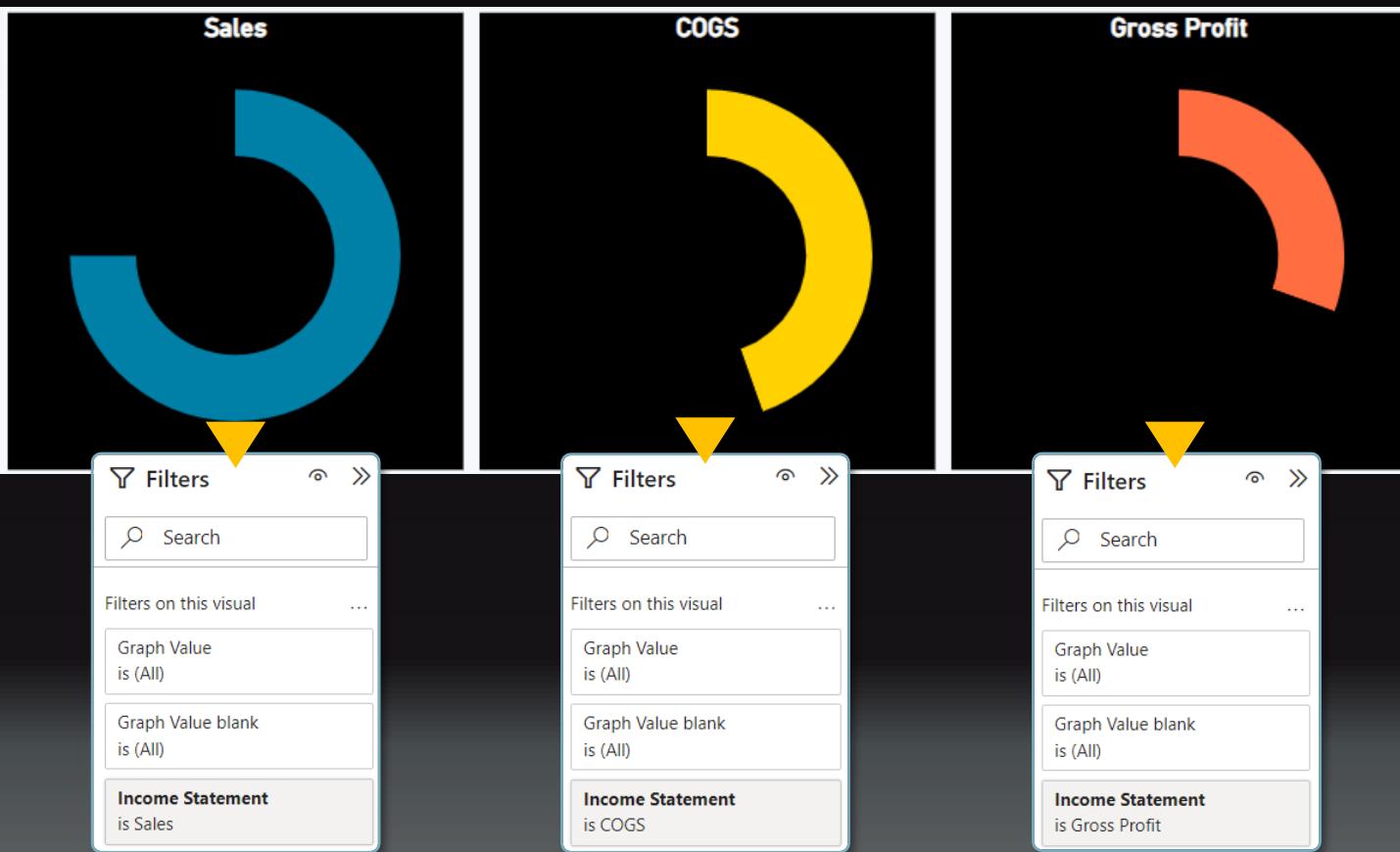
Create your own visualization! (4/12)



5.1 Customized radial chart (for income statement)

Create a donut for each category...

Assign the right filter (income statement) at each donut by the "filters panel"



5

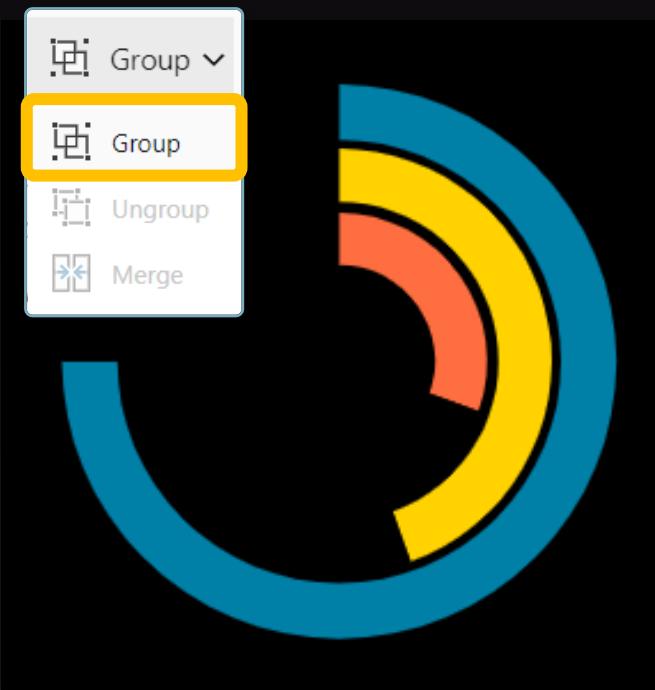
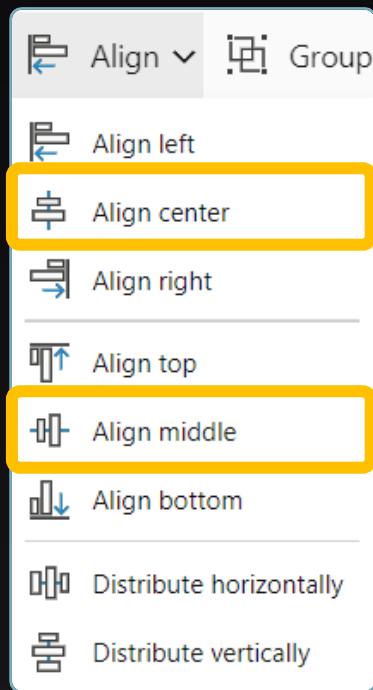
Create your own visualization! (5/12)



5.1 Customized radial chart (for income statement)

Bring together the donuts...

Align all the donuts by the center and by the middle and group it



5

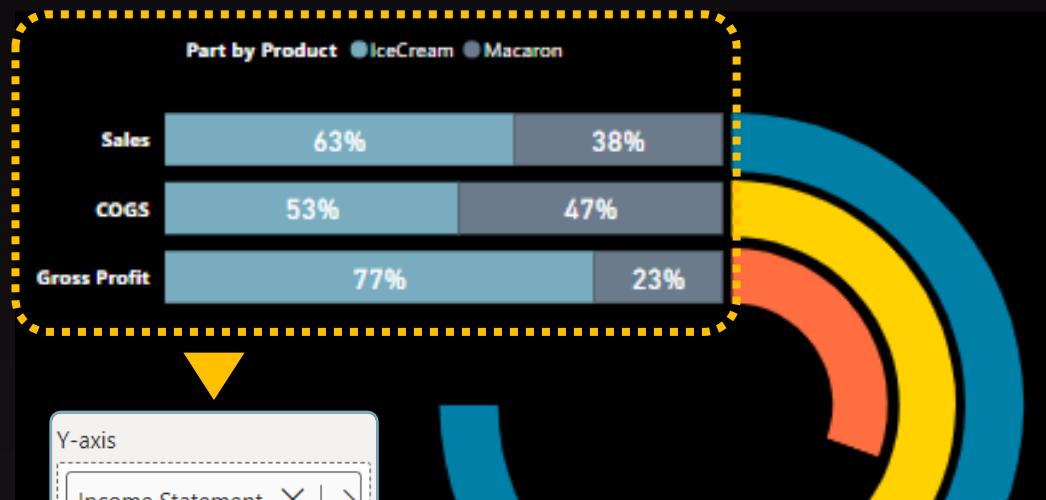
Create your own visualization! (6/12)



5.1 Customized radial chart (for income statement)

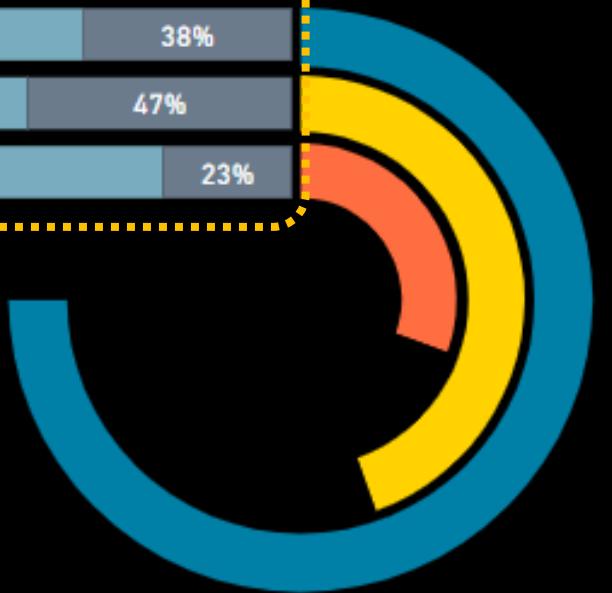
Create a "stacked bar chart"...

