

06_FAQs on developing dashboards

Last updated by | TTa | Oct 10, 2019 at 1:02 PM GMT+2

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Here are some frequent technical solutions for building PowerBI dashboards

Change how visuals interact in a Power BI report

[Microsoft instruction](#) ↗

Format color from a bar chart

- Click on the Paintbrush on the right side of the report
- Choose "Data colors"
- Right click on the "Conditional formatting"
- Choose the wanted format then click OK

The screenshot shows the Power BI desktop interface. On the left, the 'VISUALIZATIONS' pane contains various visualization icons. Below it, the 'General' settings show 'X axis' and 'Y axis' both set to 'On'. Under 'Data colors', there's a 'Default color' section with an 'fx' button (highlighted with a red box labeled '2') and a dropdown menu showing 'Conditional formatting' and 'Revert to default'. The 'Conditional formatting' menu lists fields: 'producer_no' (selected with a yellow checkmark), 'profession', and 'relative_premium'. The 'FIELDS' pane on the right lists numerous fields starting with 'Σ' and 'is_'. A search bar at the top of the Fields pane is empty.

Default color - Data colors

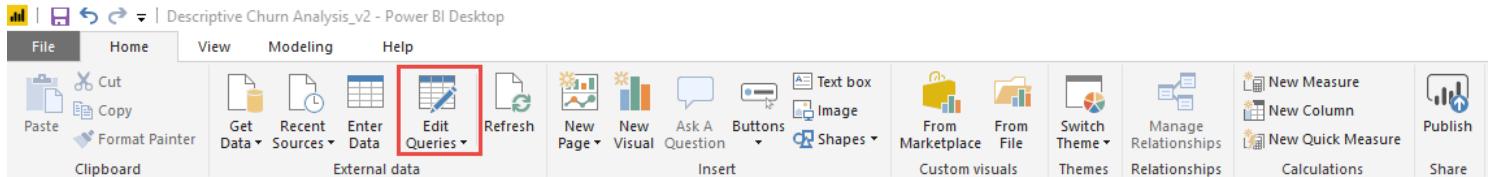
This screenshot shows the 'Conditional formatting' rules editor. At the top, it says 'Format by Rules' and 'Learn more'. Below that, 'Based on field' is set to '% Change Churn Ratio'. The 'Rules' section contains one rule: 'If value is greater than or equal to 0 and is less than or equal to Maximum then [red square]'. There are buttons for '+ Add' and deleting rules.

Shape Maps in Power BI Desktop

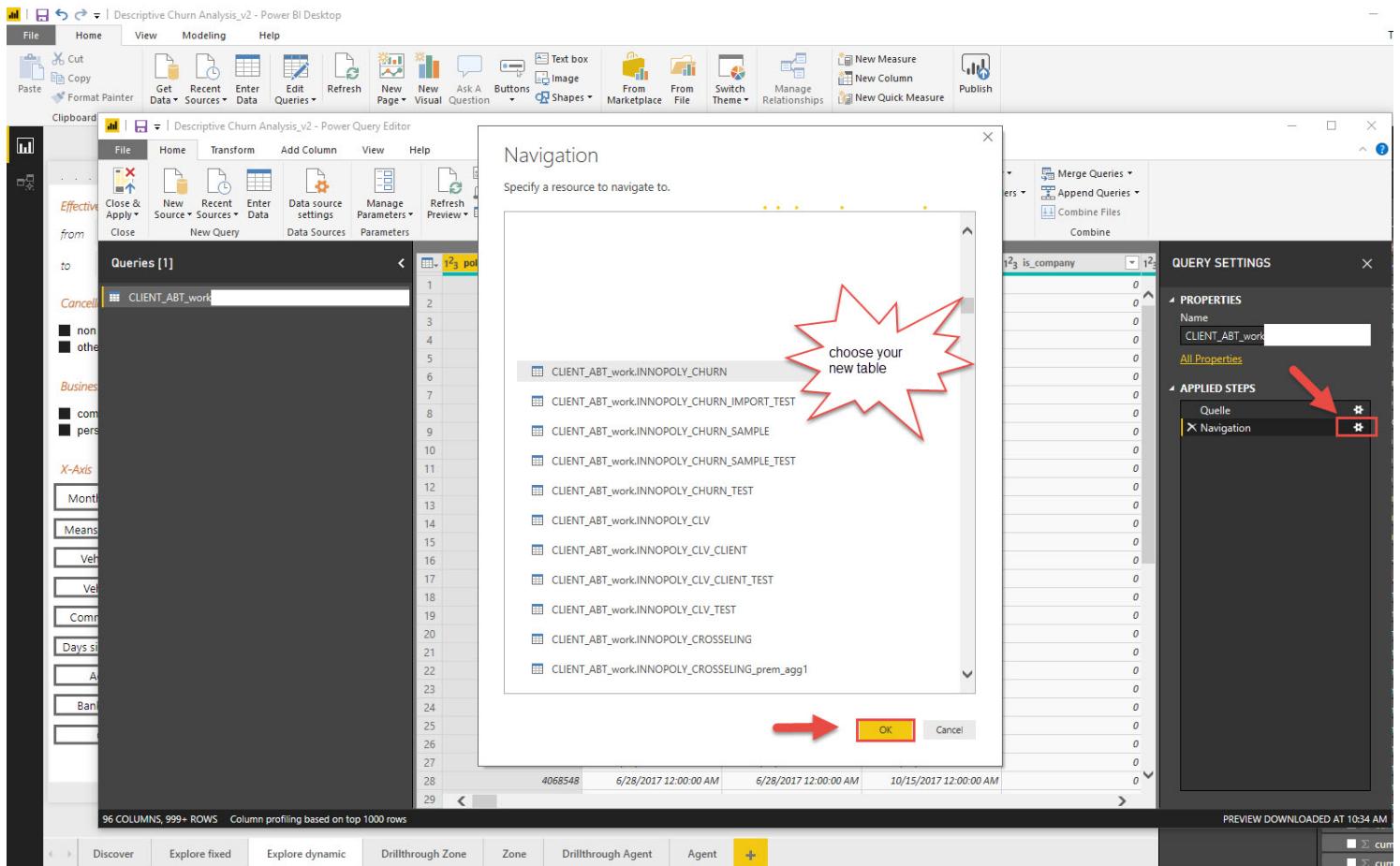
[Microsoft instruction ↗](#)

