

Assignment Project Exam Help

Sandbox Project

<https://powcoder.com>

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Hannah Pe Benito, Customer Engineer

Goals of the Session

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- Case Study Introduction
- Strategic Thinking Process Framework to Report Development
- How to create compelling PBI report
- Q&A

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CASE STUDY

INTRODUCTION

Case study on HR Analytics

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The Great Resignation

Over the last two and a half years, the pandemic has changed how we think about work. Research by [Microsoft](#) and [McKinsey](#) highlight that today,

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Companies are struggling to address the problem, and many will continue to struggle for one simple reason: they don't really understand their employee base and why they are leaving.

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Rather than take the time to investigate their workforce traits as well as the true causes of attrition, many companies are jumping to well-intentioned quick fixes that fall flat.

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Sources: [Forbes](#), [McKinsey](#), [Microsoft](#)

Contoso

The Contoso Corporation is a multinational business with its headquarters in Paris. The company is a manufacturing, sales, and support organization with more than 100,000 products.

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Contoso's C-level executives are concerned of the risk of the "Great Resignation" trend, they have asked your help them to get an end-to-end visibility on their employee base and any attrition insight.

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The Deliverables

- A visual report of visualizations (Power BI report) that provide key insights in the dataset. Insights may include but not limited to headcount evolution over time, Job Positions, Male/Female Ratio, Full-Time vs Part-Time Ratio, Employees Age trends, Diversity and Inclusion trends as well as influencers of Attrition.

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- Presentation to communicate key findings to the C-Level executives at Contoso to address their concerns.

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Assumptions

Contoso's data engineers have provided you access to the semantic models that pulls the data from all their system.

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CASE STUDY

Head Count Data

Case study on HR Analytics

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STRATEGIC THINKING PROCESS

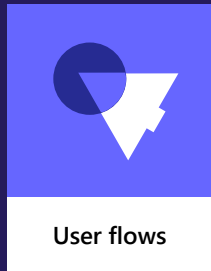
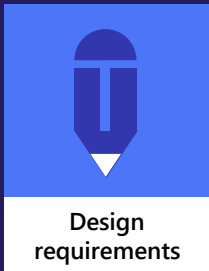
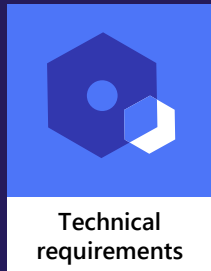
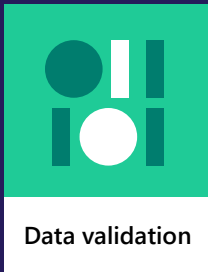
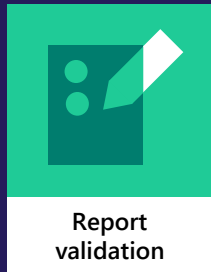
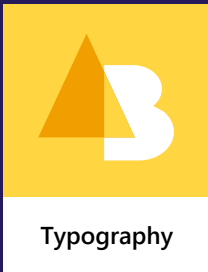
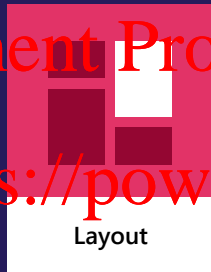
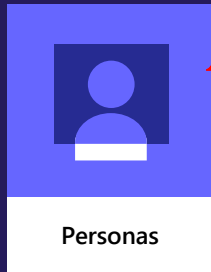
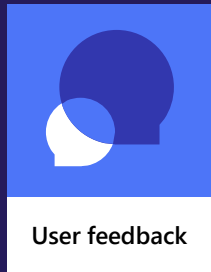
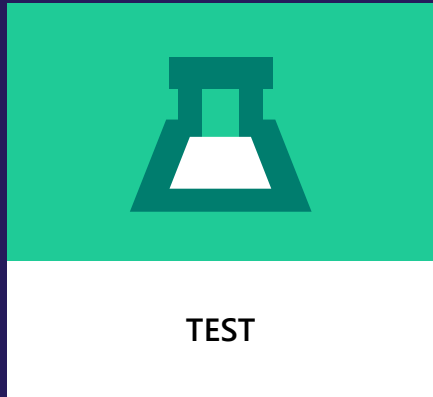
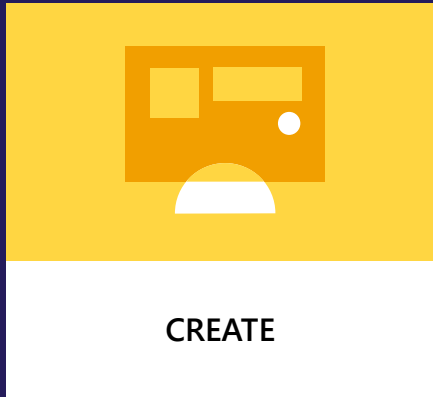
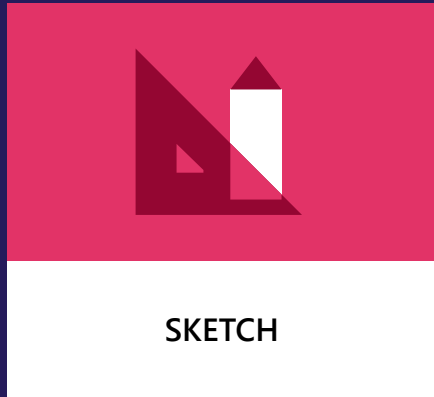
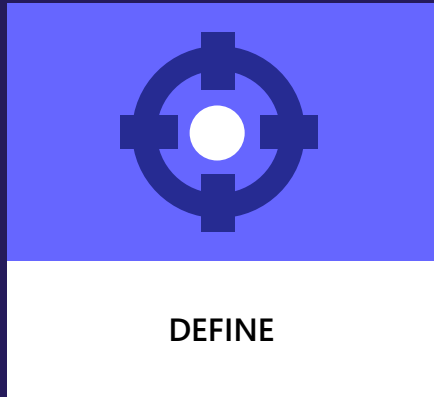
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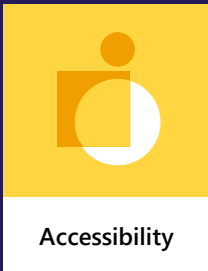
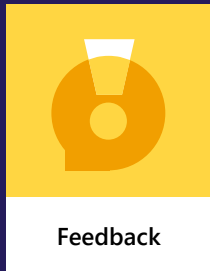
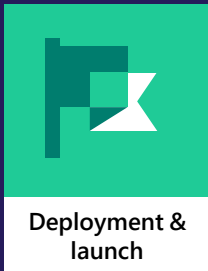
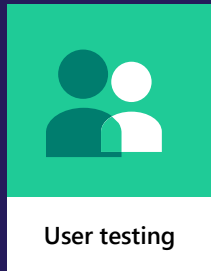
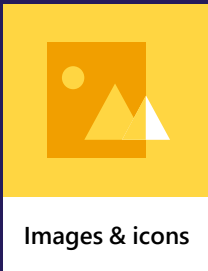
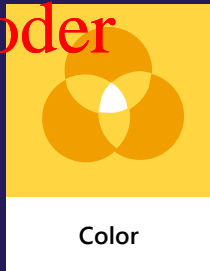
Report design in Power Bi