Create a "stacked bar chart" for the income statement distribution for each product



A screenshot of a visualization configuration interface with the following settings:

- Y-axis:** Income Statement (selected)
- X-axis:** Sum of Value
- Legend:** Product



5

Create your own visualization! (7/12)



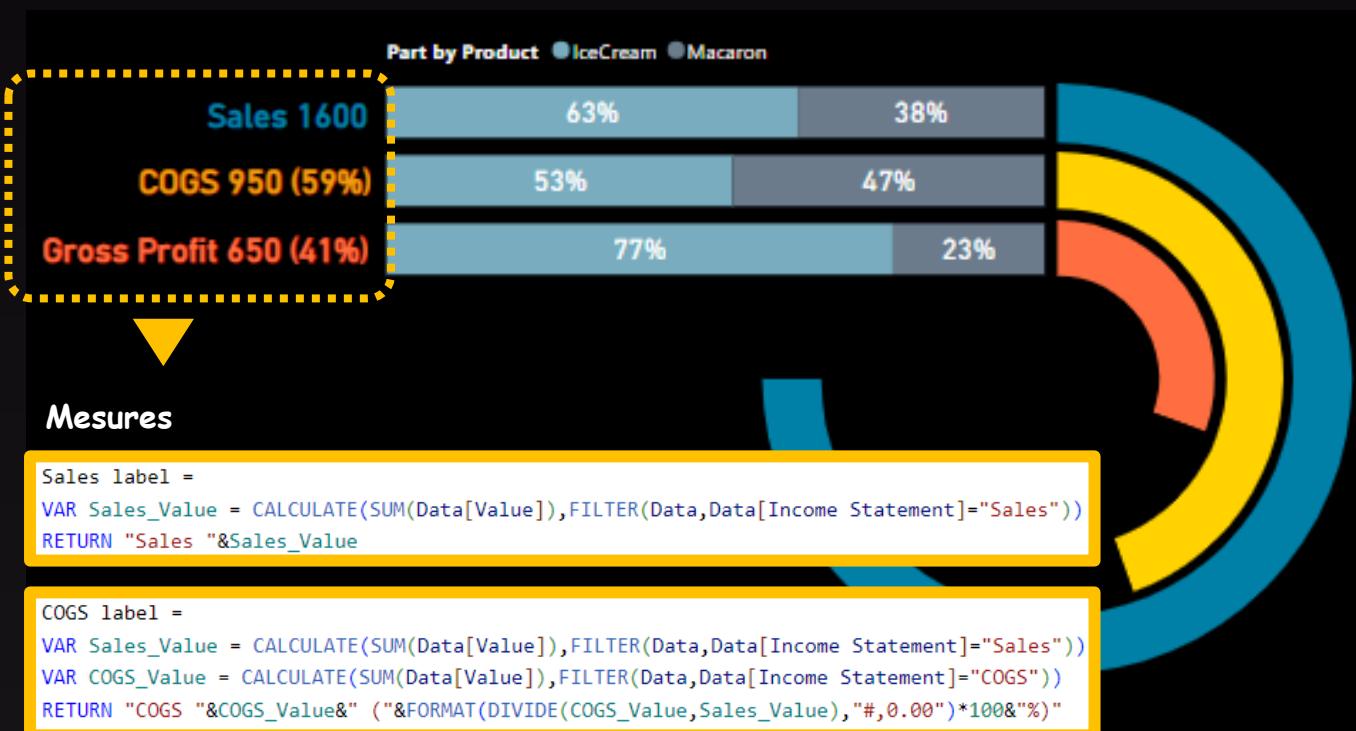
Practice



5.1 Customized radial chart (for income statement)

Create main labels, and it's finish!

Create labels and put colors like those of the circles.



```

Gross Profit label =
VAR Sales_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="Sales"))
VAR Gross_Profit_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="Gross Profit"))
RETURN "Gross Profit "&Gross_Profit_Value&" ("&FORMAT(DIVIDE(Gross_Profit_Value,Sales_Value),"#,0.00")*100&"%)"

```

5

Create your own visualization! (8/12)

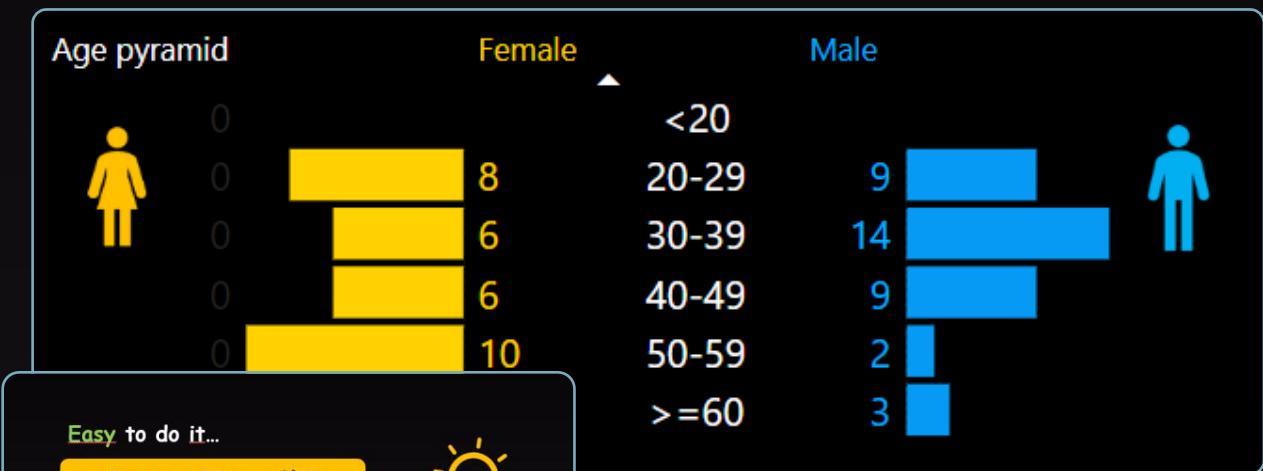


Practice



5.2 Age Pyramid Chart

What we want to build...



Create an **Age Pyramid Chart**
(for Human Resources)

To practice
downloadable free
resources in GitHub



To practice
downloadable free
resources in GitHub

5

Create your own visualization! (9/12)



5.2 Age Pyramid Chart

Create the « age range »

This graphic is really useful to display the repartition of employees by gender.

Data set → Table Data "HR"

Id_Employee	Age	Female/Male	Age Range
AA10000000	39	Female	30-39
AA10000001	62	Male	>=60
AA10000002	31	Male	30-39
AA10000003	27	Female	20-29
AA10000004	47	Male	40-49
AA10000005	36	Male	30-39

Find the data and the PowerBi file to practice with the link on the first page or in the LinkedIn post.

```

1 Age Range =
2 SWITCH(TRUE(),
3     'Data HR'[Age]<20,"<20",
4     'Data HR'[Age]<30,"20-29",
5     'Data HR'[Age]<40,"30-39",
6     'Data HR'[Age]<50,"40-49",
7     'Data HR'[Age]<60,"50-59",
8     'Data HR'[Age]>60, ">=60")

```

Create a calculated column in the table "Data HR" and put the formula

5

Create your own visualization! (10/12)

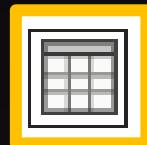


5.2 Age Pyramid Chart

Create a table and the measures...