Update Query in Power BI Desktop

- Click on **Edit Queries**

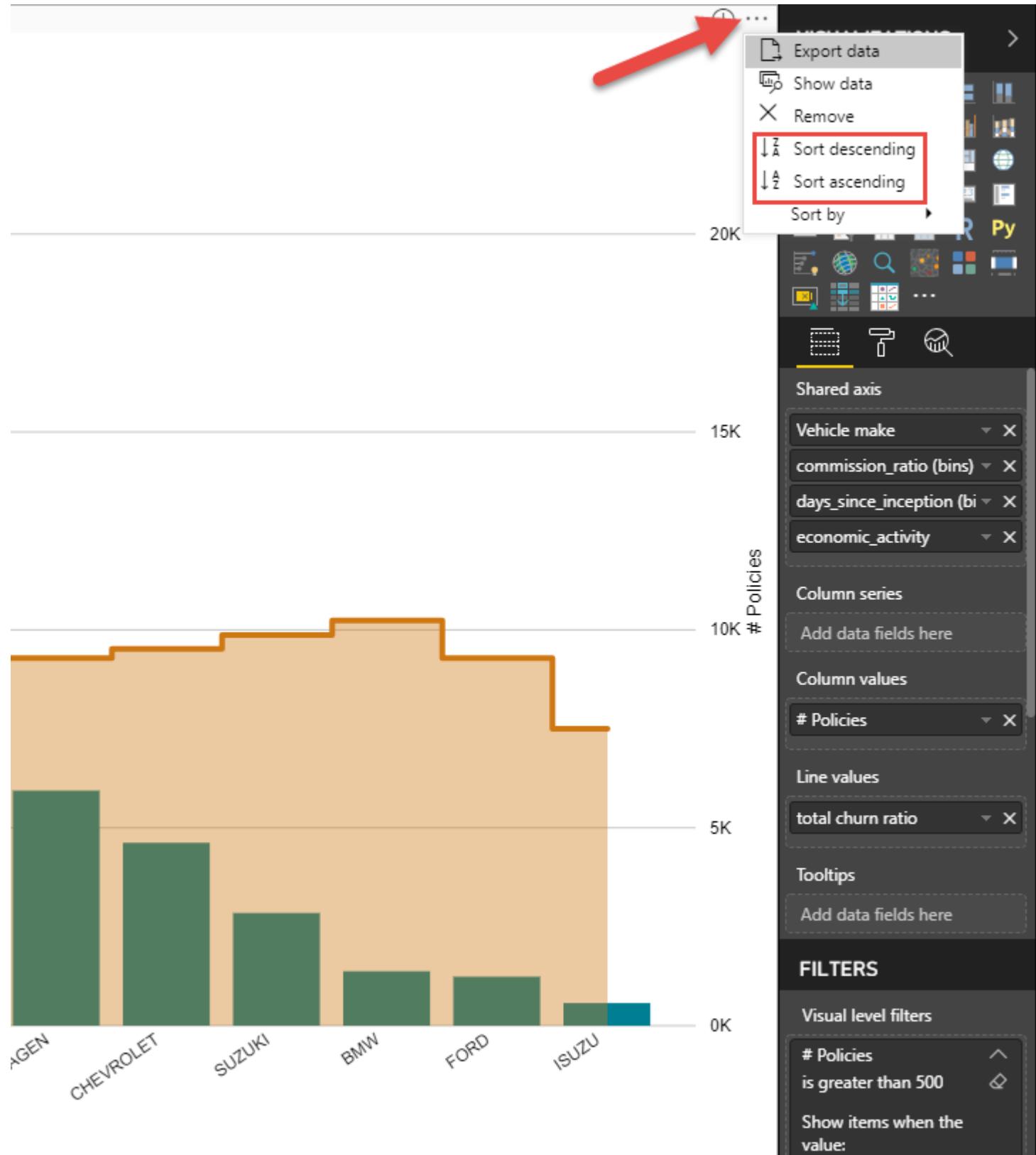


- Next, click on the Wheel icon next to Navigation (see below photo).
- Choose your new table then click on OK.