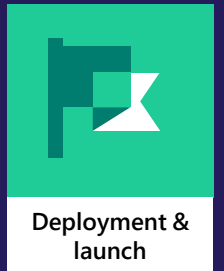
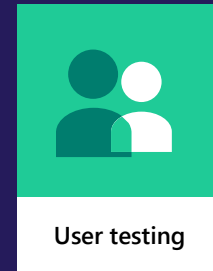
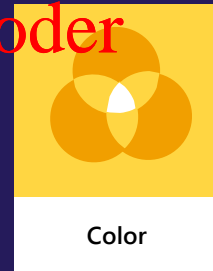
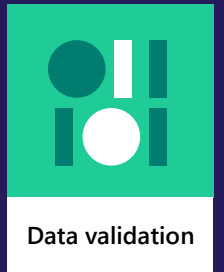
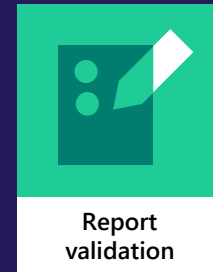
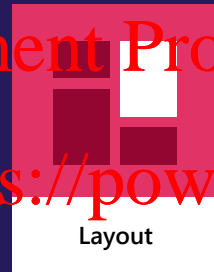
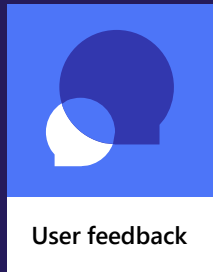
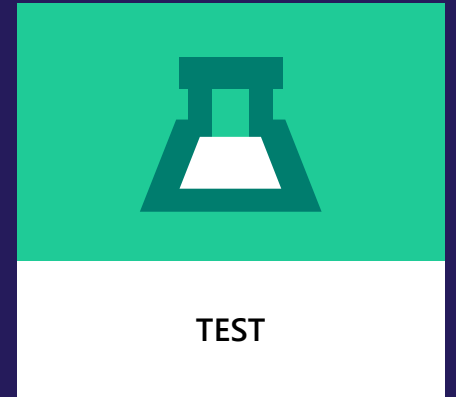
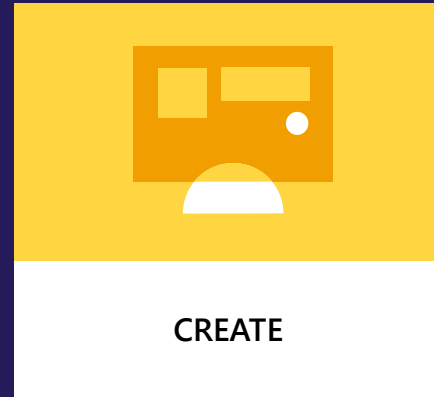
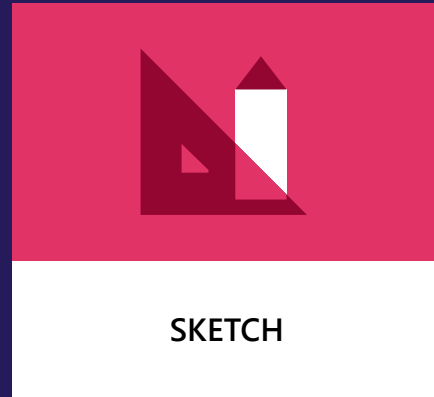
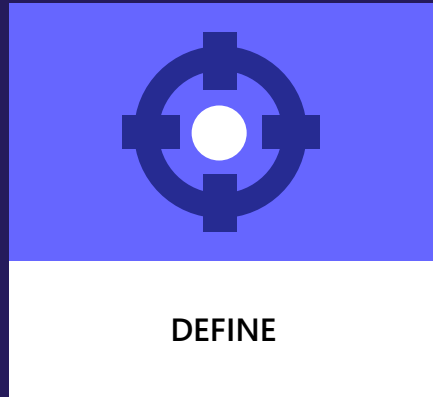
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By Miguel Myers