Mesures

- #Female
- #Female graph
- #Male
- #Male graph



Age pyramid	X >
#Female	X >
#Female graph	X >
Age Range	X >
#Male graph	X >
#Male	X >

#Female	#Female graph	Age Range	#Male graph	#Male
8	8	20-29	9	9
6	6	30-39	14	14
6	6	40-49	9	9
10	10	50-59	2	2
1	1	>=60	3	3
31			37	37

Style presets

Style

None

```

1 #Female =
2 CALCULATE(
3     DISTINCTCOUNT('Data HR'[Id_Employee]),
4     FILTER('Data HR','Data HR'[Female/Male]="Female")
5 )

```

```
1 #Female graph = [#Female]
```

5

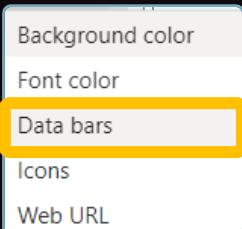
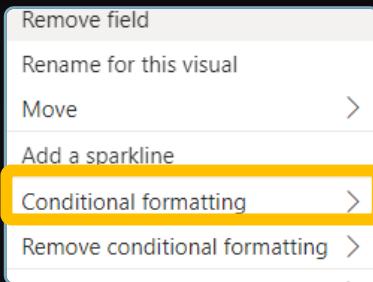
Create your own visualization! (11/12)



5.2 Age Pyramid Chart Format the graph (1/2)

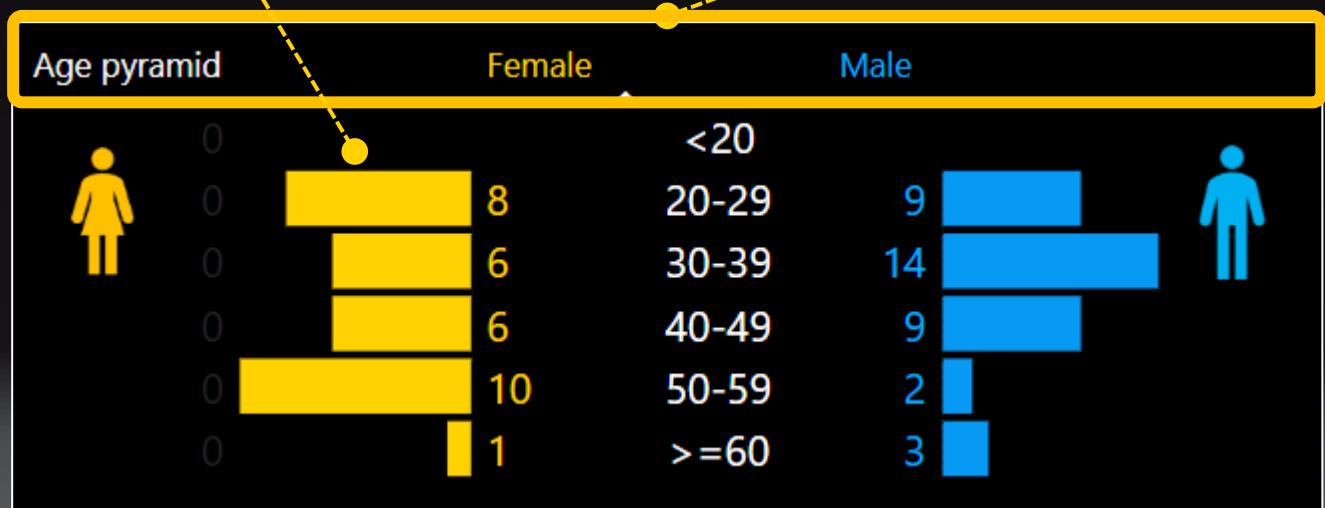
Column header

Bars



Age pyramid	X >
	X >
Female	X >
	X >
Male	X >
	X >

Rename the columns.
Use "space" to disappear some labels.

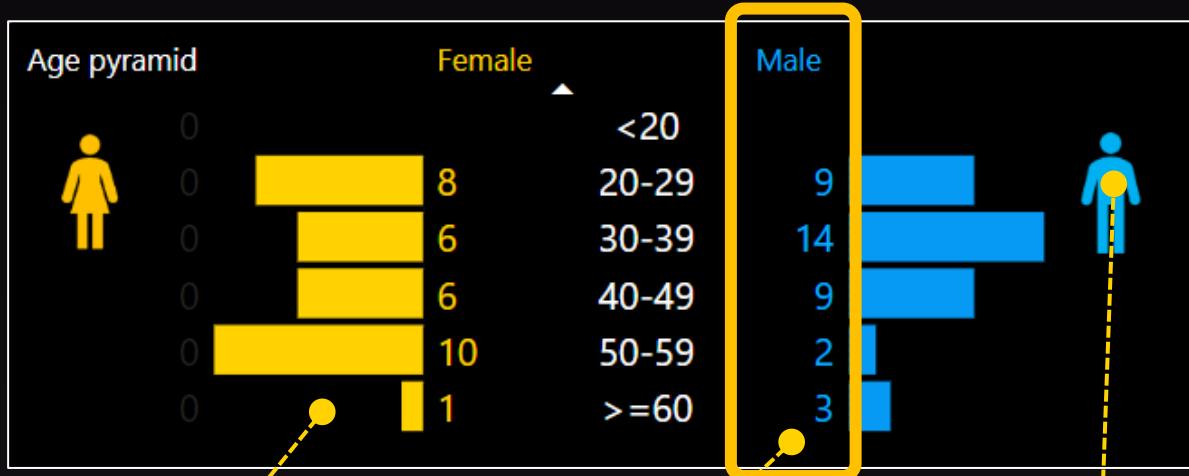


5

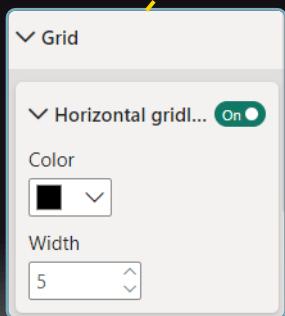
Create your own visualization! (12/12)



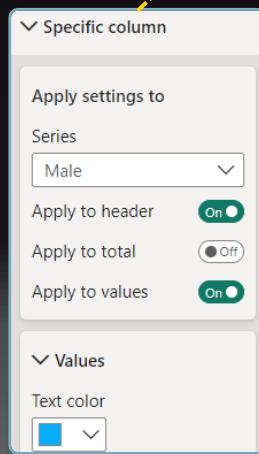
5.2 Age Pyramid Chart Format the graph (2/2)



Grid



Column



Icons
See Patou Tips #6

To go further...



6 great ressources!



Aleksandra Godlewska

Power BI Expert | Designer | Microsoft Power
Cracow Metropolitan Area

Expérience : Visual Finance, PwC Polska



25 relations en commun



Kavita Behera

LinkedIn Top Voice | Product Manager | Dat
New Delhi

17 k abonnés



29 relations en commun



Nicholas Lea-Trengrouse

Power BI Disrupter | Head of Business Intelligence
Gloucestershire

Expérience : Columbus, Patchworks et 12 autre



34 relations en commun



Gustaw Dudek

-- Power BI Problem Solver -- Head Of Busine
Katowice Metropolitan Area

36 k abonnés



55 relations en commun



Andrzej Leszkiewicz

Power BI Developer and Consultant | IBCS® C
Cracow

9 k abonnés



30 relations en commun



Iwa Sanjaya

Reporting Analyst | Data Storyteller
Jakarta Metropolitan Area

Expérience : Plasticpay et PT. Sentra S



14 relations en commun

Start with PowerBI

"From Rookie to Rock"

Step 4, Vizualisation

Start with PowerBI

“From Rookie to Rock”