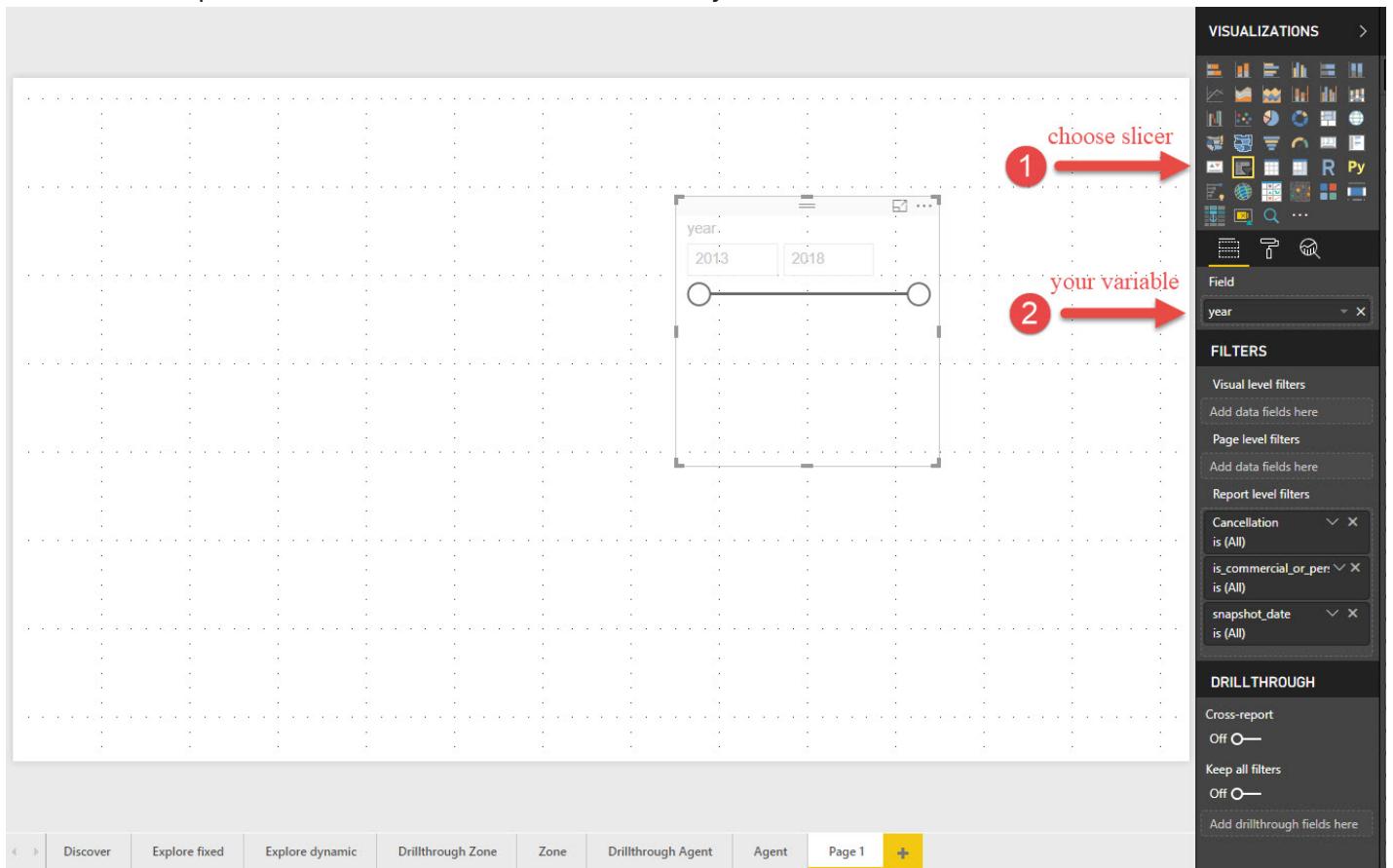
Sort data from A -> Z or from Z -> A

- Click on the 3 dot from the right side of the grafic and choose the way you want to sort your data.



Slicer dropdown

- To create a dropdown list in Power BI dashboard, what you need to do is choose a slicer and its variable.



- Turn on the Slicer header (usually it's ON when you first chose the slicer)
- Move your mouse to the upper right of the slicer and click on the down arrow. You will see Dropdown, choose it. Now you are having your wanted dropdown list. Enjoy.

