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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

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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

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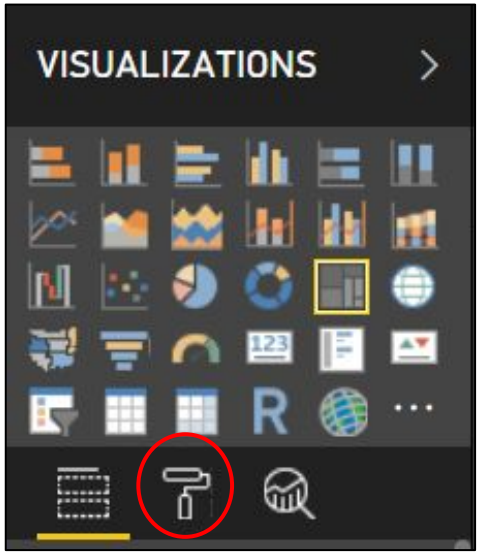


Dependencies

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.

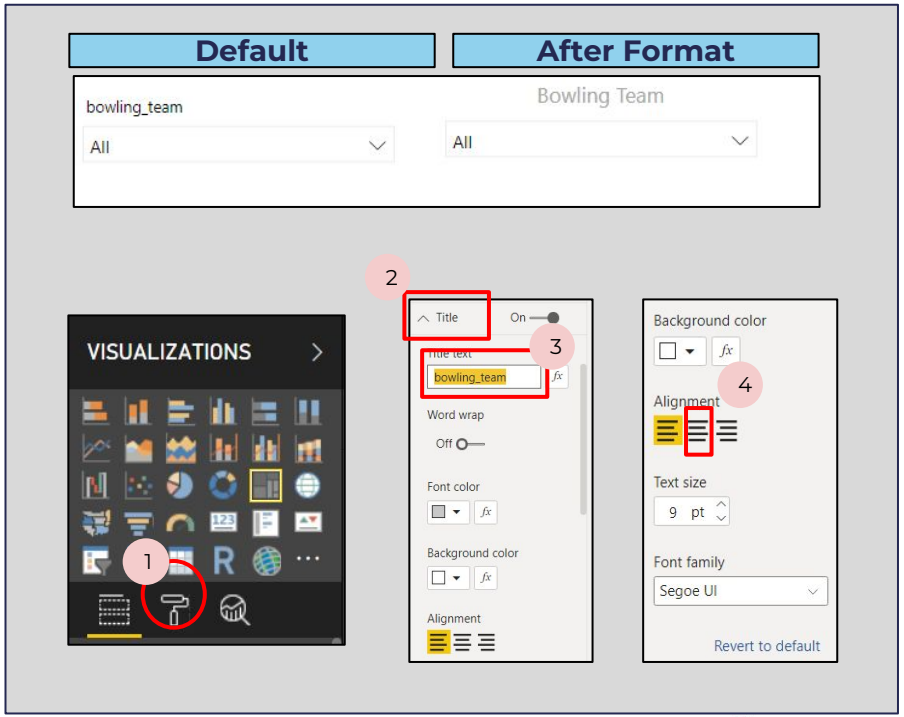
The font size and position of the heading might need to be customised. We, therefore, need to **format the title** to:

- 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.



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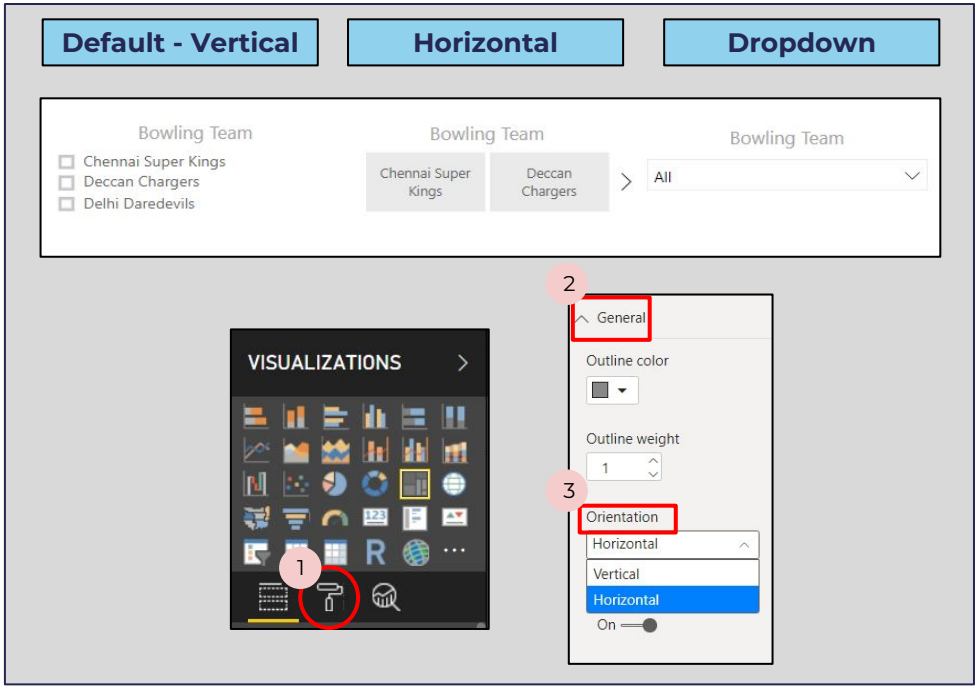
Formatting Visuals - Filters