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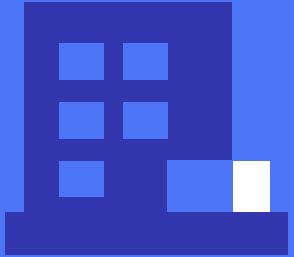
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RESEARCH

USER FEEDBACK





RESEARCH

BUSINESS REQUIREMENTS

90%
Business/end users

10%
Technical/solution
providers

Define **what** the
organization wants or
needs to be able to
achieve.

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Key indicators

Analysis

Actions

Goals

Business processes

Problems to solve



RESEARCH

TECHNICAL REQUIREMENTS

10%
Business/end users

90%
Technical/solution
providers

Define **solutions** for **how**
each project need will be
satisfied. These solutions
are directly linked to one or
more business
requirements.

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Data

Performance

Security

Licensing

Interactivity/Authoring



RESEARCH

DESIGN REQUIREMENTS

50%
Business/end users

50%
Technical/solution
providers

Define the **UI** and **UX**
components that will be
part of the report.

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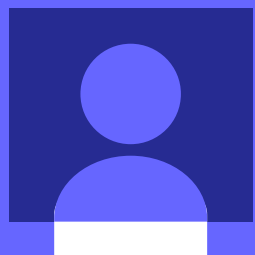
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User preferences

Consumption

Branding

Accessibility



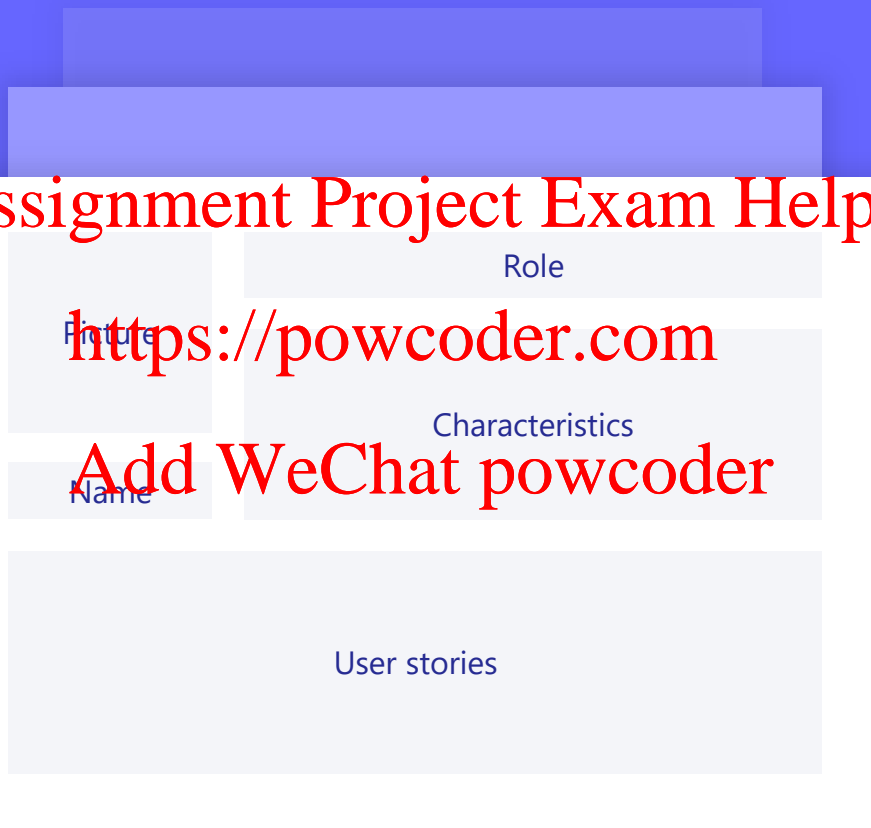
DEFINE PERSONA(S)

Define **user roles**,
preferences and **tasks** to
design the report layout.

