# Report Design
# CHEAT SHEET

Refer to this curated list of essential ***report design best practices*** for a quick and easy way to perfect your work.

## DATA

Include only necessary detail. If the report is too long, consider applying filters to narrow the output.

| EMPLOYEE SALES | |
|---|---|
| Buchanan | $168.00 |
| Callahan | **$7,549.00** |
| Davalio | **$1,203.00** |
| Dodsworth | $209.16 |
| Fuller | $83.45 |

Use conditional formatting to draw attention to trends and irregularities in the data.

| | |
|---|---|
| | $XXX.XX |
| | $XXX.XX |
| **Dept. Total:** | **$XXX.XX** |
| **Company Total:** | **$XXX.XX** |

Place subtotals in group footers and grand totals in report footers.

| | | |
|---|---|---|
| **Footer: Employees** | **=aggcount ({Orders. OrderID})** | |

Place charts and visualizations in the footer corresponding to the data they contain.

| SALES | |
|---|---|
| Buchanan | $168.00 |
| Callahan | $749.00 |
| Davalio | $103.00 |
| Dodsworth | $209.16 |
| Fuller | $83.45 |
| King | $415.98 |

If distributing the report in HTML format, consider making additional detail available through drilldowns.

Sort the report in a manner that would be most intuitive and useful to the intended audience.

Place the date and time in a report or page header/ footer so readers know how fresh the data is.

Keep readers informed by including a report summary that lists which sorts and filters have been applied.

| 1 | Categories. Category Name | =aggSum({OrderDetails.Quantity}*{OrderDetails.UnitPrice}) |
|---|---|---|
| 2 | | |

Suppress any rows or columns used strictly for calculation so that they do not appear in the report output.

| Report Header | 1 | PRODUCT SALES |
|---|---|---|

Place the report title in the report header section.

ACME COMPANY SALES
ACME COMPANY SALES
ACME COMPANY SALES
Lorem ipsum

If a group's detail section spans more than one page, set the group header to repeat at the top of each page for easy reference.

Place page number and owner/copyright information in the page footer or page header sections.

*1*

Be sure to include units and currency symbols where applicable.

## STYLE

| | |
|---|---|
| Callahan | $12,987.00 |
| Stevens | $158.26 |
| Davis | $286.36 |

Align currency and other numeric values to the right.

Align text values to the left unless they're in languages read from the right.

| SALES | | |
|---|---|---|
| Lorem isum | 19% | $125 |
| Lorem ium | 57% | $855 |
| Lor ipum | 71% | $421 |
| Lond apoum | 99% | $137 |

Apply color sparingly. Rely more on shades than on hues.

Use color to draw attention to important values and to make it easier to navigate the report.

| SALES | | |
|---|---|---|
| Lorem ipsum | 19% | $125 |
| Lorem ium | 57% | $855 |
| Lor ipum | 71% | $421 |
| Lond apoum | 99% | $137 |
| Lor ipum | 56% | $820 |

| Category | |
|---|---|
| Employee | |
| Lorem | Lorem |
| XX | XXXX |
| XXXX | XX |
| XX | XXXX |

Indent subgroups or apply other styling to make the report easier to scan.

| SALES | | |
|---|---|---|
| Lorem ipsum | 59% | $125 |
| Loresum | 57% | $855 |
| Trem ipsum | 71% | $421 |
| Lorem ipsum | 99% | $137 |

Go without gridlines if your columns and rows are already easily distinguished from one another.

| | | |
|---|---|---|
| Lorem isum | 19% | $125 |
| Lorem ium | 57% | $855 |
| Lor ipum | 71% | $421 |
| Lond apoum | 99% | $137 |
| Lor ipum | 56% | $820 |

If using gridlines, make them lighter than your report detail for a cleaner look.

27% ▲
49% ▼

Avoid using green and red in your report unless they are meant to signify good and bad respectively.

Show row totals in the rightmost column and column totals in the bottommost row for a given group or subgroup.

| | | |
|---|---|---|
| Lorem ipsum | 19% | $125 |
| Lorem ipsum | 57% | $855 |
| Lorem ipsum | 71% | $421 |
| Lorem ipsum | 99% | $137 |
| Lorem ipsum | 56% | $820 |
| | TOTAL: | $XXX |

| SALES | | |
|---|---|---|
| Lorem ipsum | 59% | $125 |
| Loresum | 57% | $855 |
| Trem ipsum | 71% | $421 |
| Lorem ipsum | 99% | $137 |

Consider colorblind viewers and adjust accordingly.

If distributing the report in document format, consider how many columns will comfortably fit on each page.

Try alternate row shading instead of gridlines.

| SALES | |
|---|---|
| Lorem isum | 19% |
| Lorem ium | 57% |
| Lor ipum | 71% |
| Lond apoum | 99% |
| Lorem ium | 57% |

If emphasizing row totals, consider going without vertical gridlines.

If emphasizing column totals, consider going without row gridlines.

## EDITING

***$47,365.00***
***£13,627.30***

Make sure all dates, numbers, and currencies are correctly formatted.

Run the report periodically to see how the changes you've made appear in the output.

Test the report on a member of the intended audience. Do they find any part of it confusing or incomplete?

SALES REPORT
Lorem ipsum
TOTAL: $XXX

Squint at the report from a short distance and notice which elements stand out. Is it easy to discern the report's structure?

SALES REPORT
Lorem ipsum
TOTAL: $XXX

Ask a colleague to locate a few figures or data points in the report. Were they easy or difficult to find?

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