The screenshot shows a Power BI dashboard interface. On the left, there is a large grid area. In the center, a dropdown slicer is displayed with the year '2013' selected. A context menu is open over the slicer, listing options: 'List', 'Dropdown' (which is highlighted in grey), 'Between', 'Less than or equal to', and 'Greater than or equal to'. A red arrow points from the text 'Choose dropdown' to the 'Dropdown' option in the menu. A red circle with the number '3' is positioned near the top right of the menu. To the right of the dashboard is a dark sidebar titled 'VISUALIZATIONS' containing various icons for different visualization types. Below the sidebar, a list of settings is shown, with 'Slicer header' set to 'On' (indicated by a red box). Other settings include 'General', 'Numeric inputs', 'Slider', 'Title', 'Background', 'Lock aspect', 'Border', and 'Visual header', all currently set to 'Off'.

How to modify the legend order in Power BI

For this example, we're using a bar chart with MoM keyword rankings grouped by positions. We've grouped keyword rankings into the following position groups:

Positions 1-3

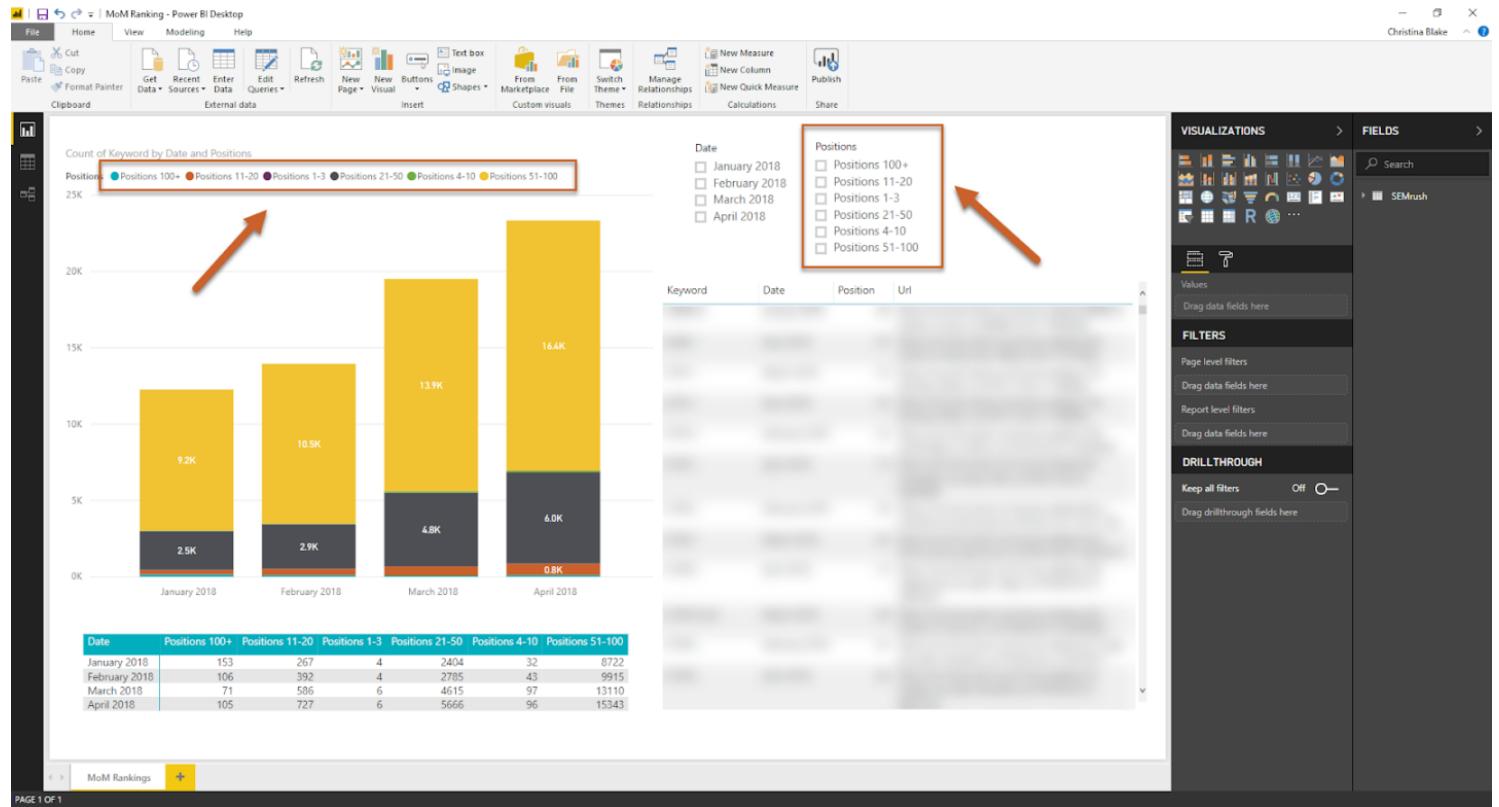
