

Criando Relatórios com Foco em Experiência do Usuário

Formação Power BI Analyst

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Mestre em modelagem computacional | Cientista de dados

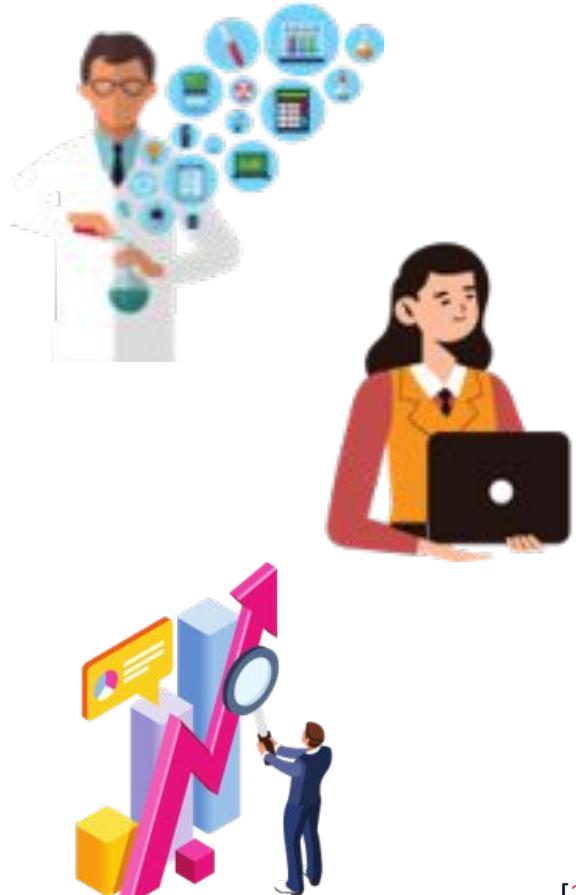
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Definindo Escopo de Requisito de Design

// Power BI Analyst

Meta & Escopo

- Quem quero alcançar?
- Qual tipo de relatório?
- Requisitos de interface
- Experiência do usuário



Meta & Escopo

CONTOSO SKATEBOARD STORE

SALES **RETURNS**

Sales \$208,847 ✓ Previous 7 days: \$172,815 (+20.85%)

Sales over time

Sales by Product

Product	Sales
PowerPoint	\$46M
Power BI	\$35M
Excel	\$27M
XBOX	\$18M
PowerApps	\$17M
Teams	\$14M

Returns \$3,719 ✓ Previous 7 days: \$33,299 (-88.83%)

Customer returns \$2,673 ✓ Previous 7 days: \$22,997 (-88.38%)

Inventory on hand 1,706 ✓ Avg daily consumption: 1,426 (+19.6%)

Inventory turnover ratio 97% ✓ Minimum goal: 80 (+20.78%)

CONTOSO SKATEBOARD STORE

Select City All

Sales \$208,847 ✓ Previous 7 days: \$172,815 (+20.85%)

Customer sales \$156,046 ✓ Previous 7 days: \$115,686 (+34.89%)

Contoso sales \$88,211 ✓ Previous 7 days: \$41,125 (+114.49%)

Returns \$3,719 ✓ Previous 7 days: \$33,299 (-88.83%)

Customer returns \$2,673 ✓ Previous 7 days: \$22,997 (-88.38%)

Items sold 5,909 ✓ Previous 7 days: 2,580 (+129.03%)

Sales by Store

Sales over time

City **Price** **Sales** **Units sold** **05-WIF Forecast** **05-Warehouse\$** **On hand** **Inventory turnover ratio** **Days sales of inventory**

City	Price	Sales	Units sold	05-WIF Forecast	05-Warehouse\$	On hand	Inventory turnover ratio	Days sales of inventory
Los Angeles, CA, USA	\$3,062,400	\$20,531,526	44	\$498,680	1,562,379.00	32	100% ★	97% ★
Power BI	\$816,000	\$4,296,070	2	\$132,090	350,795.00	2	100% ★	99% ★
Excel	\$480,000	\$3,475,600	0	\$83,050	176,500.00	0	100% ★	99% ★
PowerPoint	\$768,000	\$5,730,240	0	\$87,680	112,240.00	0	100% ★	99% ★
Teams	\$266,800	\$1,681,404	42	\$46,648	147,000.00	30	100% ★	99% ★
PowerApps	\$345,600	\$2,325,492	0	\$76,572	254,124.00	0	100% ★	99% ★
XBOX	\$384,000	\$3,014,640	0	\$72,640	521,720.00	0	100% ★	99% ★
Total	\$21,436,800	\$156,922,431	624	\$3,601,869	15,346,908.00	1,706	97% ★	97% ★



Requisitos Necessários

- Exibição padrão de seus dados e lógica de negócios
- Fonte única da verdade



Entregar dados atualizados

- Vendas: 24 horas
- Inventário: 1 hora



Requisitos Necessários

- Disponibilidade de dados
- Relatórios naturais e amigáveis
- Fornecendo novos insights
- Padrão de marca corporativa



Público-alvo

- Influencia e impacta no relatório final

Tomador de decisão

Perfil de consumidor:

- Executivo
- Analista
- Operador de informações

Metas e Processos

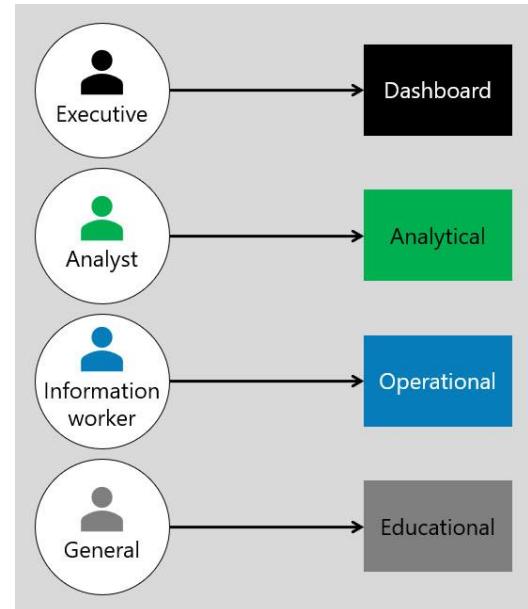
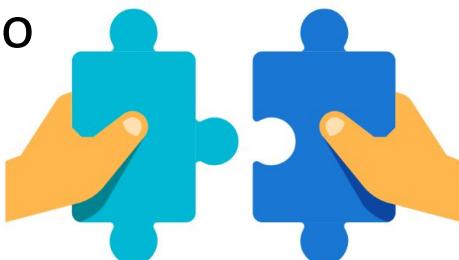
Auxilia em tomadas de decisão



