Dashboard Standards

Executive Summary –

A typical dashboard requires, but is not limited to, the general page frame, data filters, and the canvas area for visuals. These requirements are outlined below, along with the standards that come with them. The precise placement of the required items is important for framing the page correctly. The template represents the dimensions and axis points on the page for each item (you can copy/paste or go to general when an item is selected to see this).

Additional items are canvas area bookmarks (such as the *Market View*), a summary page, and custom tooltips. While the additional items are not required, they are highly recommended for any Executive Level Power BI Dashboard.

Note: Due to efficiency issues experienced in existing dashboards, please avoid using any marketplace visuals unless you have a specific use case that cannot be addressed with the built in visuals. Many of the marketplace visuals are not optimized by the Microsoft Power BI Team and can have issues populating or cause lag on your dashboard. You can try using the Performance Analyzer to see how certain visuals impact your dashboard.

Dashboard Requirements –

Page Frame –

These items are required in order to be consistent across all pages (except a summary page may not require data filters) and reports. The frame includes: Page Header, Company Logo, Refresh Box, Data Filter Box, the Help button, and the Reset Page button. Be sure to hide the innate Power BI Filter Panel. Each of the page frame items should have visual headers turned off unless there is a specific reason or built in function for the report. For details on the buttons, see the additional items section at the bottom of this document.

Data Filters –

These should be placed directly under the Reset Page button as seen in the template. If you have daily data, then you will likely need to use the Calendar Date slicer. In the cases where a Calendar Date (between) slicer is needed, a maximum of 8 dropdown slicers can fit directly below. The slicer width should not exceed the lining of the “data filters” framing, but due to the varying needs of the total slicers, the heights can be adjusted and “list” slicers can be used.

The most important part of your data filter area is that the slicers are equidistant and sized the same per each slicer type (between, dropdown, list), and they fit within the boundaries of the data filter framing. Additionally, unless you have an agreed upon use case with the business users, slicers should not be pre-filtered (i.e. they should be defaulted to show “All” data points). Please ensure that “multi-select with CTRL” is set to off.

Canvas Area –

This is where you will tell your story. Who is your audience? What are you trying to convey to your audience? Your visuals should highlight interesting things to those seeing them for the first time. Focus your audience’s attention on the most relevant and powerful insight as best you can.

The top left visual should be the most important information and level of importance continues top to bottom, left to right (how you would read a book).

After your initial build, some questions you should ask yourself:

- Where are my visuals redundant?
- What elements can I eliminate to simplify my visuals?
- What is the first thing you notice when you look at your visual?

General Guidelines for all Visuals

- Font: All visual text elements should use a black Segoe font, size 8 unless it is a single metric visual such as a card, gauge, or KPI visual. The single metric visuals may require larger font sizes. Typically, only the chart titles are bolded.
- Colors: Each visual should follow the ordered color scheme defined in the template (red, black, gray, gold, etc.), certain exceptions can be made depending on the visual to change the color priority. You must use the exact HEX combination found in custom colors.
- Spacing: Visuals should always remain within the canvas area (not exceeding the range of the page header or the bottom border of the data filter), perfectly aligned with the page header.
- Title: All visuals should have a clear and concise Title explaining the measure or metric used versus the category or time variable. Chart titles should be black bolded and matrix titles should be white bolded with a red background.
  - Ideally, your data points or main chart area is free of words so it cannot truncate as the data changes.
  - If the title and legend are appropriately used, then your data points can be unencumbered of words.
- Legend: When a chart is used, then the legend should provide the appropriate wording for the category used in the visual. The legend should be bottom centered, no title, with a line and markers style.
- X-axis: should be clear and concise, try to limit any wording cut-offs
  - Font: Segoe UI, Size: 8, Color: Black; Title: off (use in chart title)
- Y-axis: the visual title should contain the value, so a y-axis title is not needed typically. The units can be set to auto but make sure they are clear (common trouble when auto gets set to billions).
  - Font: Segoe UI, Size: 8, Color: Black; Title: off (use in chart title)
- Backgrounds: Visuals do not require a background, meaning they should blend with the page so the values and important items pop out easily.
- Sorting: If the chart is not over time, sort by descending metric values (typically y-axis value)
- Data labels: Should be used sparingly to aid an unclear visual (such as a stacked chart) or draw attention to an important metric, otherwise tooltips should suffice. Use white as it looks best with the primary four colors.
- Focus: To make a visual pop or stand out, try to use shadowing (as done in template) instead of borders (borders can be distracting and take away from your visual). Borders should be used sparingly and are considered a situational play.
- Visual Header: All visuals should have visual headers turned on to allow users to export, show as a table, or spotlight a visual.
- Total Charts: Your Dashboard page should not contain more than 4 large charts in the main canvas area, so that you are not overwhelming your audience.
  - The top two charts in the template are the maximum size recommended for dashboards with more than two charts.