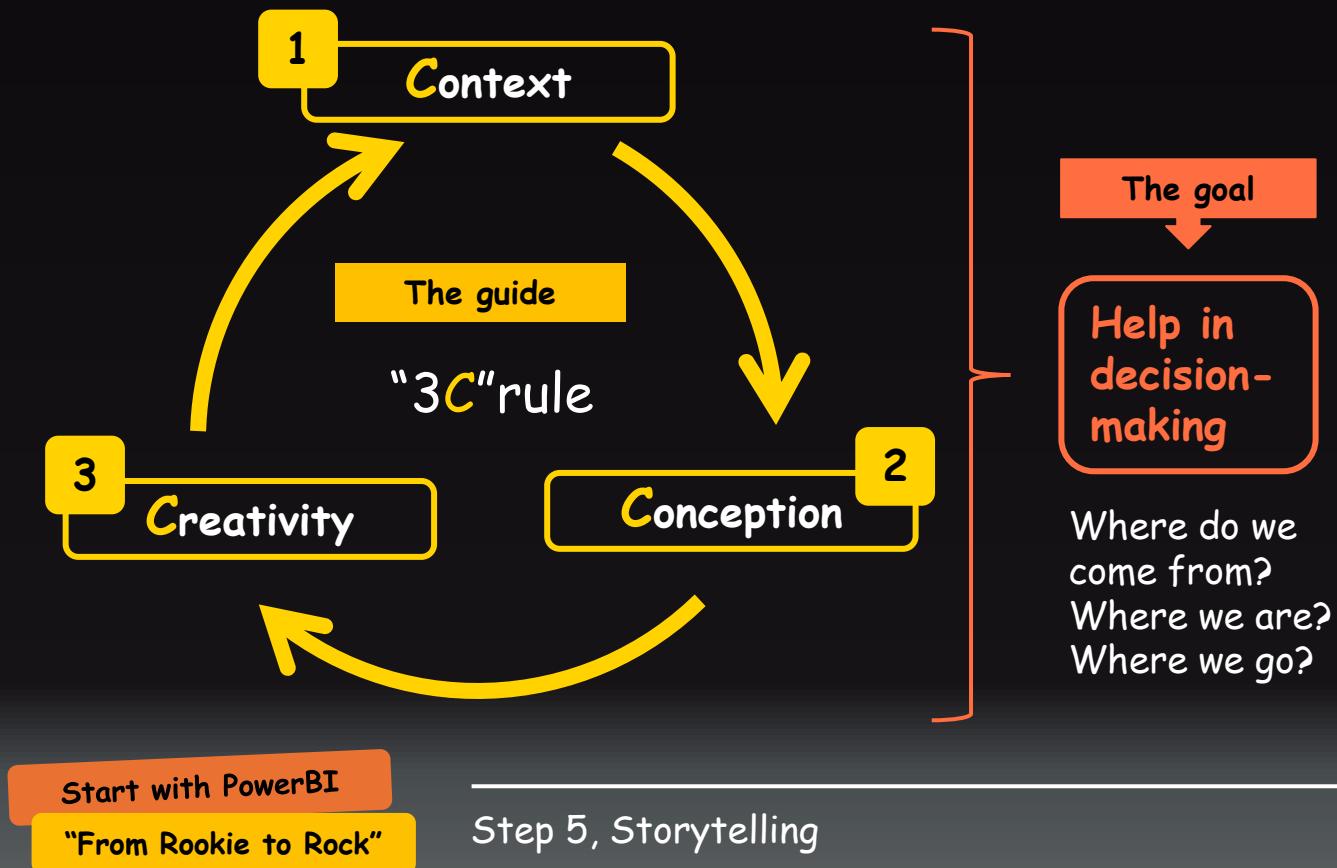
Storytelling





About this step (1/2)...

This step calls upon both **reason (technical)** and **heart (feeling)**. Your project must be understood and easily exploitable and help in decision-making. Here are my main big tip, the “**3C**” rule.





About this step (2/2)...

- ✓ 1 → Understand Context → Create the story
- ✓ 2 → Conception → Build the story
 - ✓ 2.1 Composition
 - ✓ Dashboard anatomy
 - ✓ Optimize page format
 - ✓ 2.2 Colors
 - ✓ Create a color theme, 3 main colors
 - ✓ Use sentiment colors
 - ✓ 2.3 UI/UX, help your users
 - ✓ Create movie to help your users in PowerBI
 - ✓ Increase User eXper. with Headers Icons
- ✓ 3 → Creativity → Give impact to your story
 - ✓ 3.1 Colors: Get the right harmony!
 - ✓ 3.2 Draw, don't write!
 - ✓ 3.3 Best practices
- ✓ 3 → Ressources

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

1

Understand Context Create the story



Memo

Understand business needs and codes

- Which business?** IT, Finance, Manufacturing, Media, Healthcare, Logistics, Retail, Energy, Construction, Education...
- Which activity?** SI, Finance, Communication, Marketing, Education, Health...
- Specific things to know!** Politics elements, operational or strategic objectives, culture and history of the firm, specific calculation, data sources...

Constructing the story; beginning, middle and end

- Which audience?** Type of audience, only one, several...
- Which visual?** Table, graph, chart, text...
- Big idea!** Articulation, UI/IX relationship, relevant points, data to demonstrate...



Never work alone this step, work with at least one business professional to validate the scenarios.

The goal

Help in decision-making

Where do we come from?
Where we are?
Where we go?

Start with PowerBI

"From Rookie to Rock"

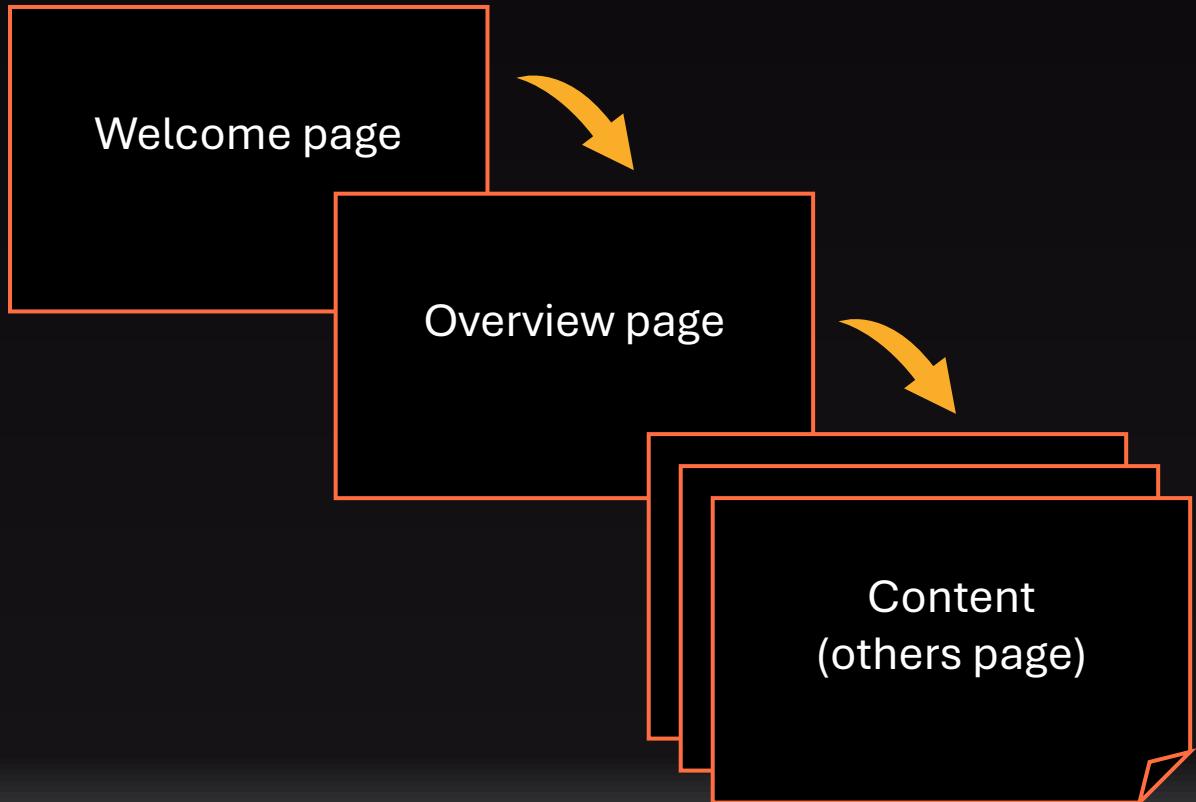
Step 5, Storytelling

2

Conception Build the story



2.1 Composition (1/4) Dashboard anatomy



2

Conception Build the story



2.1 Composition (2/4)

Welcome page

KPI Report

Access to the main KPIs representative of the activity of Massachusetts General Hospital

START

Created by Patrice Fayard

in GitHub

Example: My submission for the "Maven Challenge Hospital" of June 2024



Elements on a "Welcome page":

- Dashboard Theme
- Start button (to overview page)
- Last update information
- Data date range information, data source name...
- Author: name, web link

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception

Build the story



2.1 Composition (3/4)

Overview "page"

The screenshot shows a Power BI dashboard for Northwind Traders. Key elements include:

- 1 Firm/entity name/logo: Northwind Traders
- 2 Navigation page pane: A sidebar with 'Overview', 'Revenue', 'Customers', 'Products', 'Employees', and 'Delivery' buttons.
- 3 Filters (here filters are in a pop-up): A modal window showing filters for Product Category, Product, Customer, Employee, and Shipper.
- 4 Filter selection informations: Top navigation bar showing 'Period Selected > 2015 (from 01/01/2015 to 06/05/2015) compared with the same dates on Previous Year (PY)' and 'Filters selected > (Customer = All) + (Category = All) + (Product = All) + (Employee = All) + (Shipper = All)'.
- 5 KPIs: Sales (440 624), Customers (81), Orders (270), and Delivery (8,04).
- 6 Visualizations: A line chart showing Net Sales over time (janv to mai 2015) and a world map showing top countries by sales.