Público-alvo

Tipos de relatório

- Painel
- Analítico
- Operacional
- Formação educacional



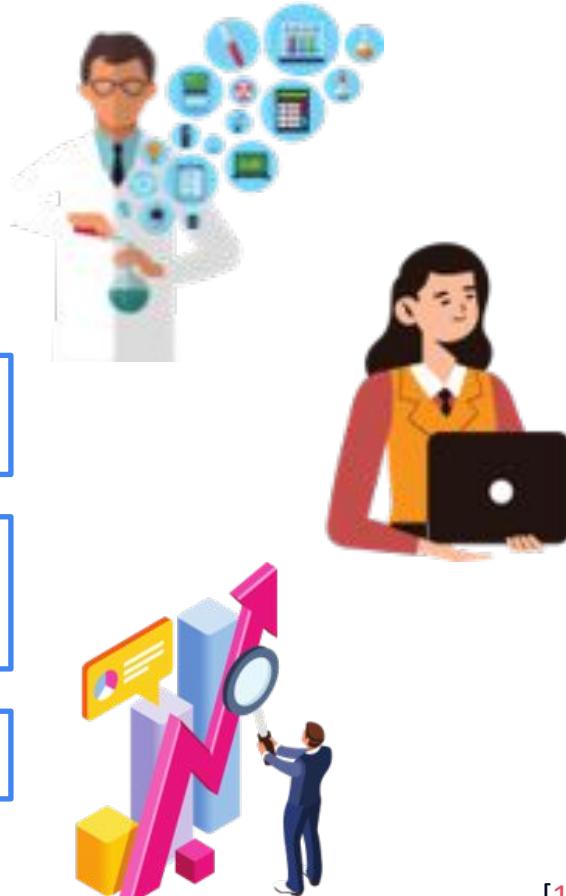
Requisitos de UX

Tipos de relatórios e Perfil de Usuário

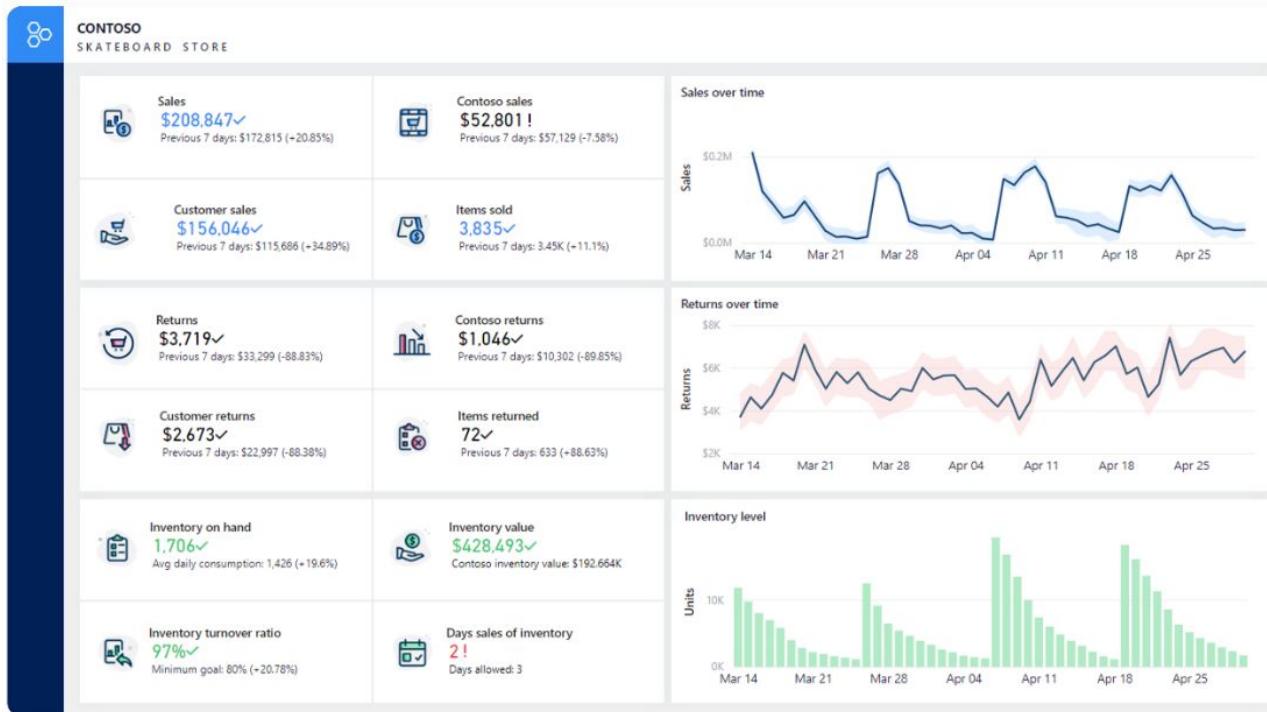
// Power BI Analyst

Painel

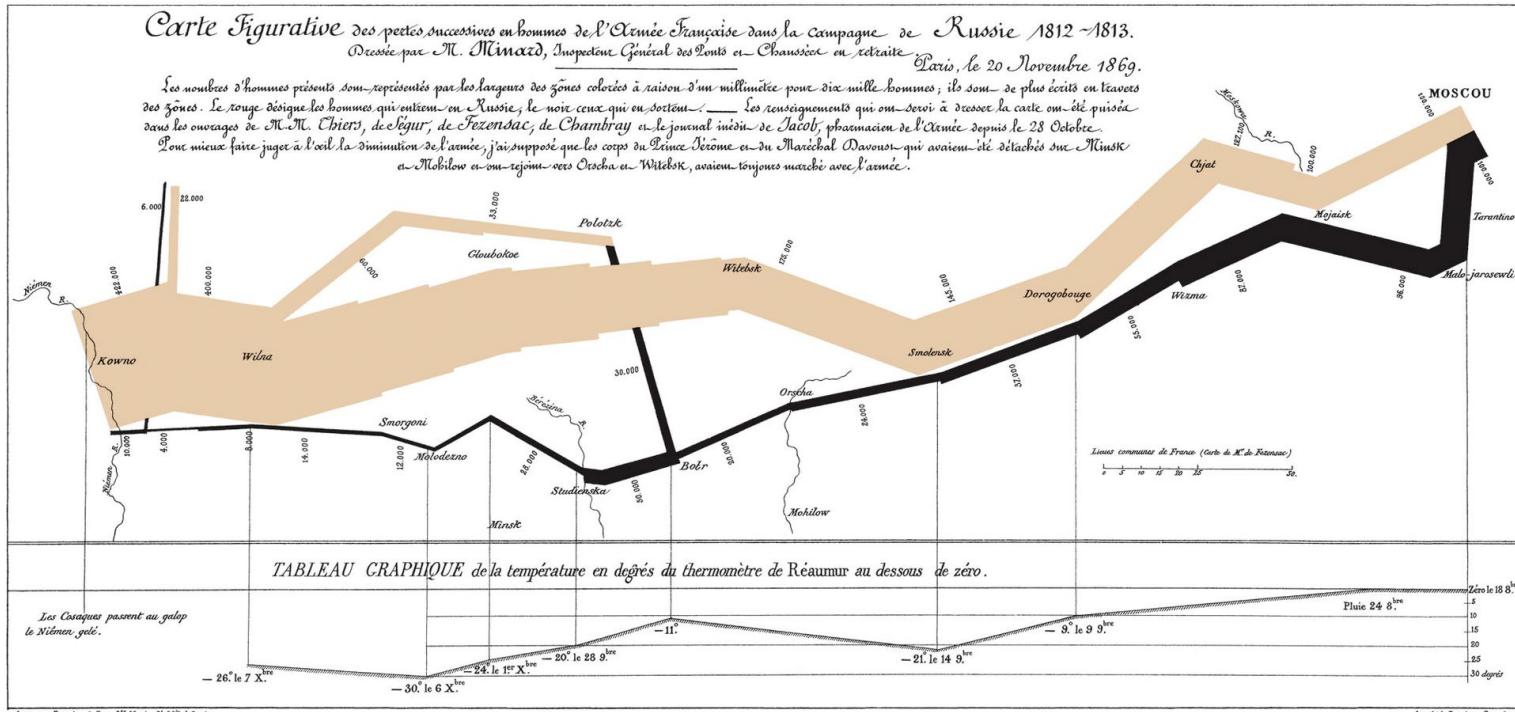
- Meta**
 - Interpretar a história
 - Velocidade
- Características**
 - Autoexplicativos
 - Focado
 - Rotulados
- Objetivo**
 - Minimizar margem para interpretação