Individual Visual Matrix

This matrix lists the most relevant visuals for reporting in Power BI (as of 1/14/21). Do not feel limited to the visuals listed here, however, it is important to keep your audience in mind and keep it simple where possible. Try to avoid using marketplace visuals unless you have a specific use case that cannot be addressed with the built in visuals.

<table>
<tr><th colspan="11">Visuals</th></tr>
<tr><th>Visual</th><th>Legend</th><th>X-axis (or column header)</th><th>Y-axis (or row header)</th><th>Data Labels</th><th>Title</th><th>Border</th><th>Shadow</th><th>Custom Tooltip</th><th>Visual Header</th></tr>
<tr><td>Bar / Column Clustered</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Situational</td><td>Yes</td><td>No</td><td rowspan="13">Use to add pop to visuals that need more attention. This will vary between every report. You can also break your page down into sections with shadows like the template.</td><td>Situational</td><td>Yes</td></tr>
<tr><td>Bar / Column Stacked</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Yes</td><td>Yes</td><td>No</td><td>Yes</td><td>Yes</td></tr>
<tr><td>Line</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Situational</td><td>Yes</td><td>No</td><td>Situational</td><td>Yes</td></tr>
<tr><td>Area</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Situational</td><td>Yes</td><td>No</td><td>Situational</td><td>Yes</td></tr>
<tr><td>Line and Bar / Column Clustered</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Situational</td><td>Yes</td><td>No</td><td>Situational</td><td>Yes</td></tr>
<tr><td>Line and Bar / Column Stacked</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Yes</td><td>Yes</td><td>No</td><td>Yes</td><td>Yes</td></tr>
<tr><td>Pie / Donut</td><td>Yes - Bottom Center</td><td>Category Only</td><td>Value only</td><td>Data Values & Percents</td><td>Yes</td><td>No</td><td>Not Required</td><td>Yes</td></tr>
<tr><td>Card</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>Yes</td><td>Situational</td><td>No</td><td>Yes</td></tr>
<tr><td>KPI</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>Yes</td><td>Situational</td><td>No</td><td>Yes</td></tr>
<tr><td>Gauge</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>Yes</td><td>Situational</td><td>No</td><td>Yes</td></tr>
<tr><td>Matrix</td><td>N/A</td><td>Bottom outlined (red), centered, no background, size 8 segoe</td><td>Right outlined (red), centered, no background, size 8 bold segoe</td><td>N/A</td><td>Yes red background Segoe bold</td><td>Situational</td><td>Not Required</td><td>Yes</td></tr>
<tr><td>Decomposition Tree</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>Yes</td><td>Situational</td><td>No</td><td>Yes</td></tr>
<tr><td>Maps</td><td>Yes - Bottom Center</td><td>N/A</td><td>N/A</td><td>N/A</td><td>Yes</td><td>Situational</td><td>Yes</td><td>Yes</td></tr>
</table>

Additional Items –

Bookmarks –

Help Button: The help button should contain information in the context of the current page only. This should have the data sources used (schemas and tables names), the key measures and how they are calculated, and any tips/pointers/items to highlight for the page. Do not exceed the page (no scrolling). If you need more space, prioritize the data sources and measures, possibly leaving out the tips. This information will answer questions that we receive regularly from users about data sources and measures.

Reset Page: This button simply allows the users to start over if they get lost in what they were doing or an issue occurs.

Market View: This view is currently a work in progress, however, the framing is completed and any visuals you place in here should align with the current frame. The market view button (name can be changed depending on your reporting context/needs) is to give further insight into to what was seen on the home page. Some users are more technical and can handle more information, this is a good place to more granular or specific information on KPI's, branches, or whatever is important.

Summary Page –

A summary page is typically not required for just a couple page reports. If you have an executive level audience and your report is 3+ pages then you might consider a summary page that includes the most important information from each page. Think of this page as an executive summary and place highlights that only require a minute or two to digest what is happening or happened.

Custom Tooltips –

Essentially, these are miniature visuals that are created on their own tooltip page (hidden from view). You can apply all of the same guidelines mentioned previously. These add valuable detail without cluttering up the page with more visuals. You can only have one custom tooltip per page, so try to create tips that can be used across multiple visuals. Remember to always hide the tooltip pages from view so they do not show in production.