Positions 4-10

Positions 11-20

Positions 21-50

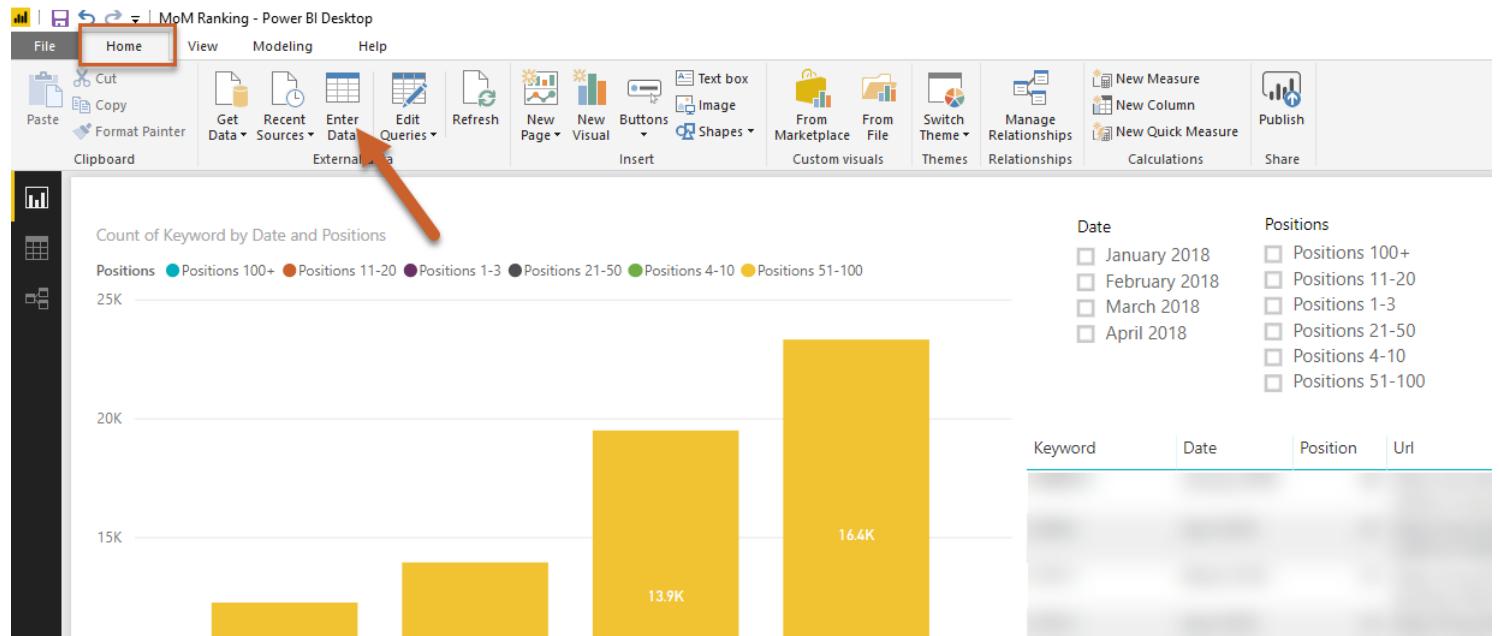
Positions 51-100

In the example, the positions are out of order—this results in the stacked bar chart showing positions 100+ at the bottom, then 11-20, then 1-3, then 21-50, then 4-10, and finally 51-100 at the top. Not ideal.



1/ Create a new table with your sort order

Create a simple table with two columns by selecting the enter data icon under the home tab.



In one column (example: "Group"), include the groups you want to sort, making sure to enter the groups exactly as written (case-sensitive). In the second column (example: "Order"), add numbers to designate your sort order. For a bar chart, these numbers will be "backwards", so that 100+ will be at the bottom and 1-3 will be at the top.

Create Table

	Group	Order	*
1	Positions 1-3	6	
2	Positions 4-10	5	
3	Positions 11-20	4	
4	Positions 21-50	3	
5	Positions 51-100	2	
6	Positions 100+	1	
*			

Name:

2/ Create a relationship between the new table and your data

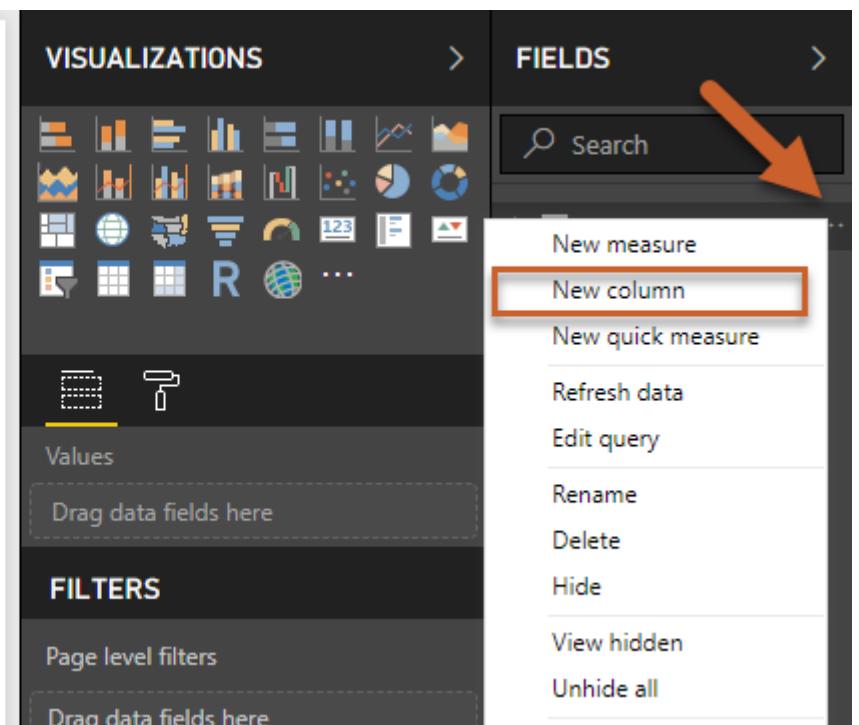
Select manage relationships and create a relationship between the new table and the original table.