Painel

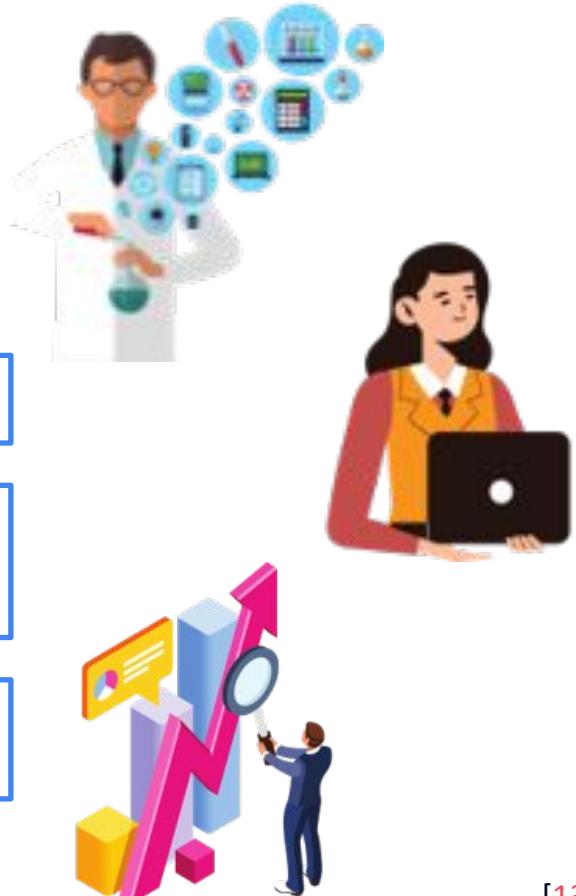


Dados temporais implícitos

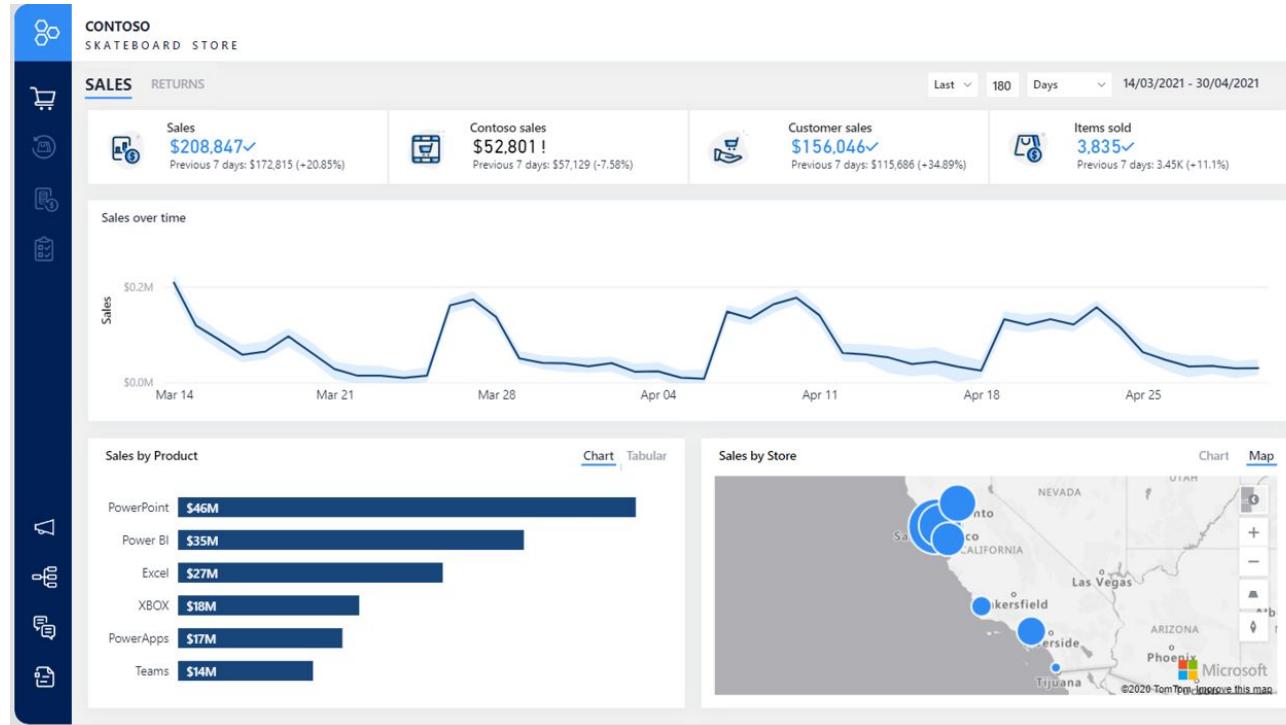


Relatórios Análíticos

- Meta**
 - Auxiliar a responder perguntas
- Características**
 - Mais comum
 - Atende diferentes casos
 - Segmentação de dados
- Objetivo**
 - Caminhos possíveis
 - Exploração de tópicos de interesse

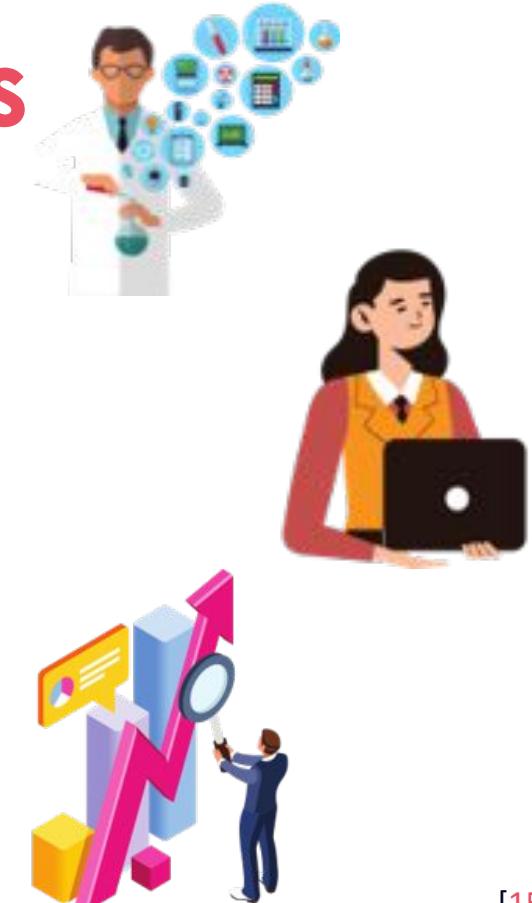


Relatório Analítico



Relatórios Operacionais

- Meta**
 - Monitoramento real time
- Características**
 - Monitoramento
 - Tomada de decisão
 - Navegabilidade
- Objetivo**
 - Minimizar recursos analíticos
 - Focar no operacional



Relatórios Operacionais

CONTOSO
SKATEBOARD STORE

Select City All

Sales \$327,852 Previous 7 days: \$126,091 (+160.01%)

Contoso sales \$88,211 Previous 7 days: \$41,125 (+114.49%)

Customer sales \$239,641 Previous 7 days: \$84,966 (+182.04%)

Items sold 5,909 Previous 7 days: 2,58K (+129.03%)

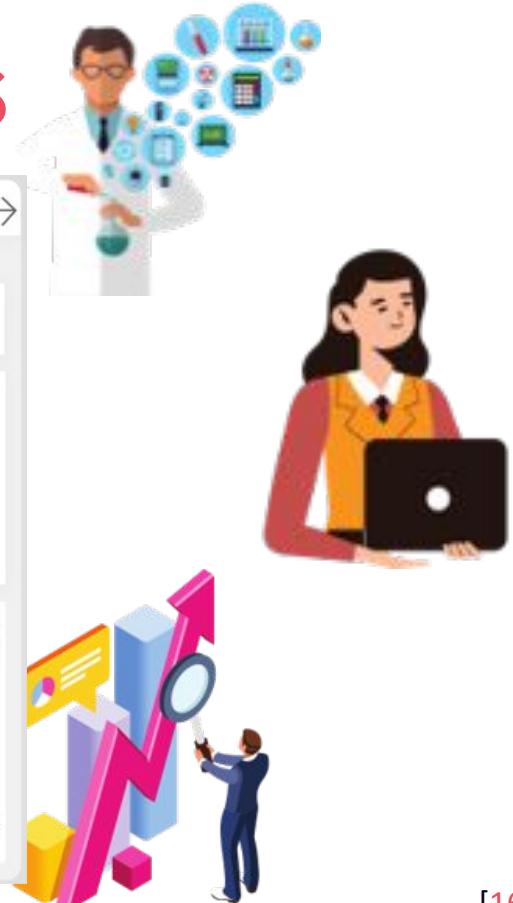
Sales by Store

Map

Sales over time

©2020 TomTom. Improve it.

