Data visualization tips and tricks

You have created eight different report pages filled with different visuals and investigated different configuration options for each of them. That being said, you have barely scratched the surface of all the features that are available to you, and with the very quick update cycle that Power BI has, that list of features will keep growing. This final section will explore a couple of features that are not exclusive to just one visual but can really help out when designing a report. It is highly recommended to watch the monthly videos that the Power BI team embeds in the product update announcements each month, which are published at https://powerbi.microsoft.com/blog/. This way, you can know exactly what is new and how to use it.

Changing visuals

Throughout this chapter, the workflow has been the same: add a blank visual then add fields. Often, this will work in a real-world development environment as well. However, there are times when you will not know what the best visual is for your data. It is not uncommon to create a bar chart only to realize you need to use a date that would be better served as a column chart. Maybe the requirements change, and the table needs to have an additional category added to the row groups causing the visual to switch to a matrix. It is entirely possible to rebuild the visual; however, the more useful option is to simply change an existing visual.

To change between visuals, simply select an existing visual on the **Report** canvas and select the desired visual from the **Visualizations** pane.

Be sure to note that when changing between visualizations, the field buckets are often different, which may cause some fields to be dropped from the visual. For instance, switching from a **Column chart** to a **Treemap** generally works well. The axis on the **Column chart** becomes the group on the treemap.

However, switching to a gauge will cause Power BI to pick a single field for the value and all other fields will be dropped. Power BI does maintain the metadata from your visual choices and, as long as no other major changes have been made, you can often switch between visuals and your prior settings will be restored. The prior visual metadata is cleared when Power BI Desktop is closed.

Formatting visuals

Many references have been made in this chapter to conditional formatting and visual formatting. These options can help enhance the look of a report and help users gain an understanding of the data more quickly by drawing their eye to specific elements or making certain key information stand out. It is highly recommended to explore the **Format** section of the **Visualizations** pane for each of the visuals created in this lesson to see the options that are available. Some options, like the title text, background, and visual header toggle, are nearly universal. In general, visuals from the same family will share the same, or very similar, options. For instance, a table and matrix will both have options for formatting the headers, values, and grid lines, while the trend charts will have options for axis scales, data labels, and plot surface. It is often useful to work on formatting a single visual to the desired look and then use the **Format painter** to apply the same settings to other visuals.

Not all options will transfer (for instance, no grid lines on a pie chart) but the overlap will transfer even to visuals of a completely visualization different type.

The Analytics section

For every visual, you worked with the **Fields** section and the **Format** section of the **Visualizations** pane, but there is an option you may have noticed that is called **Analytics**. This option is available for most visuals; for our example, look at the **Line chart** example created earlier in this chapter. Once you have that visual selected, you can navigate to the **Analytics** section and see that you are presented with eight different line types that can be added to the visual. All you must do is decide which one to be displayed and turn it on. For

this visual, add an **Average line** by expanding that section and selecting the **Add line** option. Once the line has been added, you can change the color, name, transparency, style, and position from this same area. Users can add as many of these lines as they choose, but remember, more is not necessarily better.

Additionally, if the visualization is based on a time data source, a forecast option will appear in the **Analytics** section. Specify the necessary input information such as forecast length and confidence interval and a forecast line will be added to the visual.