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Layout type

Executive

Monitoring

Analytical

Tabular

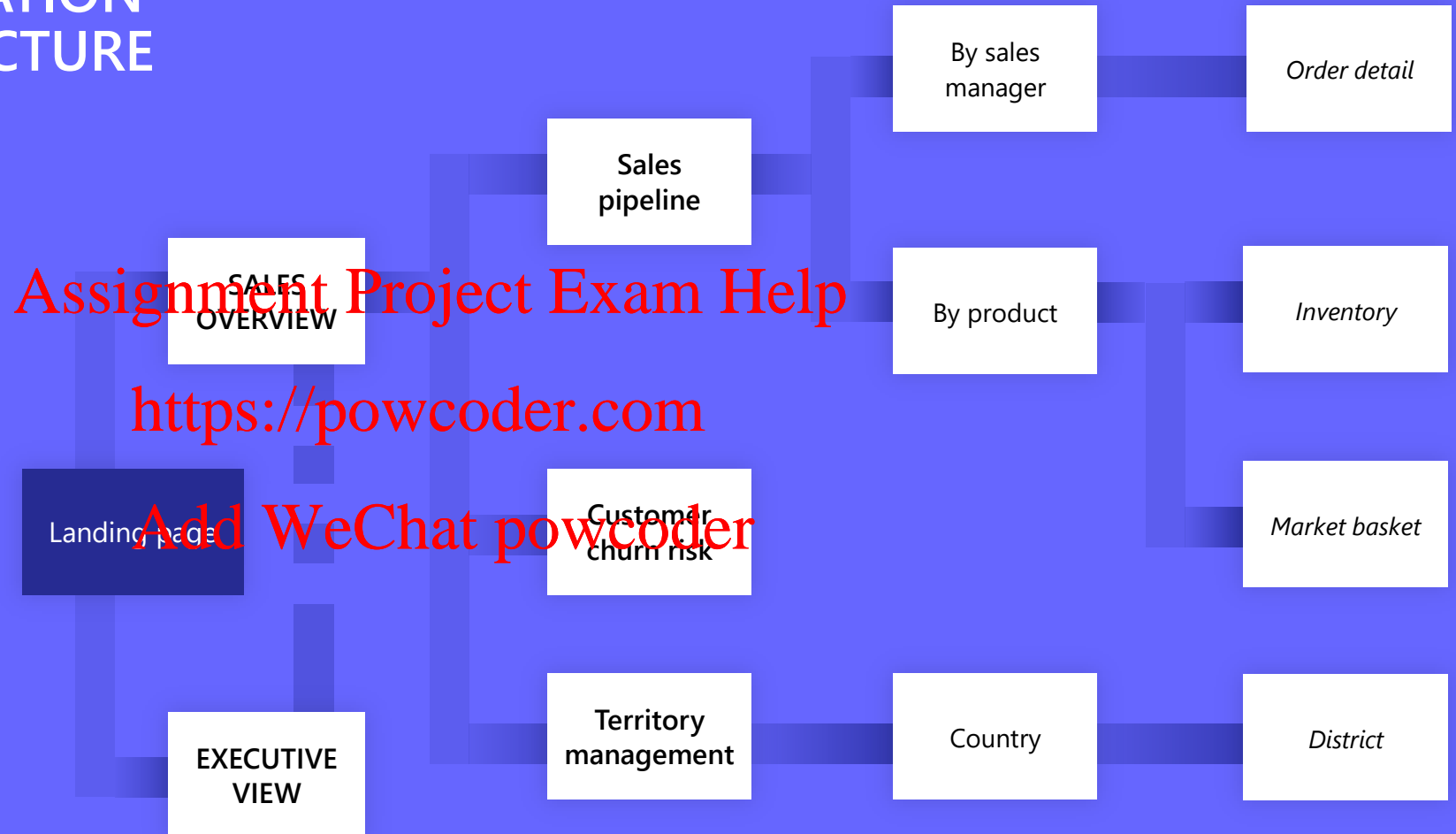
Informative



DEFINE

INFORMATION ARCHITECTURE

Sort through vast amounts of data to provide insight into the effectiveness of business processes.





DEFINE USER FLOW

Describes the **views and experiences** of the path users take to accomplish a varied tasks or goals they have in mind.

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Monica's first task of the day consists of reviewing the status of all infrastructure modules and engage the right people if a high priority incident shows up

START

Open infrastructure status report

Power BI Service

Bookmark

Click on 'more details'

Button

Incident list

Matrix

NO

Is there a high priority incident?