City	Price	Sales	Units sold	05-WIF Forecast	05-Warehouse\$\$	On hand	Inventory turnover ratio	Days sales of inventory	Invoice
Los Angeles, CA, USA	\$3,062,400	\$20,531,526	44	\$498,680	1,562,379.00	32	100% ★	✓	✓
Power BI	\$816,000	\$4,296,070	2	\$132,090	350,795.00	2	100% ★	✓	✓
Excel	\$480,000	\$3,475,600	0	\$83,050	176,500.00	0	100% ★	⚠	✓
PowerPoint	\$768,000	\$5,738,240	0	\$87,680	112,240.00	0	100% ★	⚠	✓
Teams	\$268,800	\$1,681,484	42	\$46,648	147,000.00	30	99% ★	✓	✓
PowerApps	\$345,600	\$2,325,492	0	\$76,572	254,124.00	0	100% ★	⚠	✓
XBOX	\$384,000	\$3,014,640	0	\$72,640	521,720.00	0	100% ★	⚠	✓
Total	\$21,436,800	\$156,922,431	624	\$3,601,869	15,346,908.00	1,706	97% ★	✓	✓



Relatórios Educacionais



Meta

- Foco na narrativa e explicação

Características

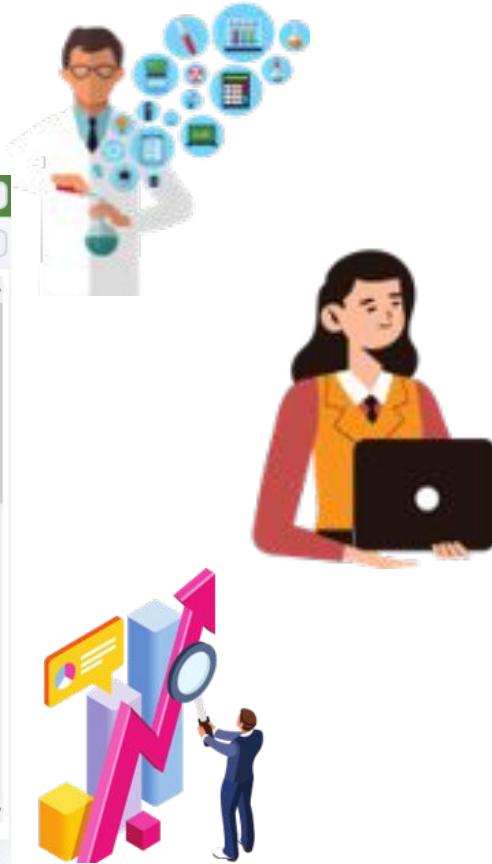
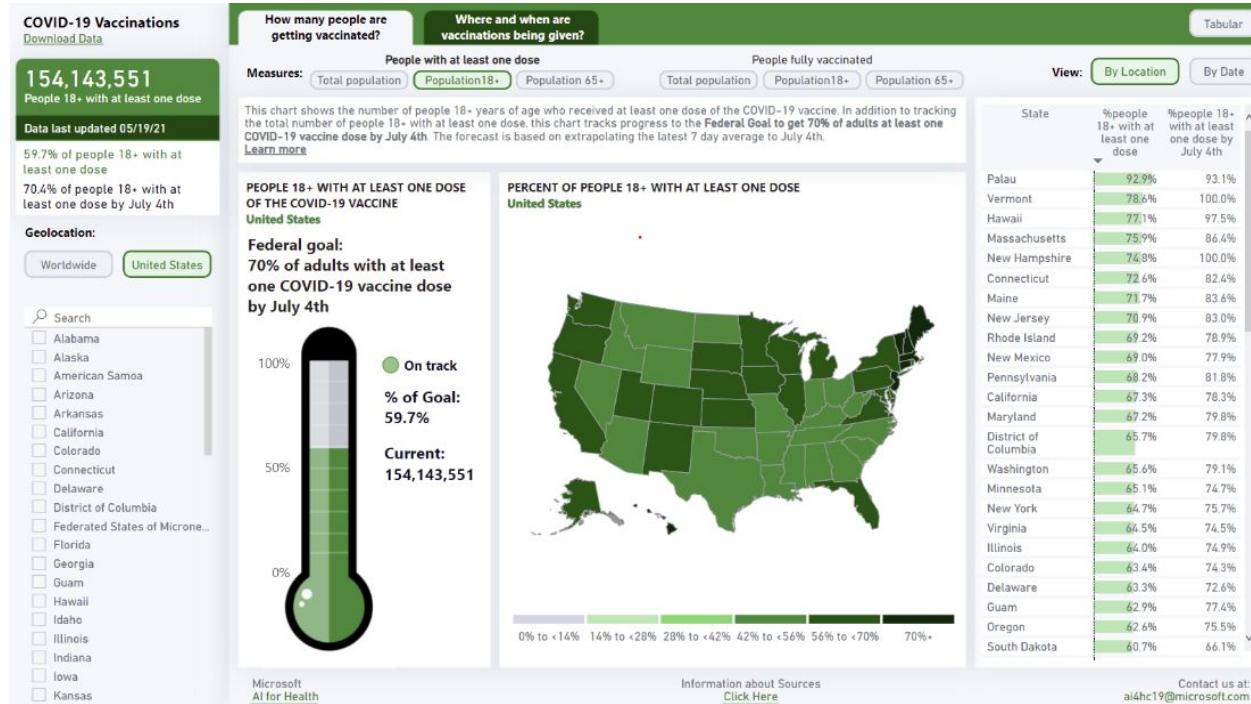
- Não há familiaridade com os dados
- Usado por jornais e governos

Objetivo

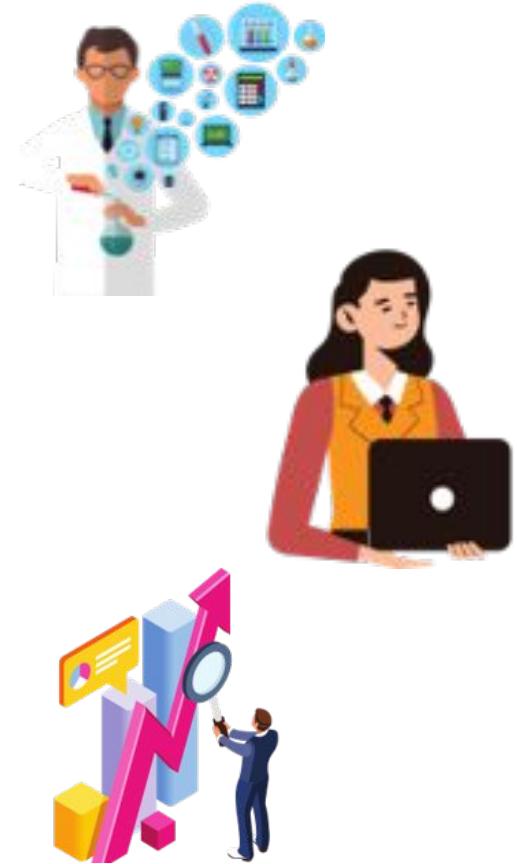
- Difusão da informação



Relatórios Educacionais



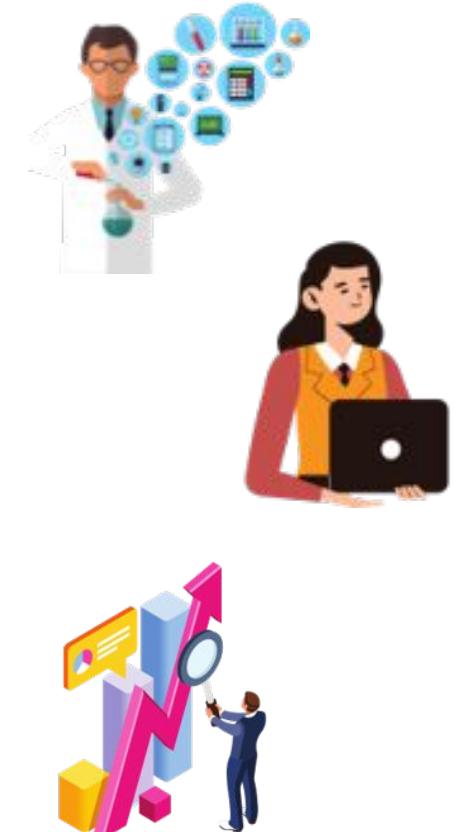
Requisitos do Usuário



Requisitos Necessários

No mínimo, o tema deve incluir os seguintes elementos:

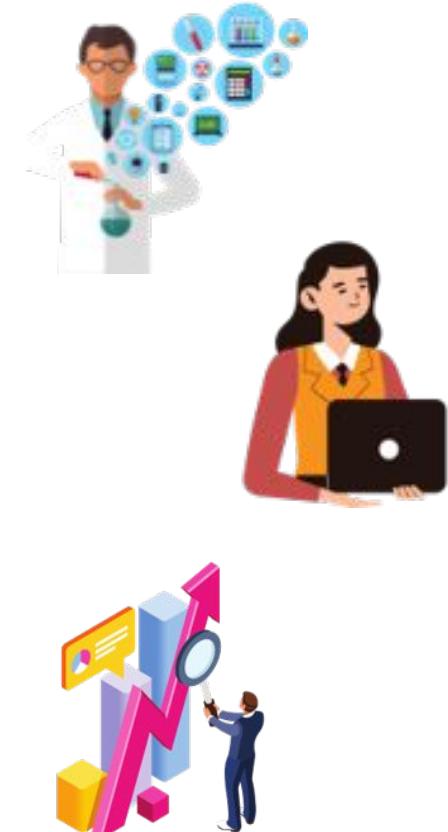
- Marca ou logotipo.
- Paleta de cores que se alinhe ou complementam a identidade visual organizacional.
- Configurações de texto, incluindo seleção de fonte, tamanhos e cor.



