

Report Design Best Practices in Power BI

Friday 9th of June, 2023



Maarten Van den Broeck

Senior Content Developer



Power BI dashboards vs. reports

Power BI Dashboard

- Critical business or operational metrics
- Often in real time
- Single-view
- Lacks interactivity

Power BI Report

- Application-like experience for users
- Often historical data
- Multiple pages
- Interactive functionality
- Focus of this webinar



Power BI dashboards vs. reports

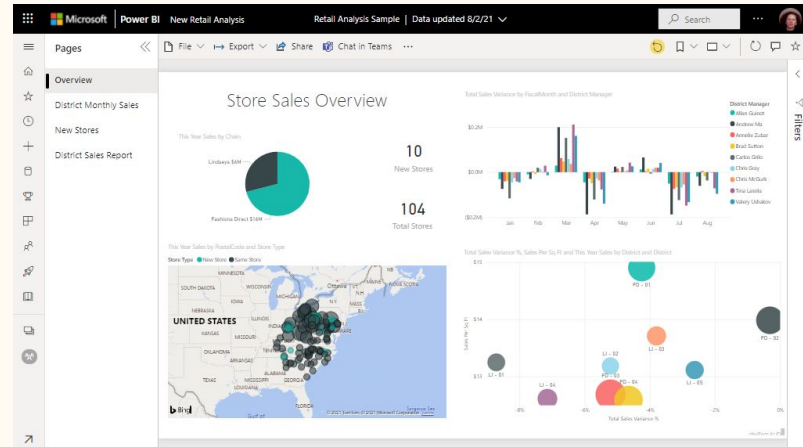
Power BI Dashboard

- Fast analysis
- Limited interactivity



Power BI Report

- Detailed analysis
- More interactivity, users are in front of PC



Navigating a report

Bookmarks

- A way of capturing a pre-defined state in Power BI
- Similar to browser bookmarks

Buttons

- Perform actions on pages
- Drill through to a new page
- Navigate to a specific page/URL
- Select a bookmark
- Progressive disclosure



Progressive disclosure

Wake County Watchdog
FY 2019 Over Budget

\$108.36M

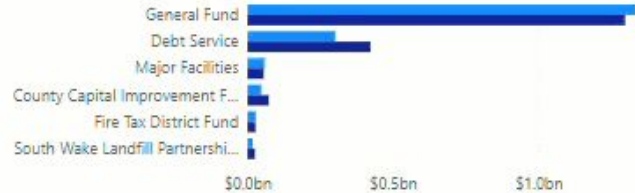
Amount Over Budget

Select Dept: Public Safety CIP Fire Apparatus

Department	Budget	Contractual Services	Salaries
Automation CIP	OTB	\$4,031,088	
Behavioral Health - Managed Care Organization	OTB	\$26,350,381	
Board Of Commissioners	OTB	\$10,383	\$565,220
Board Of Elections	OTB	\$2,062,795	\$1,885,966
Budget and Management Services	OTB	\$15,728	\$954,339
Capital Area Workforce Development	OTB	\$4,468,932	\$1,163,891
Shared with me	OTB		
County of Identification	OTB	\$148,605	\$5,577,427
Communications Office	OTB	\$49,340	\$872,828
Community Capital Projects	OTB		
Community Services	OTB	\$883,939	\$26,116,923
County Attorney	OTB	\$19,246	\$2,632,653
County Building Improvements	OTB	\$219,949	

Budgets versus Actuals by Fund

● Budgeted Amount ● Actual Amount



Public Service Expenditures

● Emergency ● Fire ● Sheriff



Progressive disclosure

Wake County Watchdog
FY 2019 Over Budget

\$108.36M
Amount Over Budget



Show Departments



Main design components

Audience



- Who will be using the report?
- What are their needs?
- What format is suitable for the audience?
- How often will it be accessed?

Components



- Purpose: exploratory versus explanatory
- Format: horizontal versus vertical
- Layout: grid versus flex
- Visuals: values, dimensions, shapes



Dashboard or report?

“A machine worker needs to monitor temperatures in real time.”





Dashboard or report?

“The Accounting department wants the ability to drill into invoices, interacting heavily with Power BI elements.”





Dashboard or report?

“A data analyst wishes to provide a “guided tour” experience for the C-Suite to review annual results.”





Dashboard or report?

“The CEO wants to track sales measures and the company's stock price over the course of the day on his mobile phone.”