Elements on a "Overview page":



- 1 Firm/entity name/logo
- 2 Navigation page pane
- 3 Filters (here filters are in a pop-up)
- 4 Filter selection informations
- 5 KPI
- 6 Visualizations

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception

Build the story



2.1 Composition (4/4)

Content (other pages)



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception

Build the story



2.1 Composition (4/4)

Optimize page format



1080 x 1920 is a very interesting format to optimize space and font. It is best for working with tables, legends, titles, subtitles, etc.

Canvas settings

Type: 16:9
Height: 720 px
Width: 1280 px

Income Statement		2022	2023	Variation
Sales		600	1000	67 % ▲
COGS		-450	-500	-11 % ▼
Gross Profit		150	500	233 % ▲

Canvas settings

Type: Custom
Height: 1080 px
Width: 1920 px

Income Statement		2022	2023	Variation
Sales		600	1000	67 % ▲
COGS		-450	-500	-11 % ▼
Gross Profit		150	500	233 % ▲

Same table, with a different page format.

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story



2.2 Colors, create a color theme, 3 main colors (1/5)

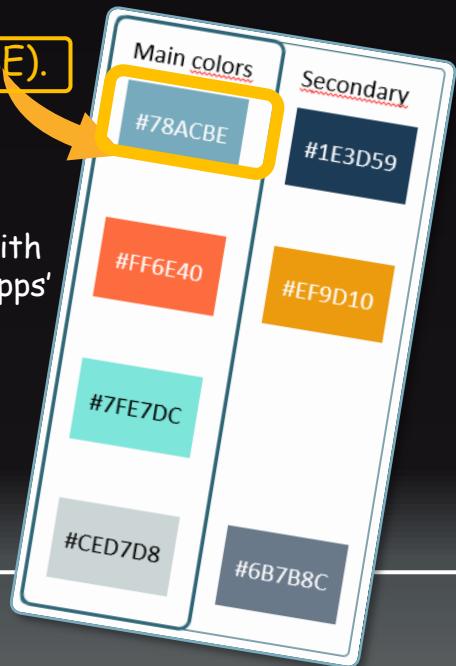
For my book "Story of a point", I took my **inspiration** from the book "Super Graphic", Tim Leong (June 2013). An amazing book for color research. When I find **3 main colors**, I search for the **hexadecimal code** with my smartphone and the "What a color?" mobile application. This application is really useful to catch the color and the **hexadecimal code**.

With PowerPoint I test a lot of colors until I find **3 main colors** (but here 4) and **3 secondary colors**. My favorite color for the book theme and for PowerBI files is the color called:

"Dark Pastel Blue (hexadecimal code: #78ACBE)".



Get hexadecimal code with
"what a color?" mobile apps'



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

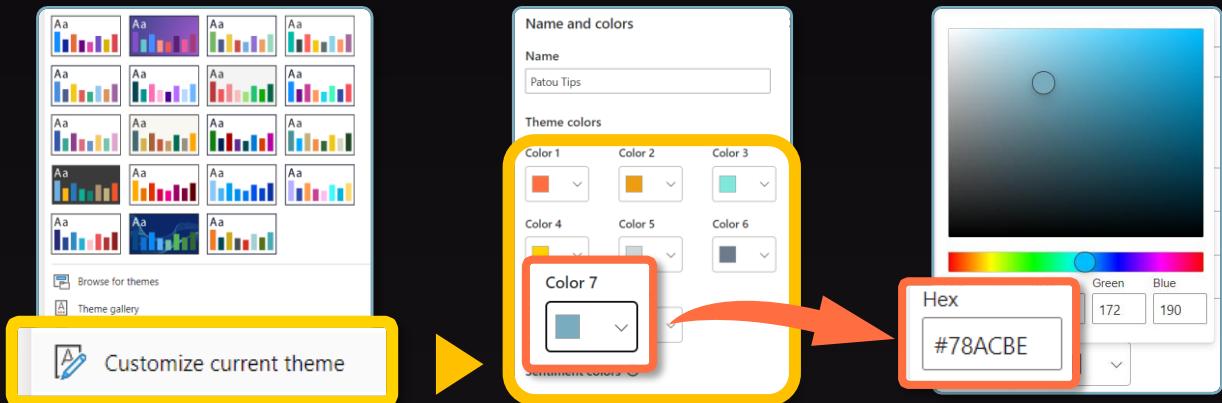
Conception Build the story



2.2 Colors, create a color theme, 3 main colors (2/5)

On PowerBI click on
“Customize current theme”
Path: View > Themes

7 colors chosen before, put the hexadecimal codes for each colors.



Save your final color theme
If you want to use it for another
PowerBi project. A json file will be
create, ready to use!

Save current theme

Patou Tips Colors.json

Start with PowerBI

“From Rookie to Rock”

Step 5, Storytelling

2

Conception Build the story



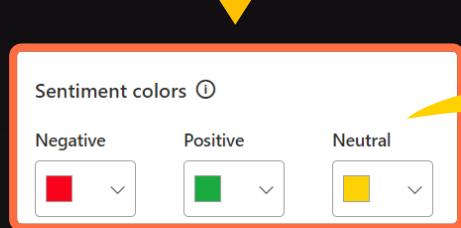
2.2 Colors, use sentiment colors (3/5)

These three colors are important to mean which result is good and what is not.



Customize current theme

On PowerBI click on "Customize current theme" Path: View > Themes



Anatomy of
a KPI

Where we
come from?

Where
we are?

Where
we go?

Sales YTD
(until November 2024)

LY = Last Year
Act = Actual

LY
110 €

Act
100 €

Plan
90 €

Act vs LY
▼ +10 €/ +10%

Act vs Plan
▲ +10 €/ +10%



In the reality, I use only "Green (Good)" and "Red (Bad)" colors.

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story

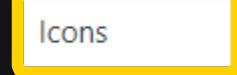
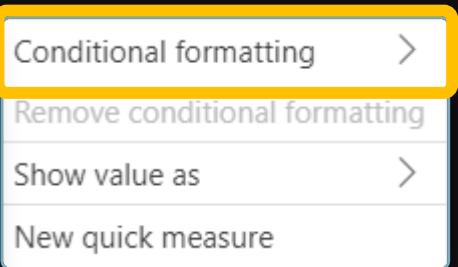


2.2 Colors, use sentiment colors (4/5) Create icons sentiments colors

Before

Income Statement		2022	2023	Variation
Sales		600	1000	67 %
COGS		-450	-500	-11 %
Gross Profit		150	500	233 %

Right click on the name of the measure on the "Build" pane



After

Income Statement		2022	2023	Variation
Sales		600	1000	67 %
COGS		-450	-500	-11 %
Gross Profit		150	500	233 %

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception

Build the story



2.2 Colors, use sentiment colors (5/5)

Create icons sentiments colors

Icons - Variation

Format style

Apply to

Rules

Values only

What field should we base this on?

Variation

Icon layout

Icon alignment

Style

Right of data

Top

Custom

Rules

Rules

If value \geq Min Number and < 0 then

If value \geq 0 Number and \leq Max Number then

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story



2.3 UI/UX, help your users

Create a movie to help your users in PowerBI (1/6)

For the "Maven Northwind Challenge", I wanted that the users can have inside the dashboard, a movie to show all the features of the project and how it works...



Easy to do it...

Patou Tips #4



Create a movie
to help your users
in PowerBI



downloadable free
resources to practice
in GitHub



To practice
downloadable free
resources in GitHub

2

Conception

Build the story



2.3 UI/UX, help your users

Create a movie to help your users in PowerBI (2/6)

When the user is drag on hover the mention "how it works?"...

...A movie appear inside the dashboard PowerBi to help the users!