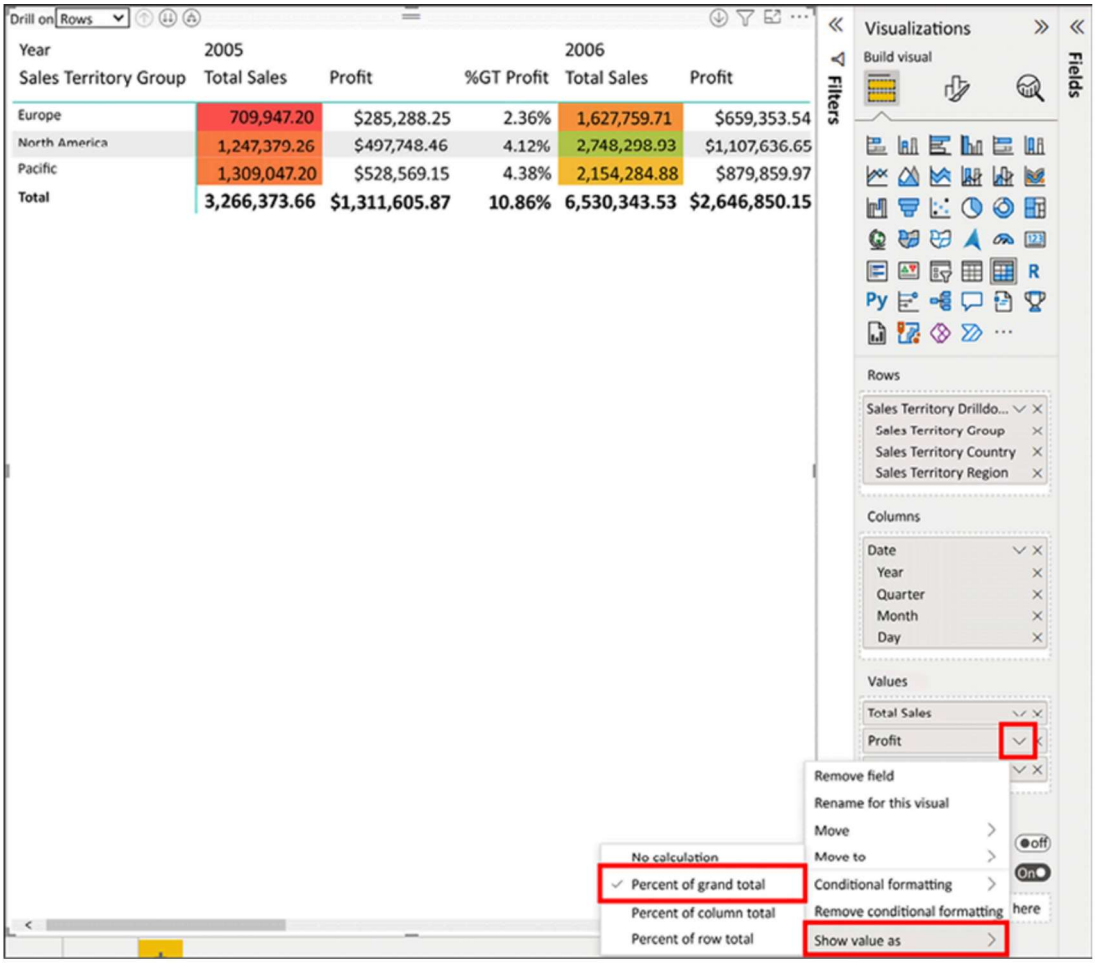
The Top N filter

At the very beginning of this chapter, there was a brief explanation about the **Filters** pane and how filters can be applied to different scopes. There are a couple of choices available to users for the filter fields, but the focus here will be on the **Top N** option. Even though it is called the **Top N** filter, this option allows a filter that will show either the top or bottom number of values. For example, if you look at the **Ribbon chart** created earlier in this chapter, you can see that there are six countries that appear in the visual. With this filter, you can set it so that it only displays the top four countries based on a chosen measure. So, in this situation, you could have that measure be **Total Sales**, which is what the visual is showing, or anything you want. Let's go ahead and click the dropdown next to the **EnglishCountryRegion** field in the **Filters on this visual** section. If **Top N** isn't showing by default in the **Filter type** section, select it from the dropdown. For the **Show items** section, leave the value of **Top** and manually input the number **4**, as shown in *Figure 6.48*. The last thing that needs to be done is to decide what measure will be used to determine the top four countries; keep things simple and drag in the **Total Sales** measure, and click **Apply filter**. The most important thing to remember is that you can use any measure you want for this filter.

The **Top N** option can also be changed to advanced filtering, which allows for string search, blank, include/exclude, and range filtering.

Show value as

Earlier in this chapter, you went through an example to take advantage of conditional formatting. This option can be found by clicking the downward arrow next to a field that is being used in a visual. Within this area is where you will find another option, which is labeled **Show value as**. This option will only be available for numeric data types and allows values to be displayed as a percentage of the grand total. The best way to take advantage of this is to place an identical column side by side and then use this option to display one of them as a percentage. For our example, revisit the **Matrix** visual you created for the **Tabular data** section. Locate the **Profit** measure in the **Fields** pane and drag it into the **Values** bucket for the visual, placing it directly after the **Profit** measure that is already in place The visual looks a little odd since there is a duplicated column, but now change the new field to show a percentage. Within the dropdown for the second representation of **Profit**, choose the **Show value as** option and select **Percent of grand total**.



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◄ Lesson 5 Quiz

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Exercise 16 - Filtering visualizations and data ►

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