YES

Drill-through

Right click on incident to see the technician info

Send an email

Power App

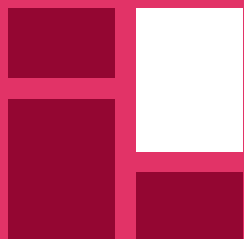
NO

Page tooltip

Review the trend of each module over time

Is a module showing red status?

Card



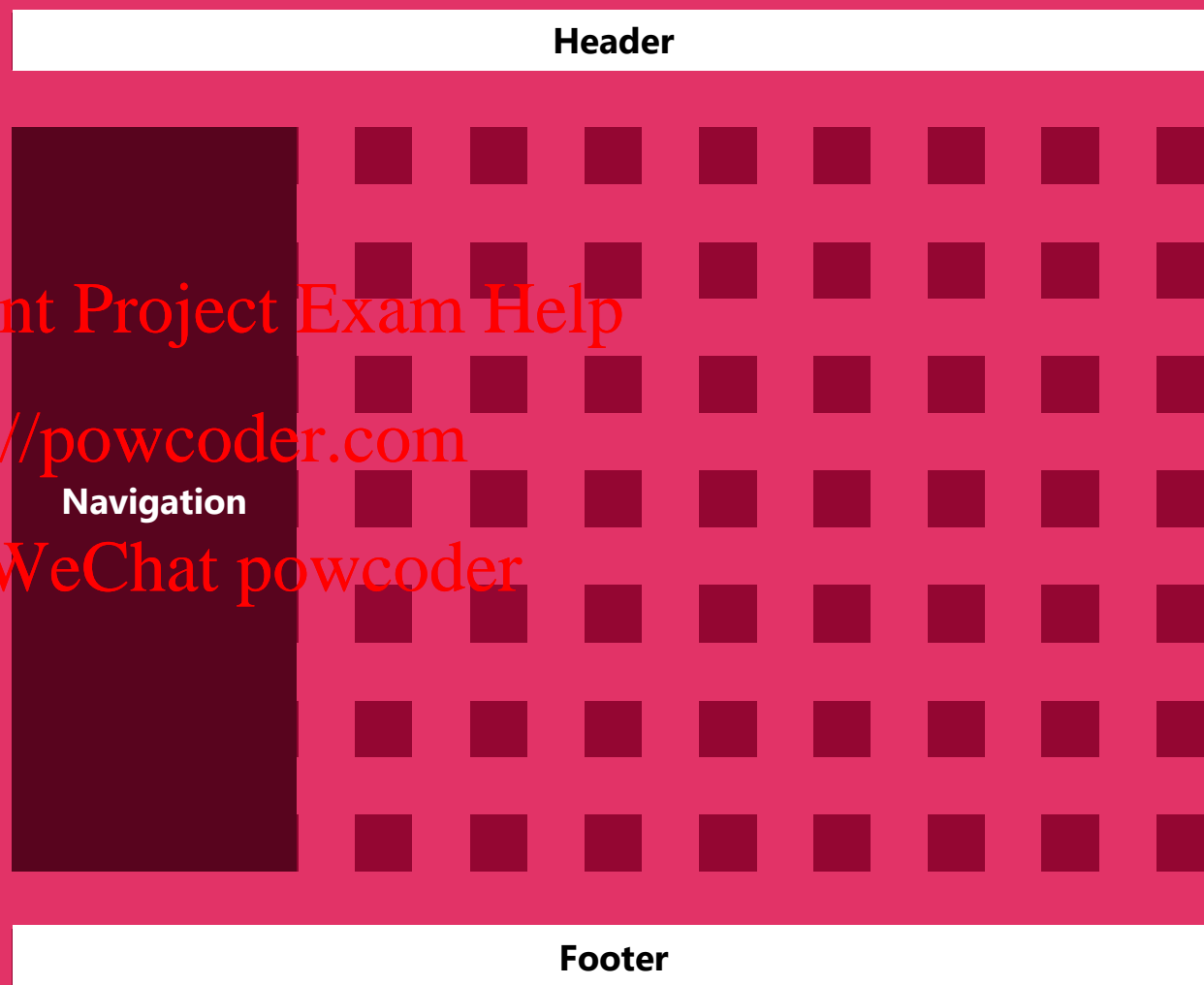
SKETCH LAYOUT

Brings uniformity to all elements and proper spacing to encourage **consistency** across all views.