Dashboard Overview:

- SALES:** 440 624 (Net Sales (USD))
- CUSTOMERS:** 81 (# of Customers)
- ORDERS:** 270 (# of Orders)
- DELIVERY:** 8,04 (Av. Days To Ship)

3D Line Chart Trends:

- janv: 105K
- fevr: 124K
- mars: 96K
- avr: 119K
- mai: 124K

Product Category:

Category	Sales	% PY
Food	41 211	119 %
Customer	37 217	119 %
Employee	36 310	119 %
Shipper	23 821	119 %
Total	21 238	119 %

Most Important Categories:

Category	Sales	% PY
Food	41 211	119 %
Customer	37 217	119 %
Employee	36 310	119 %
Shipper	23 821	119 %
Total	21 238	119 %

Product Name:

Name	Sales	% PY
Côte de Boeuf	13 683	132 %
Thüringer Rostbratwurst	13 345	232 %
Raclette Courdouillet	17 295	98 %
Camembert Pierrot	15 993	175 %
Tarte au sucre	26 346	5 %

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception

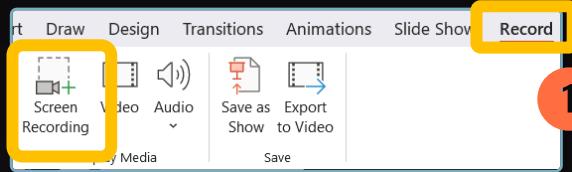
Build the story



2.3 UI/UX, help your users

Create a movie to help your users in PowerBI (3/6)

Create the movie in PowerPoint



1

On PowerPoint:
Path: Record > Screen
Recording



2

A pop-up appear, with the button "Select Area" select the area on your PowerBI project. A dashed red line indicate you the area.

3

Click on record to start and the touches
↑ + ⌘ + Q to stop the movie. It's done!

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story



2.3 UI/UX, help your users

Create a movie to help your users in PowerBI (4/6)

Save the movie as an animated GIF

File name: How it works.mp4

Save as type: Media File (*.mp4)

In PowerPoint save your record as MP4 format



Convertio

Use an online service or a software to convert your file from MP4 format to an animated GIF. Here I use "Convertio"

How it works.gif

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story



2.3 UI/UX, help your users

Create a movie to help your users in PowerBI (5/6)

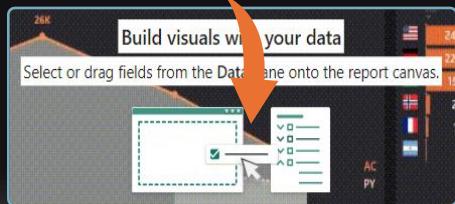
On PowerBI, create a new page for the animated GIF

Settings of
the page

The image displays three sequential screenshots of the PowerBI 'Format' pane, illustrating the configuration of a new page:

- Page information:** Shows the page name set to "How it works?" and the page type set to "Tooltip".
- Canvas settings:** Shows the "Type" dropdown set to "Custom". Other settings include Height (480 px), Width (750 px), and Vertical alignment (Middle).
- Canvas background:** Shows the "Image" field set to "How it works.gif", with options for "Image fit" (Fit) and "Transparency" (0%).

Create a white frame to display better your movie in the dashboard, and to don't have the following display



The image displays two screenshots of the PowerBI 'Shape style' and 'Border' settings panes:

- Shape style:** Shows the 'Shape' dropdown set to 'Rectangle'.
- Border:** Shows the 'Color' dropdown set to white.

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling



2.3 UI/UX, help your users

Create a movie to help your users in PowerBI (6/6)

On PowerBI, create a button

The screenshots illustrate the configuration of a button in PowerBI:

- Step 1:** The ribbon shows the "Buttons" tab is selected. A button labeled "Information" is highlighted.
- Step 2:** The "Text" properties pane is open for the "How it works?" button. It shows the text "How it works?", font "Segoe UI", size 10, and padding of 4px on all sides.
- Step 3:** The "Icon" properties pane is open for the "Information" icon. It shows the icon type as "Information", line color black, weight 3px, transparency 0%, and icon placement as "Custom".
- Step 4:** The "Properties" tab is selected in the ribbon. The "Icons" section shows various drill-down options like "Drill up" and "Drill down" are off. The "Help tooltip" section is highlighted, showing it is turned on.
- Step 5:** The "Help tooltip" properties pane is open. It shows the "type" is set to "Report page" and the "Tooltip text" is "Follow the guide".

The final result: Drag on hover the button "How it works?" a help symbol (?) appear, to drag on hover this symbol will display the movie from your animated GIF.

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story



2.3 UI/UX, help your users

Increase User eXperience with Headers Icons

It is interesting to increase the user experience (UX) in your PowerBI charts (and tables) with the “Header Icons” features.

Easy to do it...

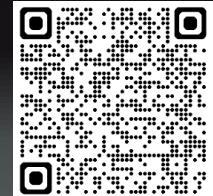
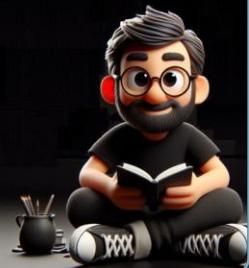
Patou Tips #11



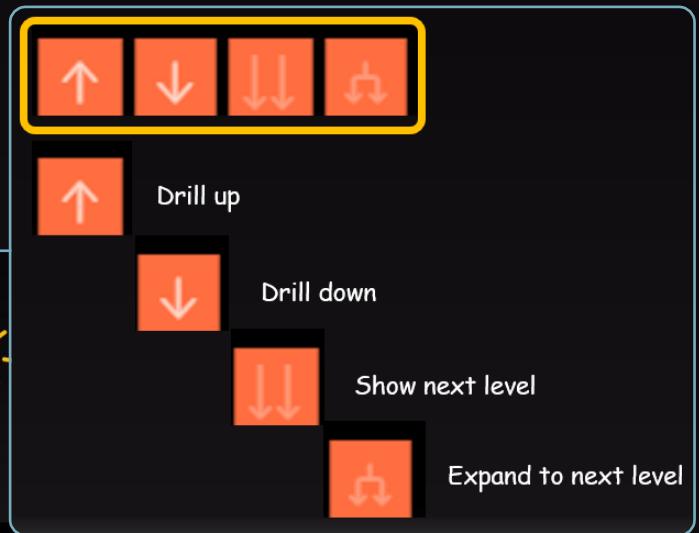
Increase User eXperience
in your PowerBI projects
with **Headers Icons**



To practice
downloadable free
resources in GitHub



To practice
downloadable free
resources in GitHub



2

Conception Build the story



2.3 UI/UX, help your users Increase User eXperience with Headers Icons



Drill
down



Drill up to
go to the
previous
graph

Sales detail of 2023
is the new graph



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

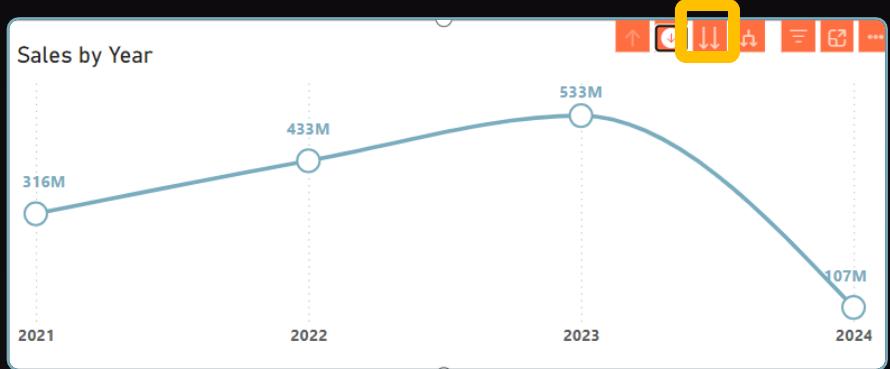


2.3 UI/UX, help your users

Increase User eXperience with Headers Icons



Show
next
level



Sales detail of all the years by month is the new graph.



In this case, this view is wrong, sales from 2021 till 2024 are aggregated by month.



2

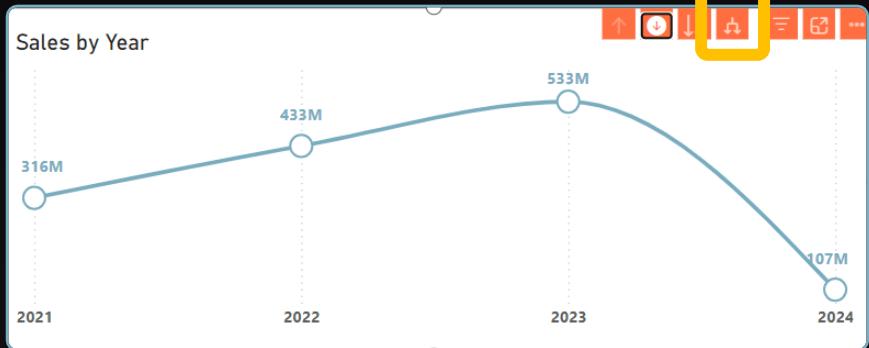
Conception Build the story



2.3 UI/UX, help your users Increase User eXperience with Headers Icons



Expand to
next level



Sales detail of
all the years by
month is the new
graph.



