

Power BI Introduction



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Power BI is a business analytics service provided by Microsoft. It provides interactive visualizations with self-service business intelligence capabilities, where end users can create reports and dashboards by themselves, without having to depend on any information technology staff or database administrator.

The course runs from 9.30 am to approximately 4.30 pm.

Duration: 1-2 day Intro.

Day 1

Getting Started

Power BI Editions, The three key elements of Power BI, Dashboards, reports and datasets, Exploring the Power BI sample data sets

Connecting to File Sources

Connecting to CSV files, Connecting to Excel data, Importing Excel data, Connecting to a folder of data

Connecting to Web Sources

Recognizing standard text formats, Using web preview, Connecting to web tables, connecting to a SharePoint list

Connecting to Databases

Connecting to Microsoft Access data files, Connecting to Access online data sources, Connecting to SQL Server, Making a live connection to SQL Server

Cleaning up and transforming data

Using the Query Editor, Understanding query steps, Renaming columns, Reordering and deleting columns, Changing data types, Unpivot Columns, Replace Values, Append Queries, Merge Queries, Grouping data

Parameters and templates

Parameterization of data sources, Using parameters when transforming data, Creating Power BI templates

Data modelling

Automatic detection of relationships, Defining relationships manually, Cross filter direction, Creating calculated columns, Creating measures, Creating calculated tables, Creating hierarchies, Writing DAX functions

Creating Visualizations

Creating and populating visualizations, Formatting visualizations, Tooltips, Moving and aligning visualizations, Duplicating visualizations, Adding logos and images, Adding text and hyperlinks

Big picture Visualizations

Cards and gauges, Using slicers, Using filters, Understanding visual level, page level and report level filters, Specifying visual interactions

Granular Visualizations

Creating column and bar charts, Creating line and area charts, Creating scatter charts, Treemap visualizations, Using charts as slicers, Creating drill-down experiences

“A highly professional company run by knowledgeable, friendly people”



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Our bespoke onsite courses run from 9:30am to 4:30pm with an hour for lunch. The trainer will arrive in time to check and help with your set up. If you need to amend these timings just let us know in advance and we will work around what suits you.

Day 2

Using Context Manipulation Functions

Understanding row context, Understanding filter context, The SUMX function, The ALL function, The FILTER function, The CALCULATE function

Using Table Functions

The COUNTROWS function, The DISTINCT function
Using Time Intelligence Functions
Creating a date table, The TOTALYTD function

Geo Visualizations

Using maps with geographical data

Analytics

Adding trendlines, Adding reference lines

Using Custom Visuals

Obtaining custom visuals, Chiclet Slicer, Hierarchy Slicer, Pulse Chart, Synoptic Panel by SQLBI

Creating Reports and Dashboards

Creating multipage reports, Publishing Power BI Desktop reports, Creating dashboards, Printing and exporting dashboards and reports, Getting Quick Insights

Publishing content

Creating Groups in the Power BI service, Creating content Packs, Assigning groups to content packs, Sharing dashboards with your organization, Publishing reports to the web, Embedding a report in a web page, Embedding a report in a SharePoint page

Consuming and customizing content

Browsing group content, Using content packs, Creating read-only versions, Querying with natural language, Creating custom Q & A suggestions

Refreshing content

Setting up a personal gateway, Customizing dataset refresh settings, Scheduling a refresh frequency, Setting up enterprise gateways, Managing enterprise gateways, Adding and removing data sources, Creating live connections to data, Using row level security

Discuss your own projects

Discussion of reports and visualizations currently being worked on by yourself and your colleagues