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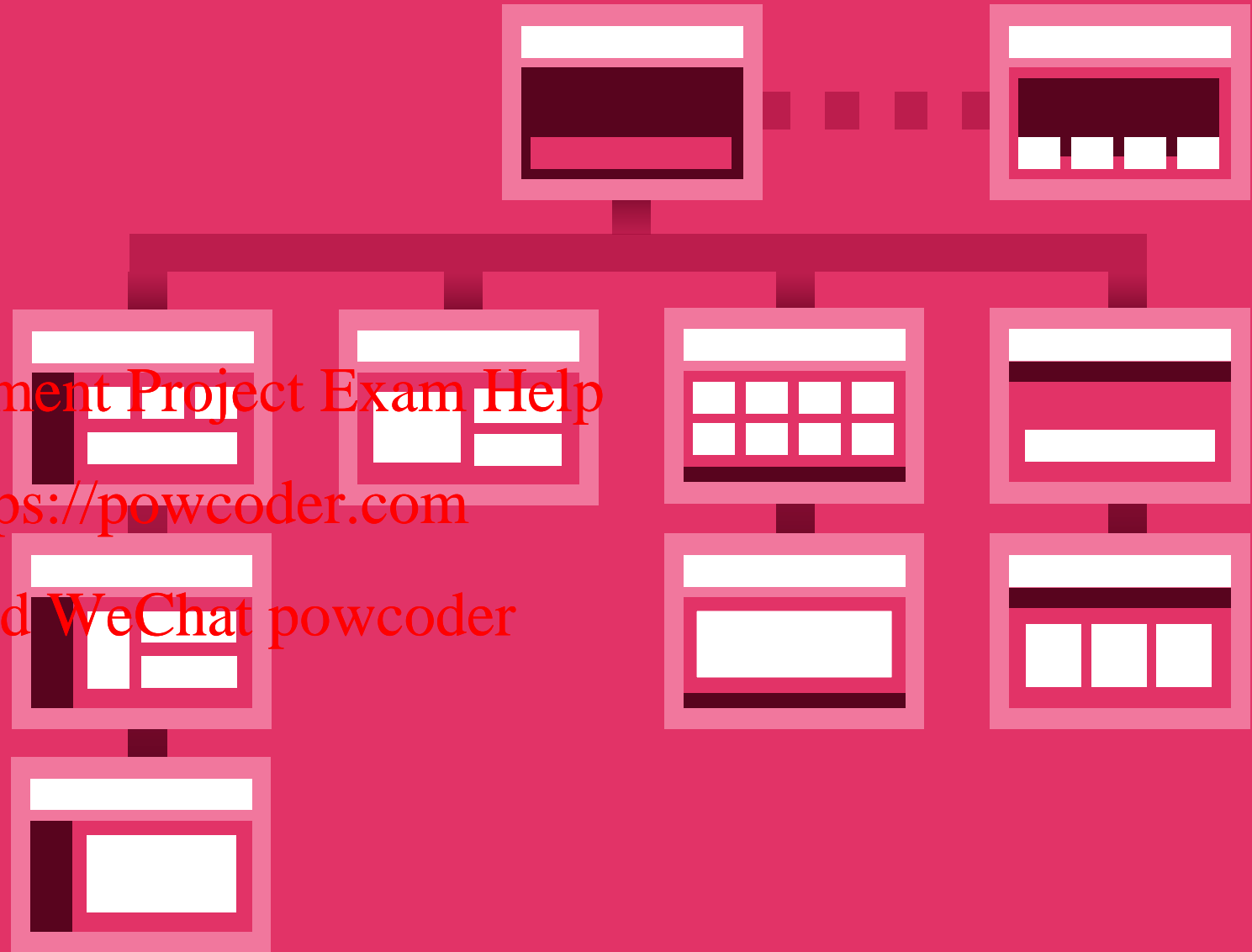
SKETCH WIREFRAME

Add some details and structure to your ideas, **reuse patterns** and create pages on top of your user flows so you'll not leave anything behind.

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Call details Support quality