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

2

Conception Build the story



2.3 UI/UX, help your users

Increase User eXperience with Headers Icons

Now you know how it works and you can choose whether or not to enable these features. But remember that your configuration will be effective as soon as your report is published.



Drill up



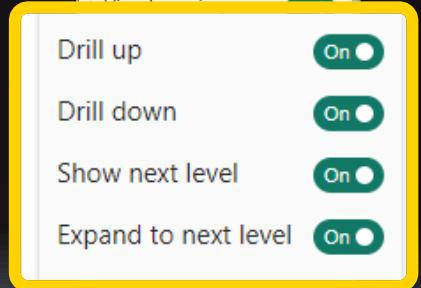
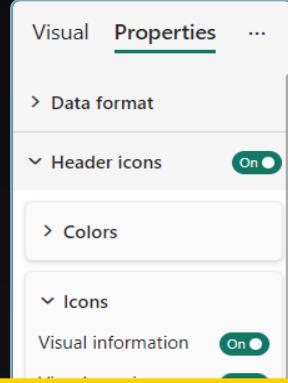
Drill down



Show next level



Expand to next level



Start with PowerBI

"From Rookie to Rock"

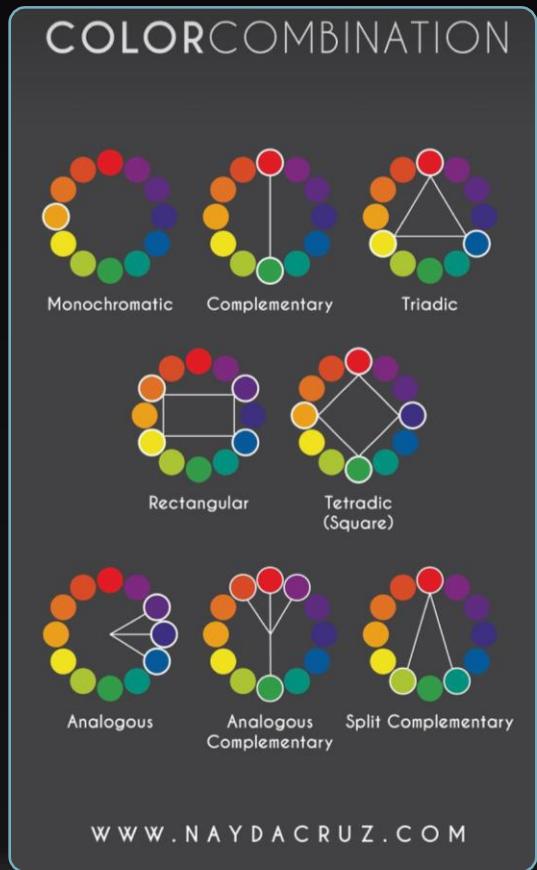
Step 5, Storytelling

3

Creativity Give impact to your story



3.1 Colors: get the right harmony!



Anything is possible, but often it's better to create your color theme according to color combination rules.

Sometimes, when I find colors, I reopen my project a few days later just to see if the impact or mood I wanted is still the same.

Sometimes I change the theme 4 or 5 times!

Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

3

Creativity Give impact to your story

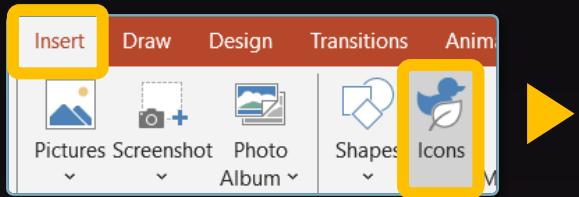


3.2 Draw, don't write!

Create Customized Icon (with PowerPoint for PowerBI)

Create icon in PowerPoint

- 1 Choose an icon from the PowerPoint library



- 2 Change the color of the icon, and right click on the new icon and select "save as Picture"

Save as Picture...

- 3 Save it as "png" format



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

3

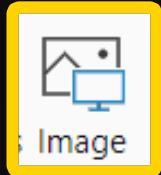
Creativity Give impact to your story



3.2 Draw, don't write!

Create Customized Icon (with PowerPoint for PowerBI)

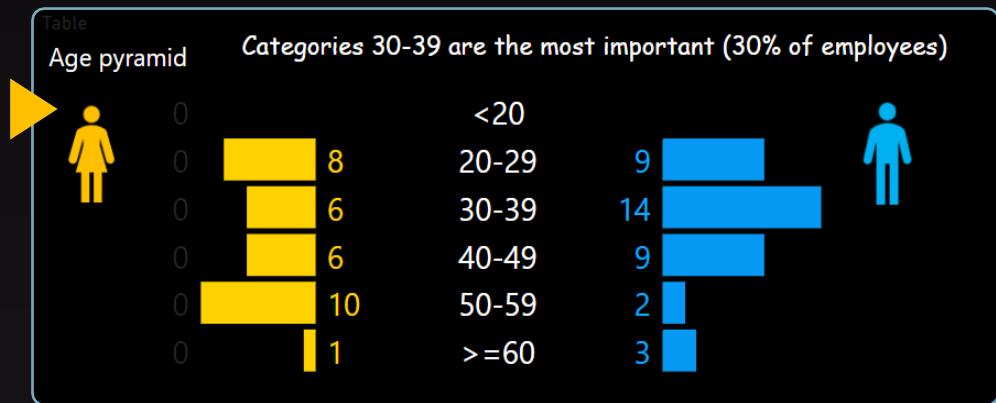
Import to add graphic elements



Insert > Images

Here I insert it as legends with the same colors as the lines.

It's faster for your users, no need to read!



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

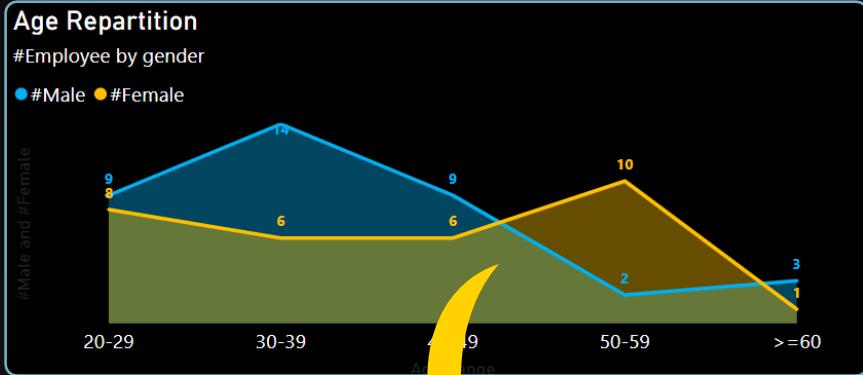
3

Creativity Give impact to your story



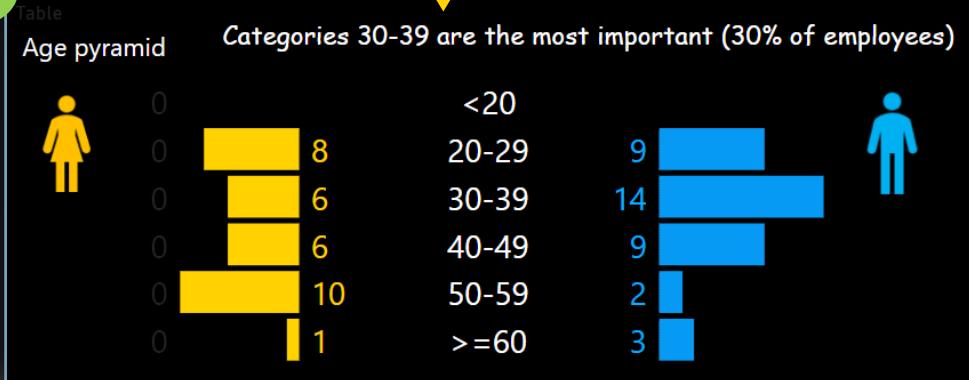
3.3 Best practices Choose the right chart

Why not?



Better

Bar chart is better for categories and line chart is better for time data.



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

3

Creativity Give impact to your story



3.3 Best practices Optimize chart

Why not?

Better

Donut chart are more airy than Pie chart.