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

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Formatting Visuals - Filters

There are three types of Filters:

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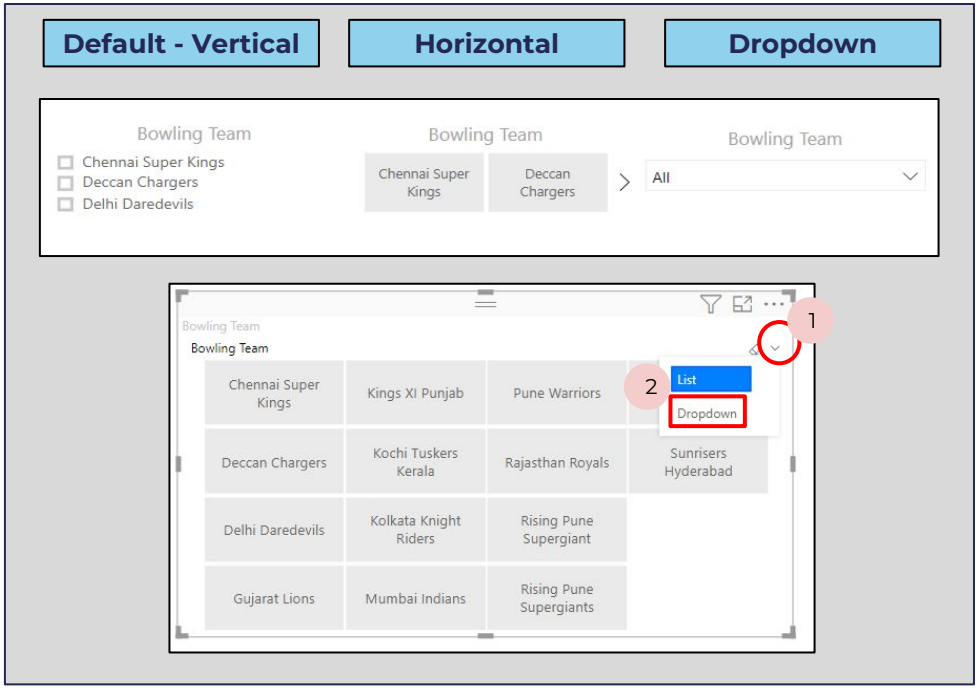
- **Dropdown** - dropdown list of categories with checkboxes next to them



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

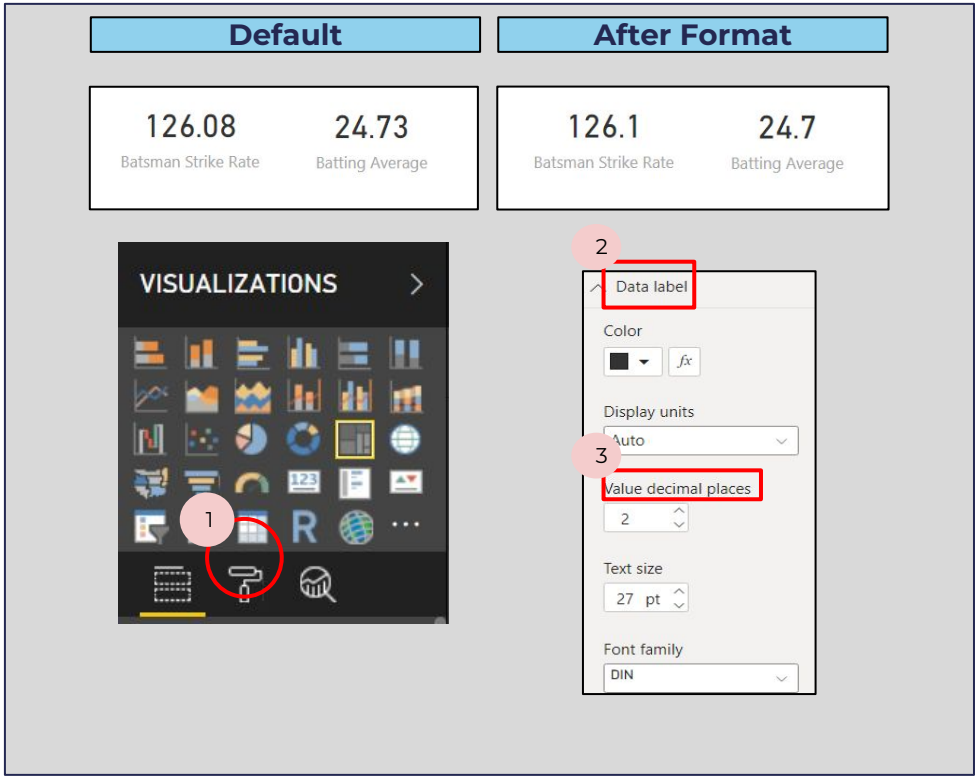
Numbers can appear in cards, tables or graphs. Some numbers have many decimals, which can take up space and also be difficult to read.

