Trainer Instructions

Day 4 – AM session on Key Dashboarding Principles in Power BI

1. Present [lecture](https://github.com/LaFosseAcademy/curriculum-3.0/blob/Data/weeks-6-7/Data/Day4_AM_KeyDashboardingPrinciples.slides.md). See notes for further guidance. Lecture includes a group activity, evaluating what works and doesn’t work on 3 different dashboards.
2. Open Demo Report (customerproductsOrders\_Clean\_withreports.pbix) in Power BI Desktop. Show the learners the **Revenue-Unformatted** dashboard and let them call out ways in which it could be improved based on the dashboarding principles they just learned. The following are examples of how the unformatted dashboard could be made more coherent, effective and professional:
   1. Double up on white space
   2. making the sizes of the visualisations more uniform,
   3. making sure the visuals are all readable (e.g. cannot see full title for Total Revenue by Country graph),
   4. putting the most important visuals in the upper left and getting more detailed as moved to bottom right corner,
   5. using a consistent and accessible colour theme.
3. Show the Revenue – Formatted dashboard. Note the following changes.
   1. The canvas size has been modified to 1200px by 1000px so it is vertical rather than horizontal and visuals showing product specific data have been moved off of this dashboard.
   2. The visuals are now very uniform sizes. The visuals on the right are all the same width and the visuals on the left are all the same width. The visuals are also lined up in terms of their height.
   3. There is also a clear header for the report in the upper left where viewers are most likely to look first and the KPI card is also on the top so that key measure is one of the first things viewers see. Because the slicer is near the top, it is very visible as well. The most detailed visual (the table) is in the bottom right corner.
   4. The colour theme does not distract from the data and is accessible, for example to colour blind dashboard users.
   5. Since the product information has been moved to a separate page of the report (report equals multi-page dashboard), a button has been added to let users navigate to the product page.
4. Demonstrate how the **Product Report** button brings users to the new product page of the report. (Hold down CTRL while clicking on the button to use it and note that you can just click on the button without CTRL on the published report).
5. Note that the *background colour* for the product report is pleasant but not distracting, the visualisations are again *uniform in colour and size* with plenty of evenly distributed *white space* around the visuals, and these visuals all *fit the product topic* of the page. Demonstrate that the revenue report button (ctrl+click) will take you back to the previous page.
6. On the *Revenue – Formatted* dashboard **demonstrate one way to add a navigation button**.
   1. Insert > Buttons > Blank
   2. Click and drag the “…” to move the button to the right of the existing product report button.
   3. Resize by clicking and dragging corner handles for button.
   4. In the **Format Button** panel to the right of the screen, switch from Button settings to **General** settings.
   5. Expand **Effects** and toggle **Background** on.
   6. Now, in the format button panel, switch from General settings to **Button** settings. Under **Button**, expand **Shape** options.
      1. Change rounded corners to 43px and demonstrate that there are multiple options for the shape of the button.
      2. Expand **Style** and toggle **Text** On. In the Text options, write Revenue-Unformatted in the Text field to give the button a label. Adjust text size for readability.
      3. Scroll down and Toggle **Action** on.
      4. Change the Action **Type** to *Page navigation*.
      5. Set the action **Destination** to the *Revenue-Unformatted* page.
7. Test that the newly added button works (CTRL-Click).
8. Encourage learners to practice add buttons to their dashboards.
9. Give learners remainder of session to practice applying these principles to two or more projects that we have previously worked on, e.g. bookshop and titanic data.