The screenshot shows the Power BI Desktop interface with a bar chart titled 'Count of Keyword by Date and Positions'. The chart displays data for January, February, and March 2018, with values 9.2K, 10.5K, and 13.9K respectively. Below the chart is a table of raw data. On the ribbon, the 'Relationships' icon is highlighted with a red box and a red arrow pointing to it. A modal dialog box titled 'Manage relationships' is open, showing the 'From: Table (Columns)' tab. At the bottom left of this dialog, there is a red box and a red arrow pointing to the 'New...' button.

The screenshot shows the Power BI Desktop interface with the same bar chart and table as the previous screenshot. A modal dialog box titled 'Create relationship' is open. In the 'Group' section, there is a table with three rows: 'Positions 1-3', 'Positions 4-10', and 'Positions 11-20'. A red box and a red arrow point to the 'Sort' button next to this table. The 'Order' column shows values 6, 5, and 4 respectively. To the right of the dialog, there is a preview pane showing SEMrush data and a 'Cross filter direction' dropdown set to 'Both'.

3/ Use the DAX related function to create a sort order

In the original table, create a custom column by right clicking on the ellipses to the right of the original table and selecting new column.

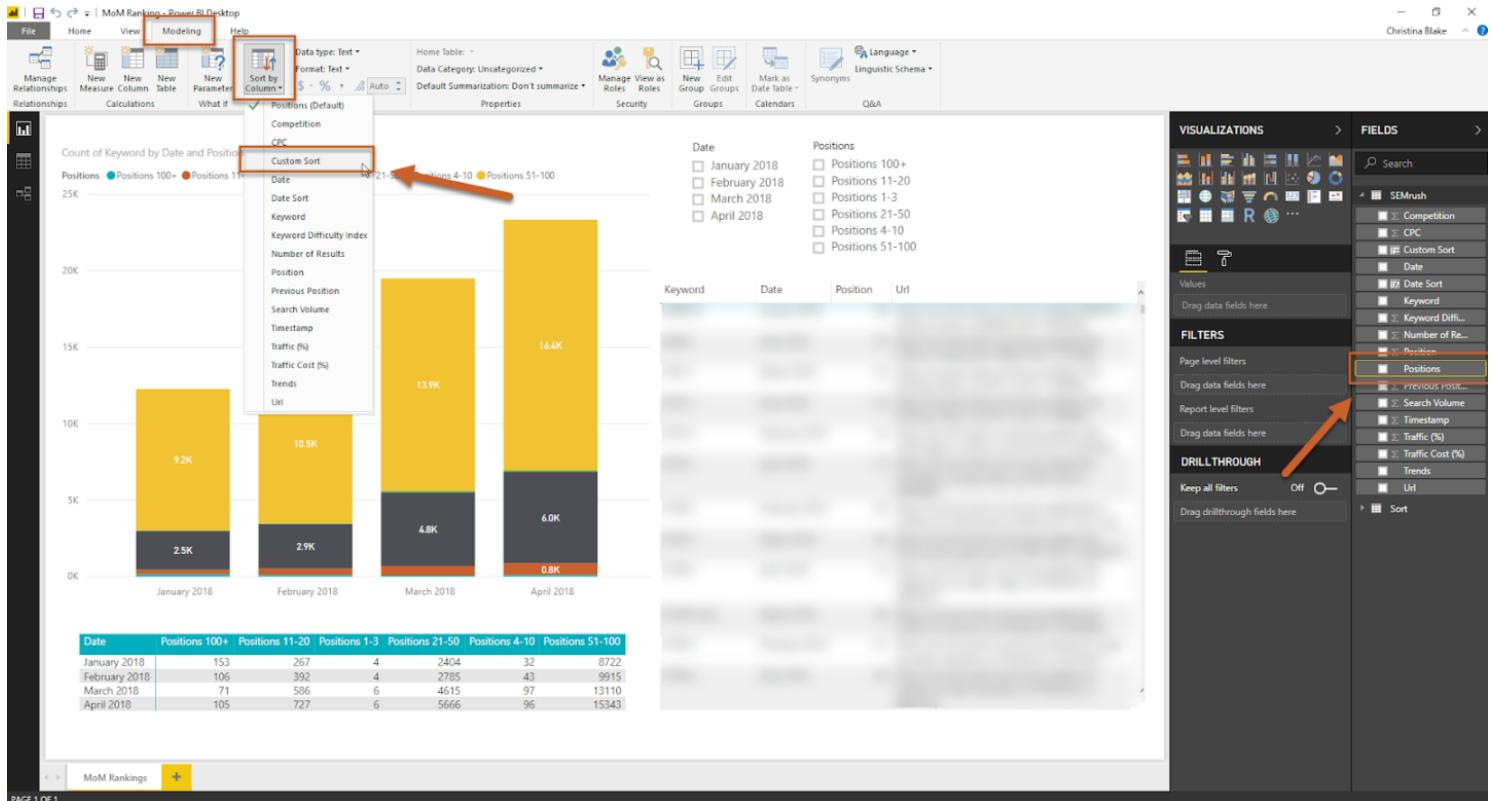


Use the DAX function Custom Column = **RELATED**(Table[Column]). For this example, the formula should look like "Custom Sort = RELATED(Sort[Order])".

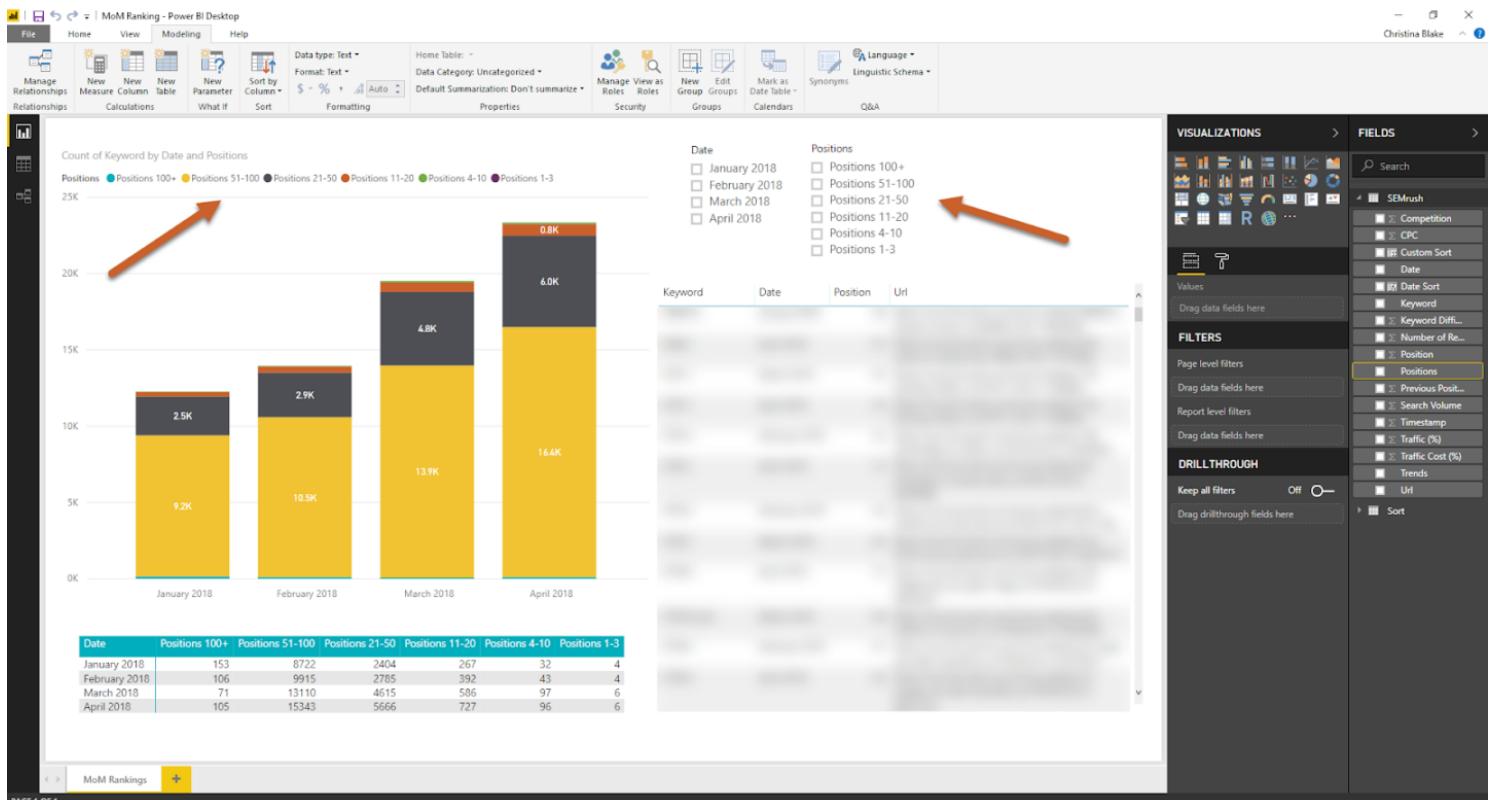
The screenshot shows the Power BI Desktop ribbon with the Home tab selected. The formula bar at the top contains the DAX formula: `Custom Sort = RELATED(Sort[Order])`, which is highlighted with a red box. Below the ribbon, a chart titled 'Count of Keyword by Date and Positions' is visible, showing a legend for different position ranges.