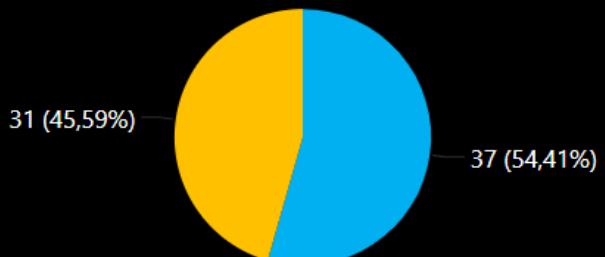


Place a KPI in the middle like a total, this gives more impact, and add a commentar to resume situation

Age Repartition

#Employee by gender

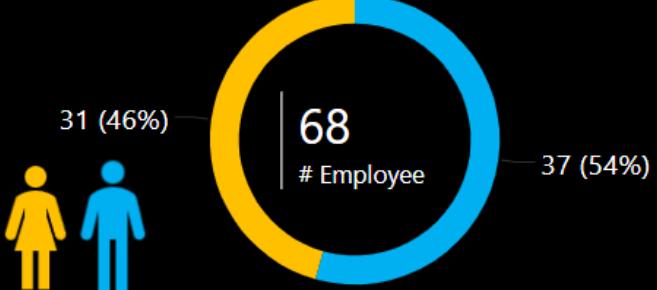
● #Male ● #Female



Age Repartition

2023 | #Employee by gender

Women represent 46% of the employees



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

3

Creativity Give impact to your story



3.3 Best practices

Declutter the X and Y axes

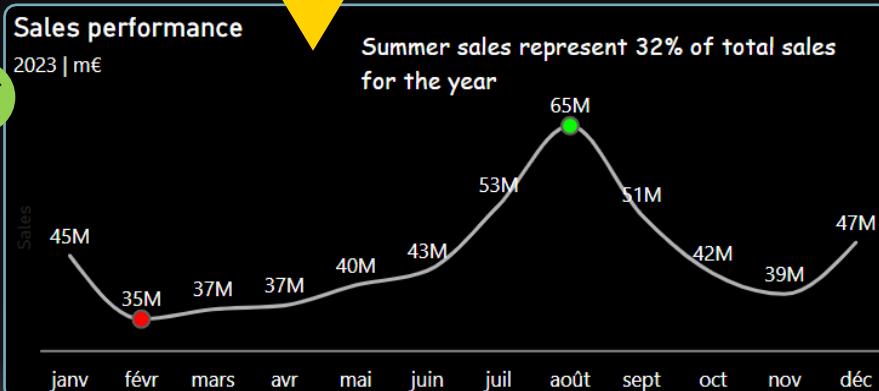
Why not?

Better

No need to have a lot of information, declutter the X and Y axes, it's important to do it!



Indicate min and max value (red and green markers), add a fine line for the X axe and a commentar to resume situation.



Start with PowerBI

"From Rookie to Rock"

Step 5, Storytelling

3

Creativity

Give impact to your story



3.3 Best practices

Which information is important?

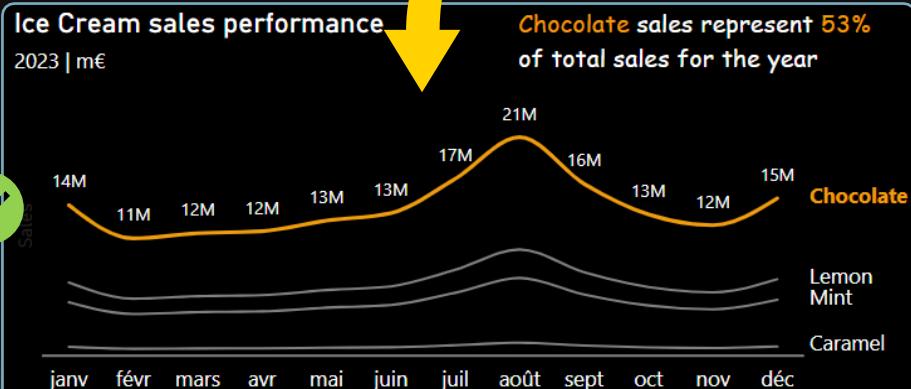
Why not?

Better

Show the most
important
information.



In this case study,
"Chocolate Ice
Cream" represents
more than 50% of
total sales!



Start with PowerBI

"From Rookie to Rock"

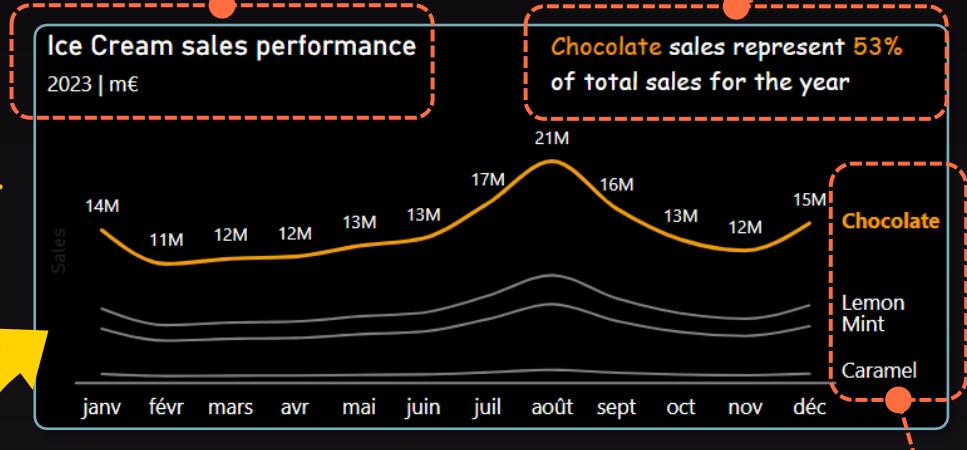
Step 5, Storytelling



3.3 Best practices

Anatomy of a Storytelling

Title & sub-title



Summarize the situation, just facts, no interpretation!

No Y axis, but still leave a thin line for the base (here just above the months)

Avoid legends, write them directly on the graph!



Font: Try to use 1 or 2 fonts maximum and 3 different font sizes maximum.

Start with PowerBI

"From Rookie to Rock"

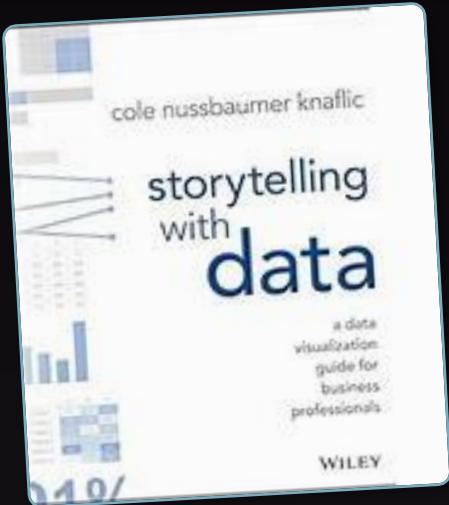
Step 5, Storytelling

4

Ressources



Book



**Storytelling with data
(Cole Nussbaumer
Knaflic)**

If you could only have one book, this would definitely be it!

Start with PowerBI

"From Rookie to Rock"

Images Bank

<https://unsplash.com/>
<https://www.pexels.com/>
<https://pixabay.com/>
<https://burst.shopify.com/>

Icones

<https://www.flaticon.com/>
<https://fr.freepik.com/>
<https://icons8.com/>

PowerPoint templates

<https://www.slidor.fr/en/ressources-powerpoint-gratuites>
<https://slidemodel.com/free-powerpoint-templates/>
<https://slideshop.com/>
<https://www.slideteam.net/>
<https://elements.envato.com/fr/>

Colors

<http://www.cercle-chromatique.com/>
<https://color.adobe.com/fr/create/color-wheel/>

List from Enes Akdag (pvla.com)

Step 5, Storytelling

To go further...



6 great ressources!



Cole Nussbaumer Knaflic • 2e
CEO, storytelling with data
Milwaukee, WI

Expérience : storytelling with data, Google et 3 au

6 relations en commun



Jasmin Simader • 2e
BI Analyst & Data Viz Expert (PBI & Qlik Sense) | #gerneper Linz-Wels-Steyr Area

4 k abonnés
29 relations en commun

[Message](#) [Voir le profil complet](#)



Enes Akdag • 1er
Senior Consultant
Greater Paris Metropolitan Region

Expérience : P-Val by Circle Strategy, P-Val Conseil et 1 au

4 relations en commun

[Message](#) [Voir le profil complet](#)



Bas Dohmen • 2e
Join my next Power BI Transformation FEBRU, Willich

66 k abonnés
48 relations en commun



Armand van Amersfoort • 1
Microsoft MVP ★ Owner DEXS.studio ★ Dash Hengelo

34 k abonnés
71 relations en commun



carlos barboza • 2e
data & decision
Peru

21 k abonnés
3 relations en commun

[Message](#) [Voir le profil complet](#)

Start with PowerBI
"From Rookie to Rock"

Step 5, Storytelling

Don't forget!

This isn't the truth, it's just my truth!

Patou Tips



Follow me
Like me
Share me

