Dynamic Assumption Scenario Testing - Training Document

Dynamic Assumption Scenario Testing - Design Guidelines for Graphics

Purpose:

This document provides detailed guidelines for creating visual outputs (charts, tables, and dashboards) to ensure consistency, clarity, and alignment with FP&A reporting standards.

General Design Principles:

1. Use a consistent color scheme with navy blue as the primary color for all graphical elements.

2. Ensure all numerical values are displayed in dollar signs (e.g., $100,000) for easy interpretation.

3. Use legible fonts and labels, avoiding overly decorative or complex designs.

4. Ensure that graphics are easily exportable and compatible with presentation tools (e.g., PowerPoint, PDFs).

Specific Guidelines for Graphics:

1. Bar Charts:

   - Primary Color: Navy blue (#001F54) for bars.

   - Label Placement: Display exact values above each bar with dollar signs (e.g., '$1,200,000').

   - Axis Labels: Include clear labels for both axes (e.g., 'Months' for x-axis, 'Revenue ($)' for y-axis).

   - Gridlines: Use light gray gridlines for better readability, avoid clutter.

2. Line Charts:

   - Line Color: Navy blue for primary trends, lighter shades for secondary lines.

   - Data Points: Mark key data points with navy blue circles, and annotate with values (e.g., '$350,000').

  - Legends: Place legends outside the chart area for a clean look.

3. Tables:

  - Column and Row Colors: Alternate light gray shading for rows for better readability.

  - Headers: Navy blue background with white text for table headers.

  - Numbers: All financial figures in dollar signs and right-aligned for clarity.

4. Pie Charts:

  - Segment Colors: Use navy blue for the largest segment, and complementary lighter shades for others.

  - Labels: Display segment values as percentages with the corresponding dollar amount (e.g., '35% ($450,000)').

  - Avoid Excessive Segments: Limit to 5-6 key categories for simplicity.

5. Dashboards:

  - Layout: Organize data in logical sections (e.g., Revenue, Costs, KPIs).

  - Headings: Navy blue bold text for section titles.

  - KPIs: Highlight key metrics in navy blue boxes with white text (e.g., 'Revenue: $2,500,000').

  - Icons: Use minimal icons in navy blue to emphasize data points (e.g., arrows for trends).

Guidelines for Dollar Formatting:

- Always use '$' before numerical values (e.g., '$1,200,000').

- Use commas for thousands separators.

- Round to the nearest thousand unless precision is required (e.g., '$1.2M').

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Export Recommendations:

- Preferred Formats: PNG for charts, XLSX or CSV for tables, and PDF for comprehensive reports.

- Resolution: Ensure charts have high resolution (300 DPI or higher) for professional use.

Example Use Case:

- Input: 'Generate a bar chart showing monthly revenue in navy blue with dollar amounts.'

  Output: A clean, navy-blue bar chart with monthly revenue labeled in dollar amounts above each bar.

End of Document.