4/ Sort your column by your custom sort order

Select the column you want to sort with your custom order (for this example, "Positions") and select sort by column under the modeling tab, select the name of your custom column (in this example, "Custom Sort").



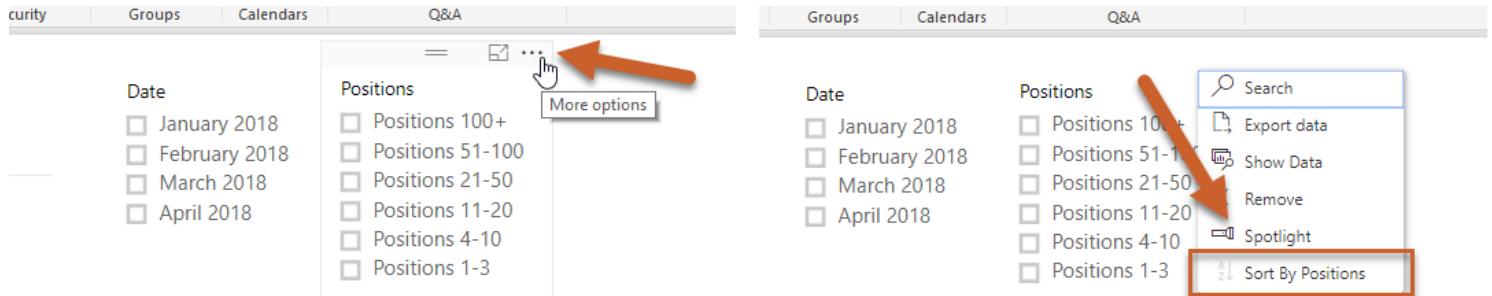
You're done! The bar chart is now organized with highest ranking positions at the top and lowest at the bottom.



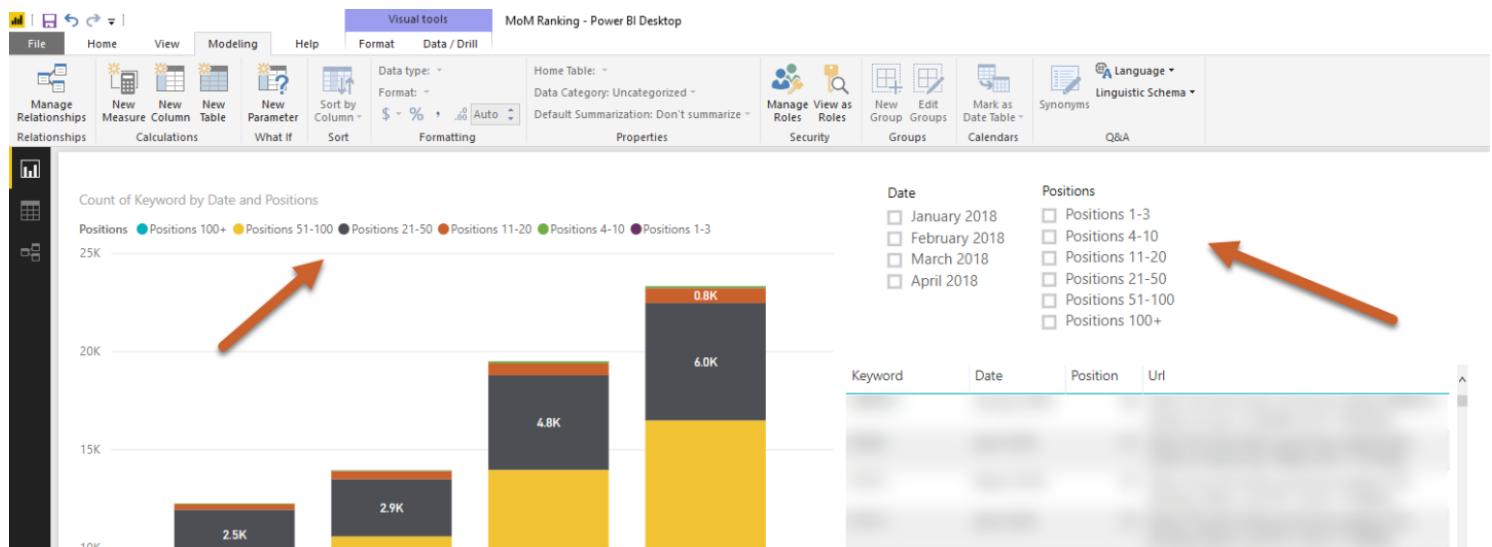
But wait—the slicer is backwards (reading lowest ranking positions at the top and highest at the bottom), which is a little annoying.

5/ Custom sorting charts

To sort the slicer so that highest ranking is at the top and lowest is at the bottom, right click the ellipses at the top right of the table to open more options. At the bottom, select sort by positions to switch the A-Z sort from Z-A.



Good to go!



[Source: <https://www.seerinteractive.com/blog/reorder-powerbi-legend/>]