Last

15

Days

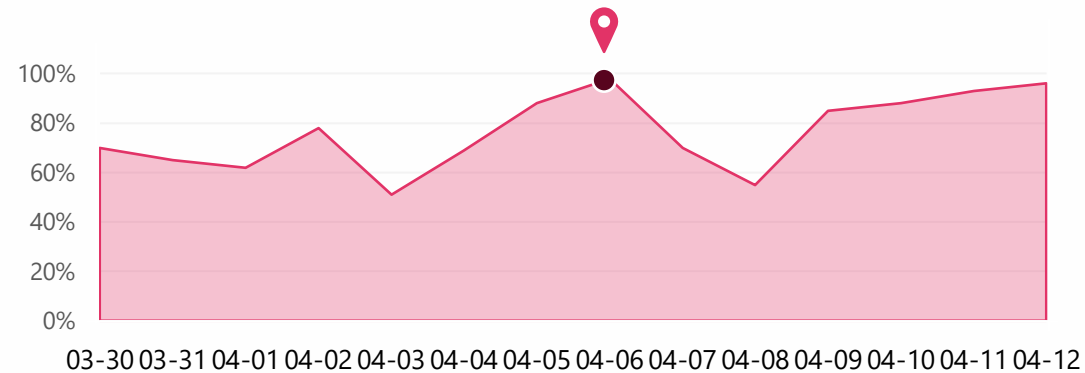
03/30/2021 – 04/12/2021

 Lorem ipsum
5 Lorem ipsum
83% Lorem ipsum
66 Lorem ipsum
542 Lorem ipsum
3%

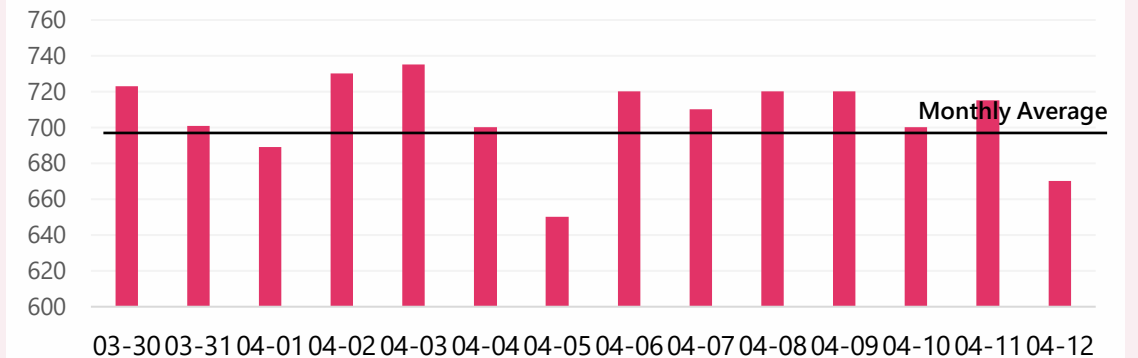
Call Volume by Status Over Time

 Handled  Abandoned

Service Level



Avg Handle Time





CREATE DATA VISUALIZATIONS

Data visualization is the graphical representation of information and data, intended to help identify patterns, trends and outliers.

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What data is used as primary dimension?
Dimension
Text
Number
Date/Time

How is the dimension behaving?
Data type
Nominal
Ordinal
Interval
Ratio

3

Who is the audience?	
What will they need to do?	
Is the visual efficient answering the question or wanting a question to be formulated?	
IF, YES	
How quickly?	
Analysis	
Magnitude	Change over time
Ranking	Distribution
Part of whole	Spatial
Correlation	Narrative
Flow	Deviation



CREATE TYPOGRAPHY

Font family

Aa
Segoe UI

Light
Regular
Semibold
Bold

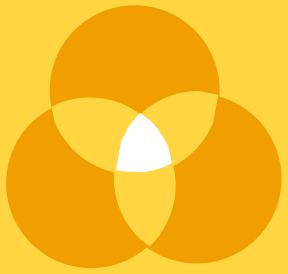
Use font sizes properly, try to follow your guidelines and **keep it simple**. The best visual hierarchies lead users to take the action confidently.

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TYPE	STYLE	SIZE	USAGE
Title	Semibold	11	Visual title, navigation buttons
Subhead	Bold	10	Total (semi-auto), grand total (semi-auto), decomposition tree data labels, navigation buttons (selected), Text-box title (small)
Callout	Semibold	9	Total data labels, card category label, multi-row card title, subtotals, slicer header
Body	Regular	9	Primary axis, category labels, values, row headers, items, question field, Q&A card, filter card, Text-box
Caption small	Regular	8	Secondary axis, visual legend, data labels, conversion rate label, detail labels, target, multi-row card category label, tree header title, restatement, filter pane header, Text-box subtitle



CREATE COLOR

colors.co

Color increases brand recognition, improves data readability, informs, engages and increases participation when it is **used correctly**.

Branding

Custom palette

Accessibility

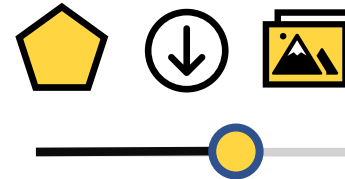
Background

Text

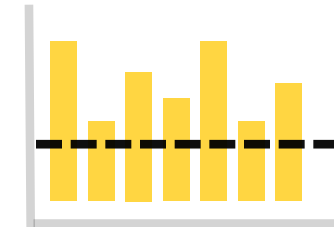
ABCDE
@#%&
12345

Elements

Button



Visuals



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CREATE

IMAGES & ICONS



Units sold
2,561

24% less than last month



New customers
34,811

12% more than last month

Use of icons and images is strongly influenced by context, culture and layout that you use. Keeping a **consistent theme** is key.

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Welcome back, **John**

See the latest report updates, new features, and visuals, and get the most of your dashboard experience.

Explore



CREATE ACCESSIBILITY

Accessible design
benefits everyone.
The more accessible a
product is, the more usable
it will be for everyone.