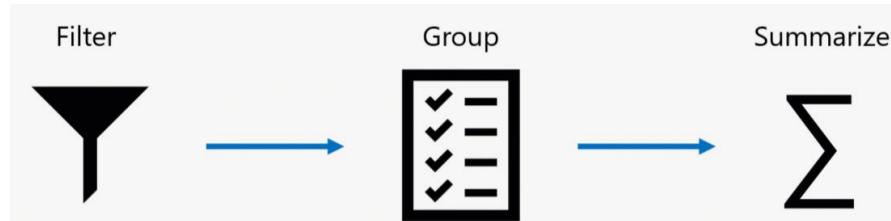
Acessibilidade

Para dar suporte a pessoas com pouca ou nenhuma visão, considere usar:

- fontes claras e grandes,
- visuais bem espaçados e grandes,
- cores suficientemente contrastantes,
- e navegação de relatório intuitiva que pode ser compreendida por leitores de teclado e tela.



Estrutura



Fases:

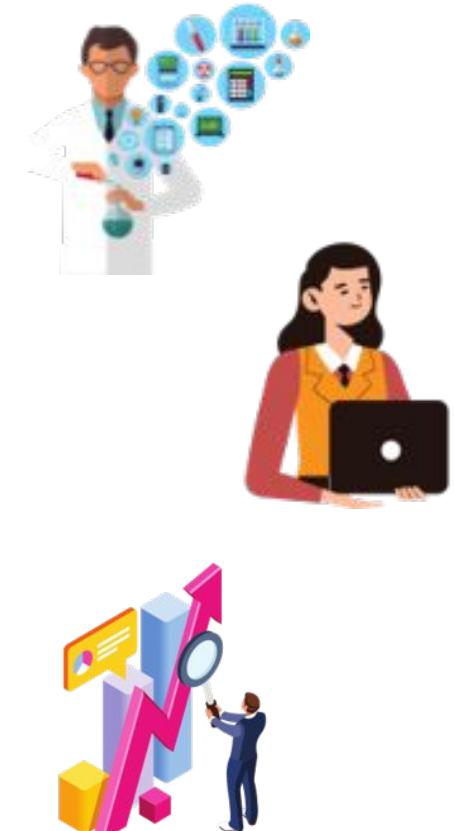
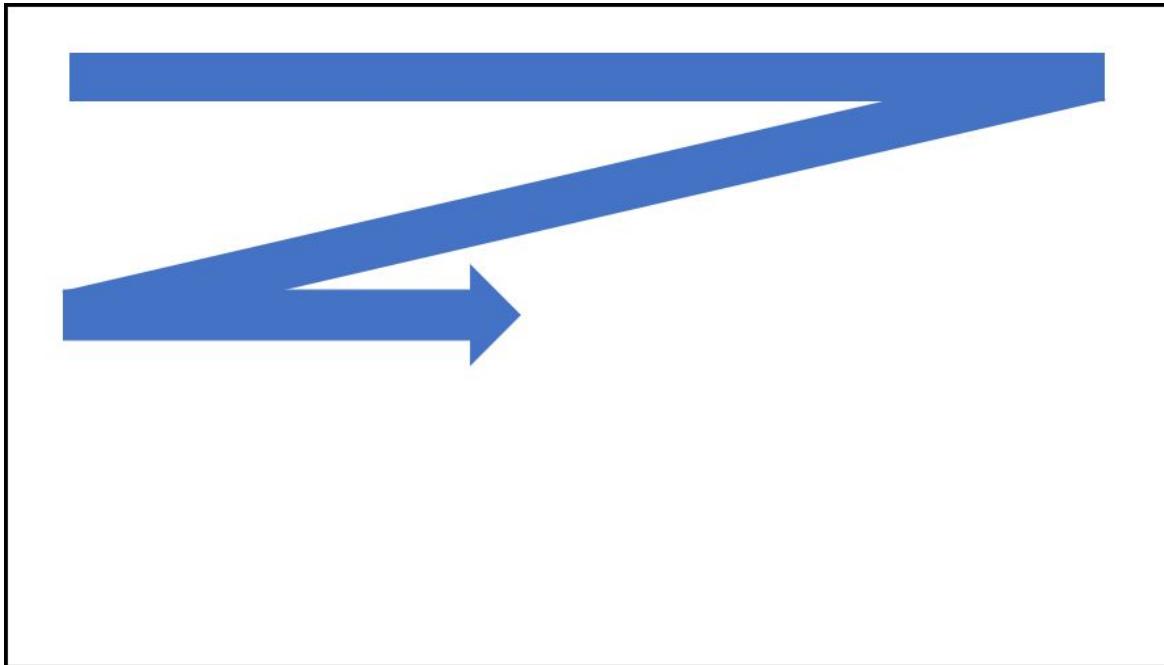
- Filtragem – Alvo de relevância
- Agrupamento – divide os resultados em grupos
- Resumo – Produz resultado de valor único



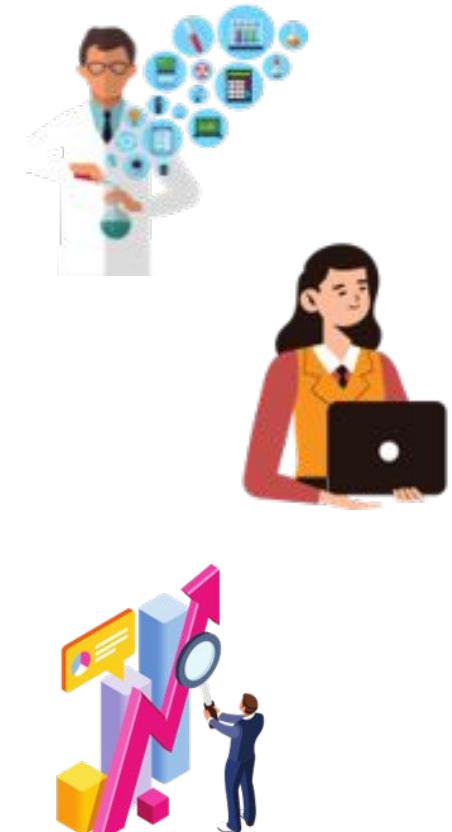
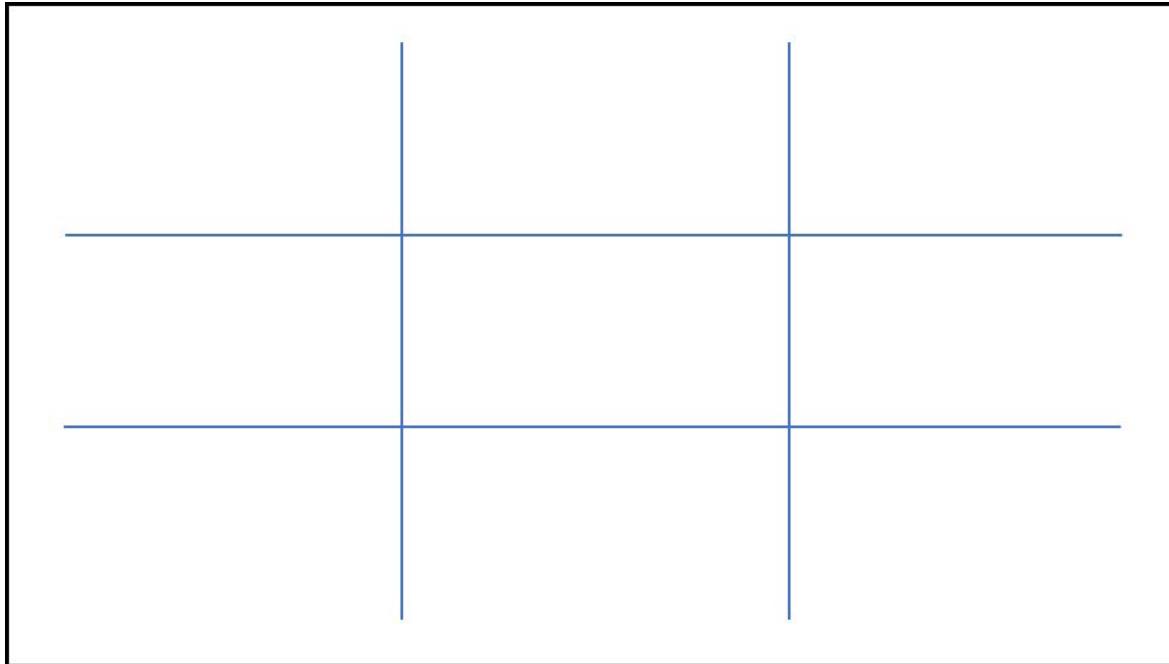
Estrutura e Boas Práticas