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



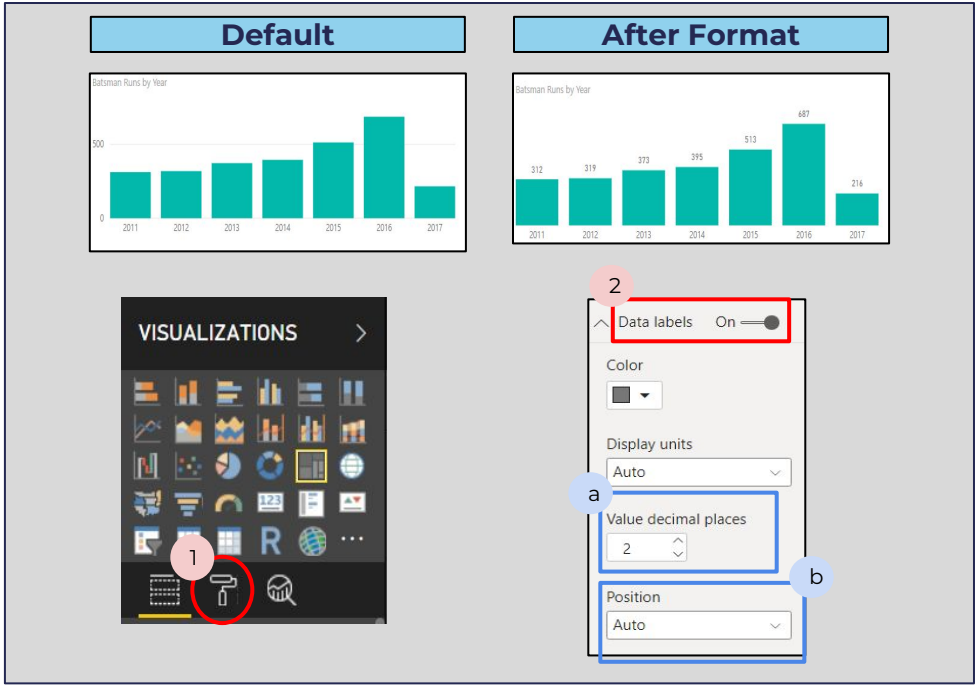
Formatting Visuals - Labels

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

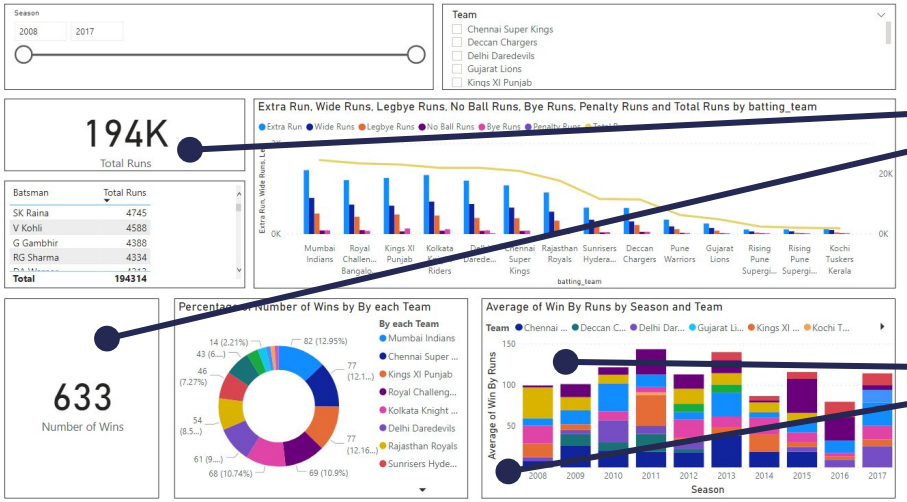
DOs	DON'Ts
Keep your visuals relevant to the audience	Choose design over explanation
Group data logically	Overlay graphs
Align and format	Overpopulate the page
Be wary of design elements (colour, size, saturation)	Change styling across pages

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

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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

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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

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Key dos and don'ts regarding dashboards

DON'Ts

Choose design over explanation

Don't add unnecessary data

In this case, the 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

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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!