EnChroma® Color Blind Test |
Test Your Color Vision

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Autistic spectrum	Layout	Color	Clarity	
Screen readers	Layout		Structure	Functionality
Low vision	Layout	Color/ Contrast	Size	
Physical or motor disabilities	Layout			Functionality
Dyslexia	Layout		Size	Functionality
Color-blindness		Color/ Contrast	Clarity	



TEST

THE FINAL STEP

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Report validation

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User testing

Deployment

Launch

Data validation

Concept Poster

A presentation format illustrating the main points of a new idea



*"As A Program Manager
I want to know how my patients & clinicians are resourced
so that I can enable better health outcomes"*



Guide

Identify the topic

Identify a new idea to introduce

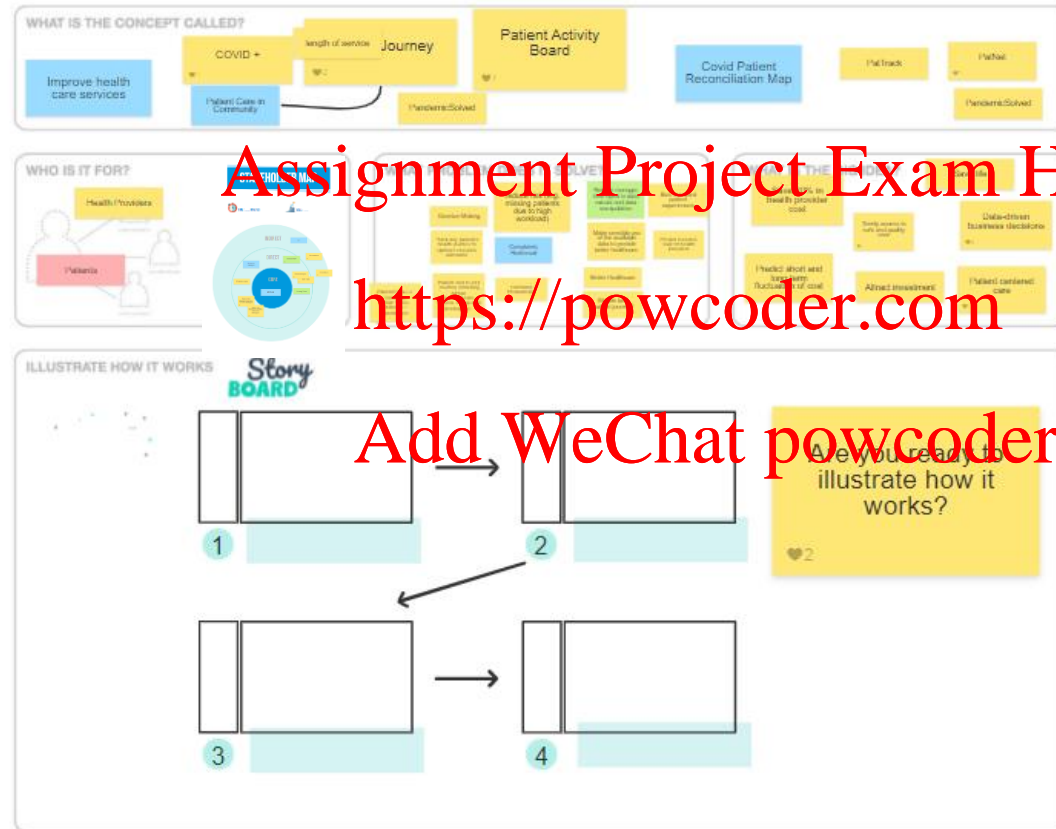
Develop the idea

1. Come up with a name and a tag line for the concept
2. Write a short summary of the big idea
3. Include a description of the key stakeholders
4. List a few features and benefits
5. Illustrate the concept with a big picture or diagram
6. Add a timeline for developing the solution
7. Draft the layout and draw the final poster

Present the idea

Helpful hints:

- Make the first draft quickly. Don't overthink it
- Display the poster prominently to rally enthusiasm



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Step 1 – Information Architecture





DEMO

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Demo Links

Sample Reports

- [Explore Report Designs](#)
- [Sample case study, creating a visually appealing report](#)
- [Why Do Girls Lose Interest in STEM](#)

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Features that help enhance your report

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- [Page navigation and bookmark buttons](#)
- [Drill Through](#)
- [Bookmarks](#) and [Bookmark Navigation](#)
- [Visuals powered by AI](#) and [Smart Narrative](#)
- [Customise Tooltips](#), [Report Page Tooltips](#) and [Header Tooltips](#)
- [Tell a Story with your Data](#) - Embed Power BI in PowerPoint



Next Steps:

[Design effective reports in Power BI - Learn | Microsoft Docs](https://powcoder.com)

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Other Resources

- [Power BI Design Demos](#)
 - [Mastering Bookmarks Playlist by Guy in a Cube](#)
 - [biDezine Youtube channel](#)
 - [Coolors.co](#)
 - [Flaticon](#)
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THANK YOU!

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