// Power BI Analyst

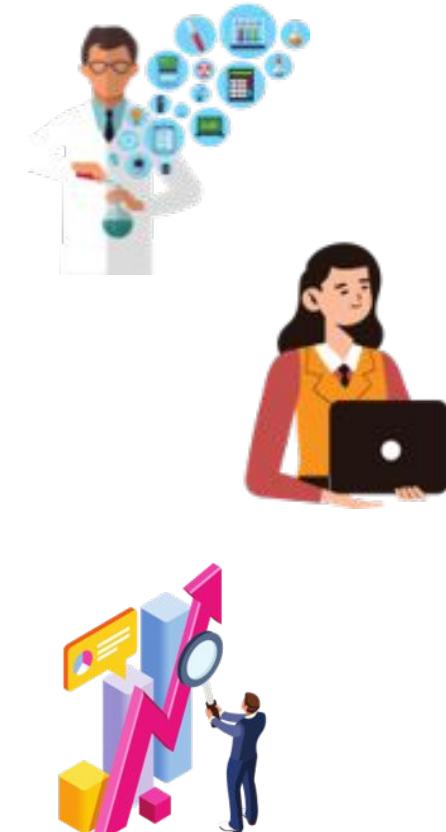
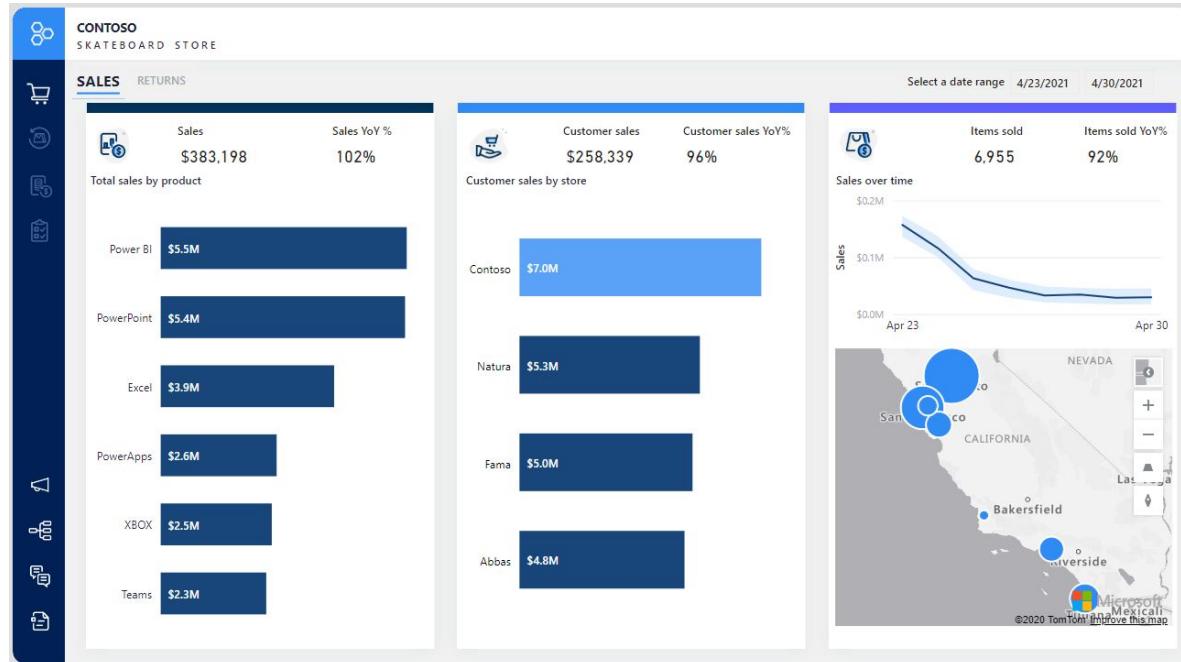
Posicionamiento



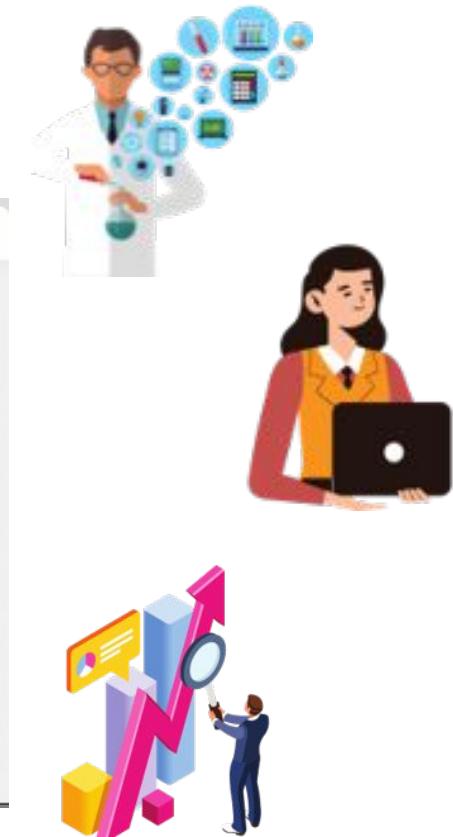
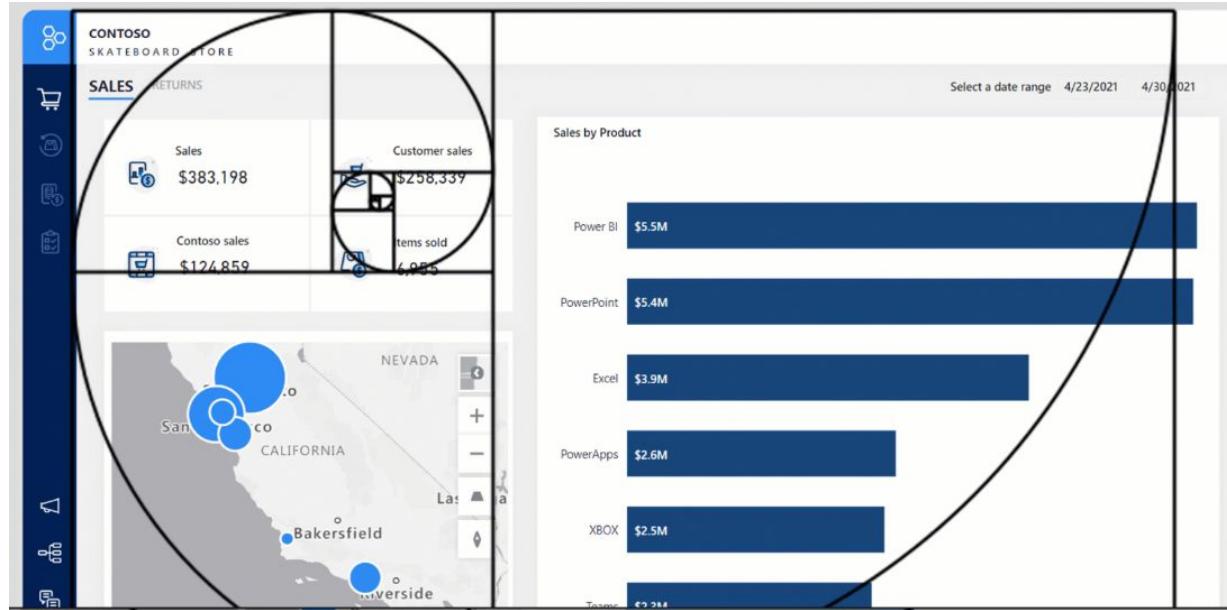
Posicionamiento



