Report Design Best Practices in Power BI

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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

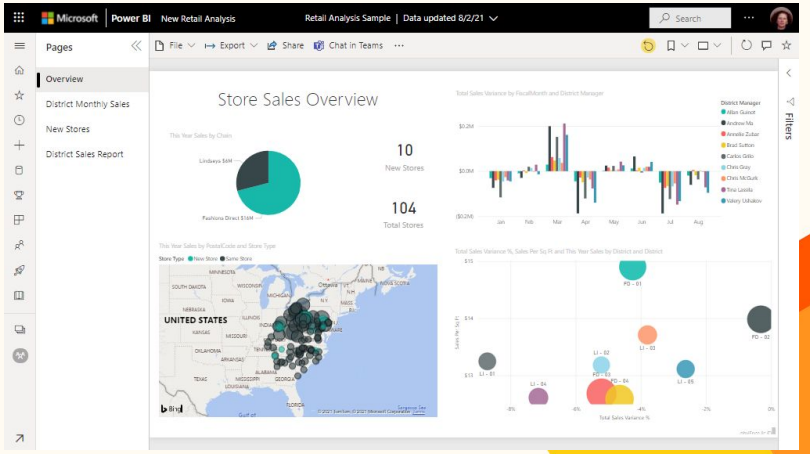
Power BI dashboards vs. reports

Power BI Dashboard

- Fast analysis
- Limited interactivity

Power BI Report

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



Navigating a report

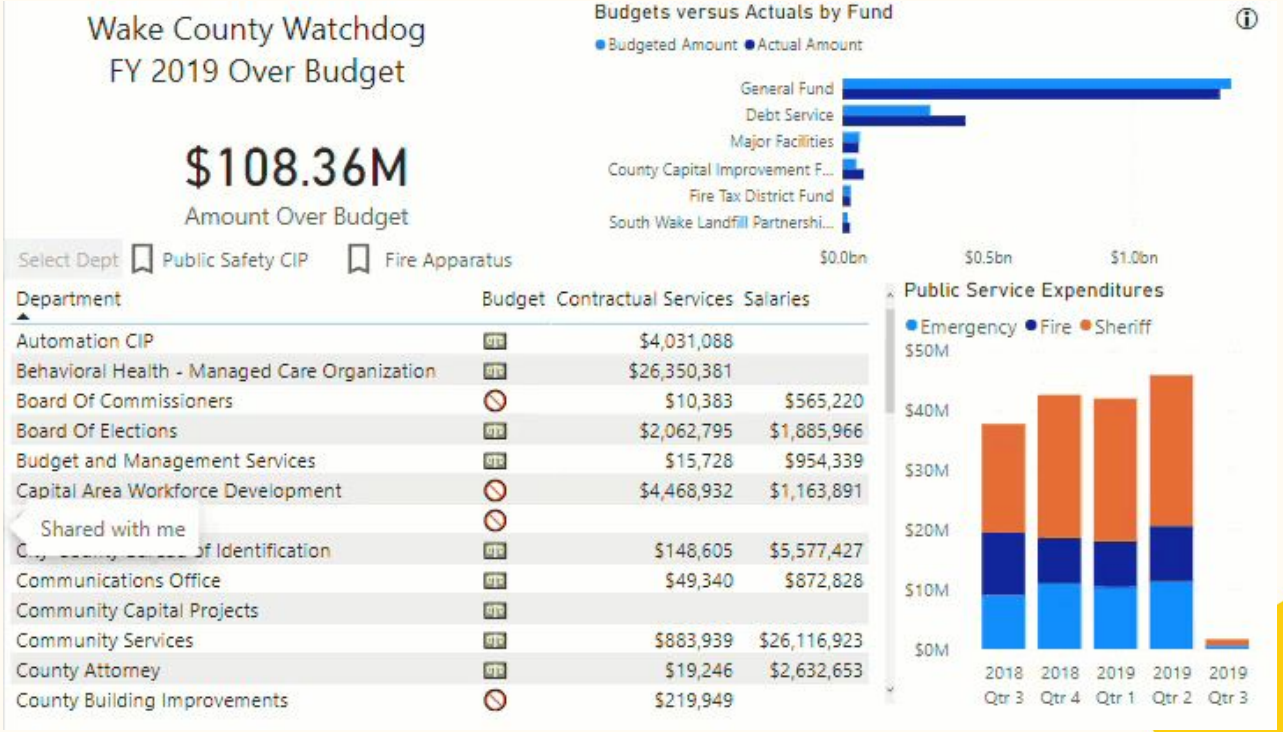
Bookmarks

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

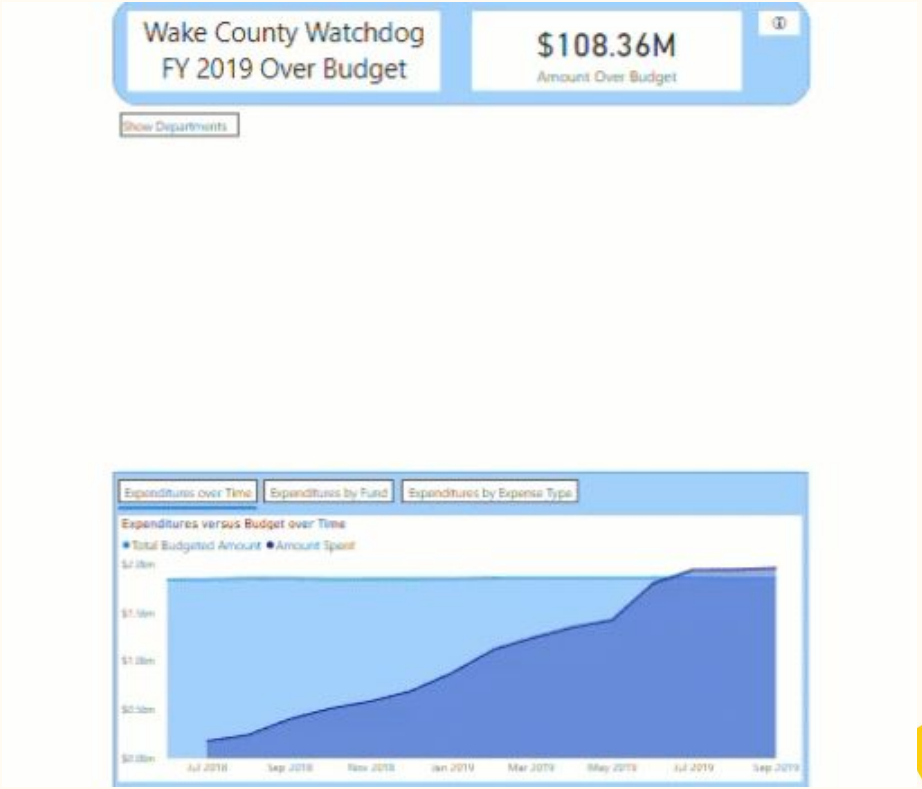
Buttons

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

Progressive disclosure



Progressive disclosure



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.”