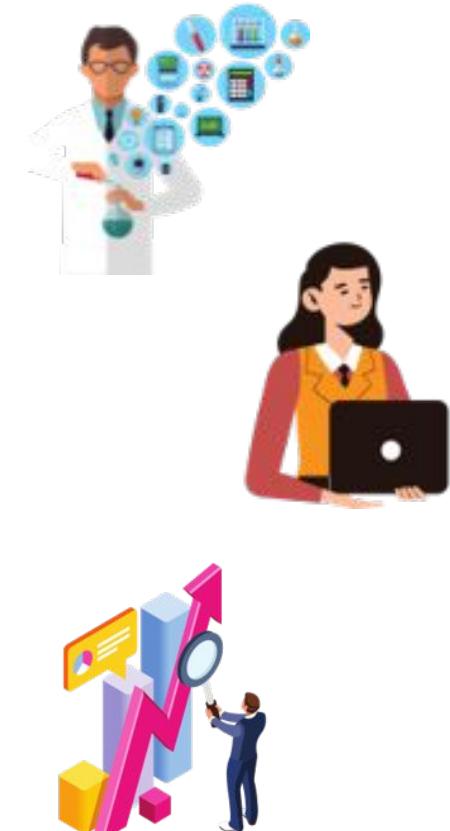
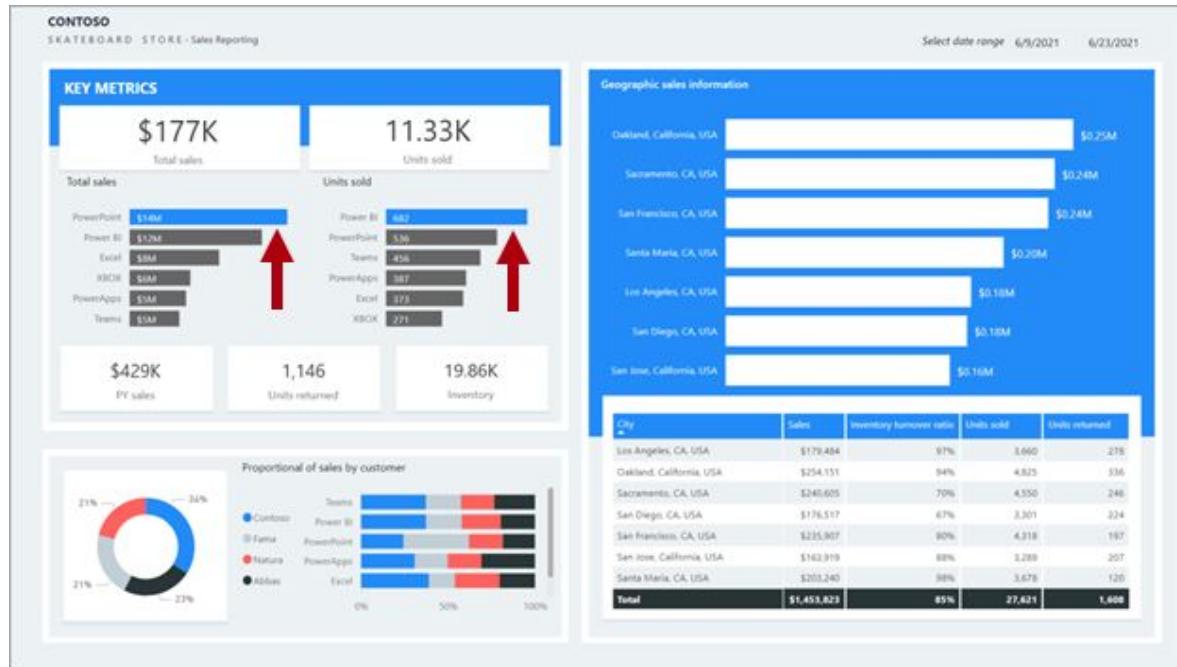
Posicionamiento



Posicionamiento

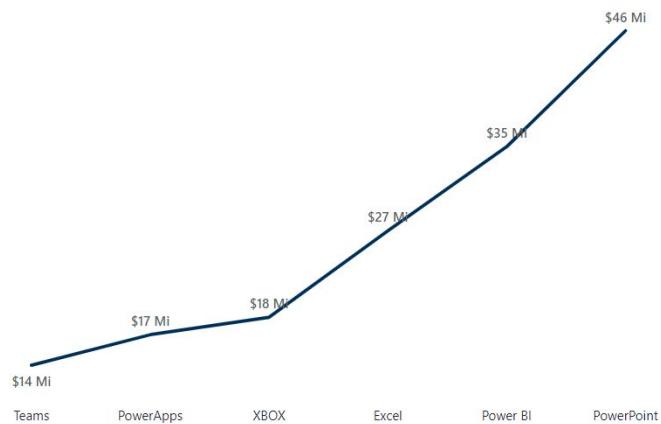


Posicionamiento

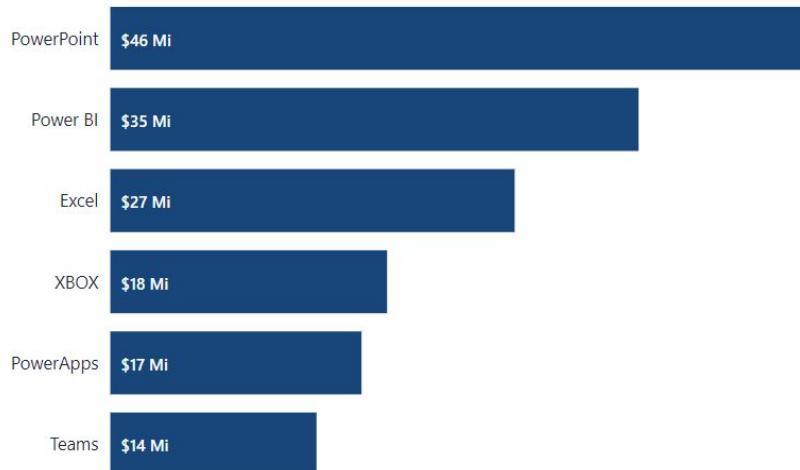


Boas Práticas

Bad practice - Categorical line

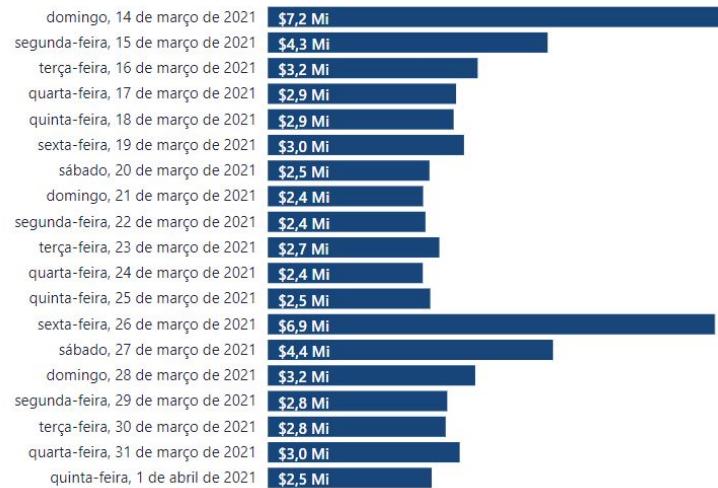


Good practice - Sales by product

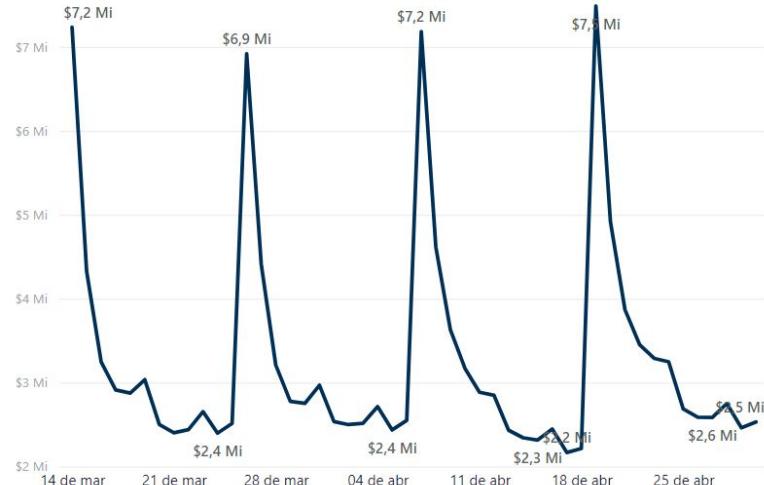


Boas Práticas

Bad practice - Sales over time

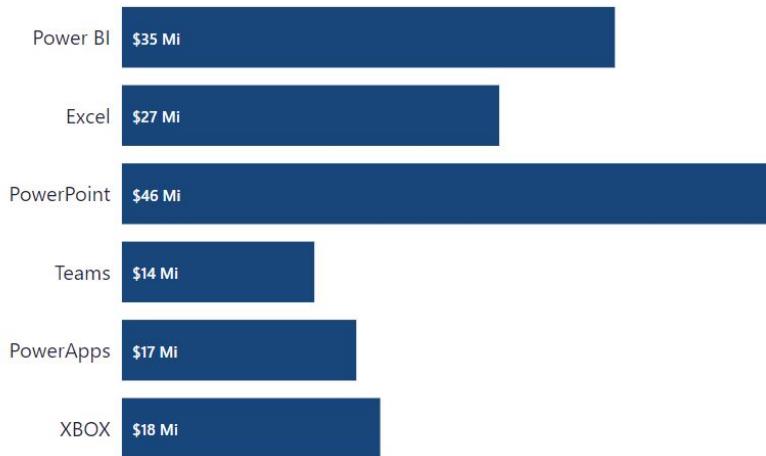


Good practice - Sales over time



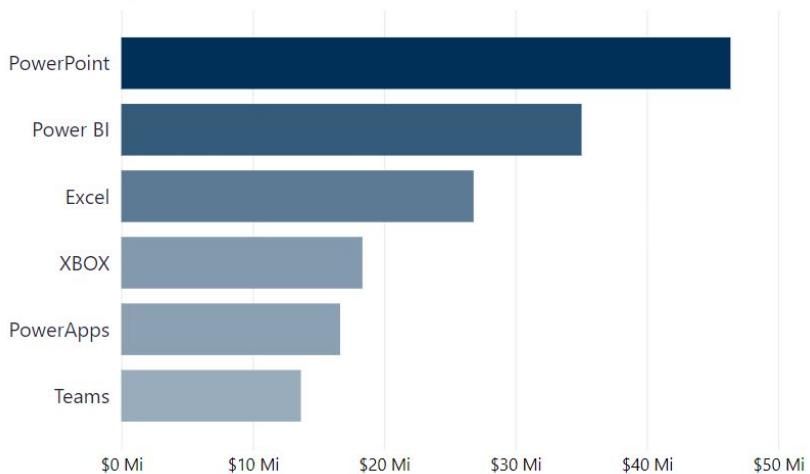
Boas Práticas

Bad practice - Sales by product



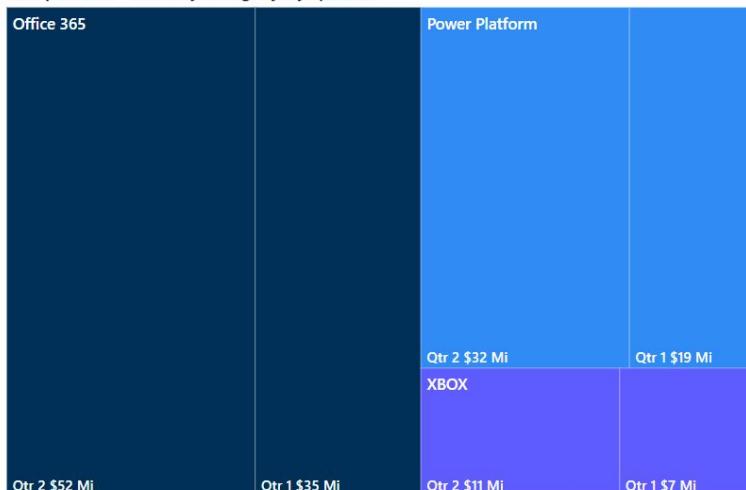
Good practice - Sales by product

Sales \$13,68 Mi \$46,37 Mi



Boas Práticas

Bad practice - Sales by category by quarter



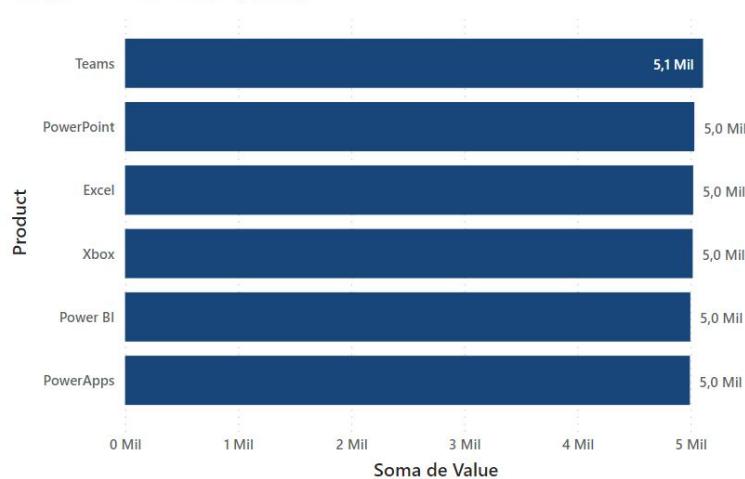
Good practice - Sales by category by quarter

● Qtr 1 ● Qtr 2



Boas Práticas

Bad practice - Total value by product



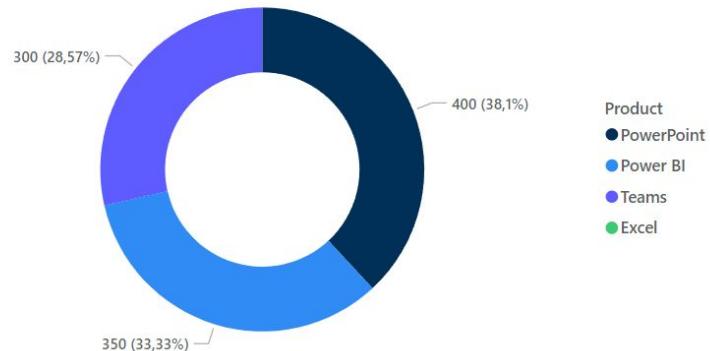
Good practice - Sum of value by product

Product	Soma de Value	Rank
Teams	5.112	1
PowerPoint	5.035	2
Excel	5.024	3
Xbox	5.020	4
Power BI	5.000	5
PowerApps	4.995	6



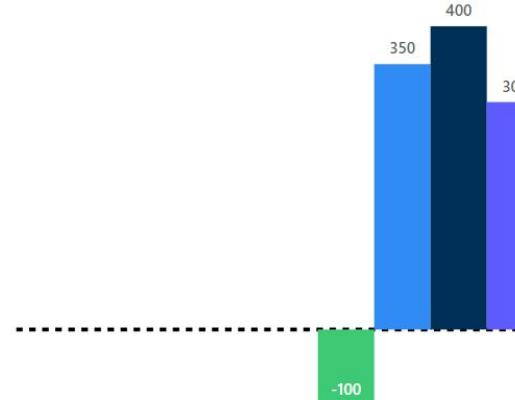
Boas Práticas

Bad practice - Units available by product



Good practice - Units available by Product

Product ● Excel ● Power BI ● PowerPoint ● Teams



Obrigada

// Como dominar a sua carreira em data