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## **Microsoft Power BI – Introduction Training**

### Overview & Learning Outcomes

The training course - [Introduction to Power BI](#) - is designed for Analysts, Managers, Report Creators and Excel users who would like to create powerful interactive dashboards and custom reports, and to analyse business data and share insights.

Completing this course will give you the skills to create rich dashboards, available on every device, that will allow you to monitor your business and get answers quickly.

Upon completion of this course you should be able to:

- Understand why Business Intelligence and Data Analytics are important
- Understand the Power BI Service, Desktop and Mobile
- Import data from an Excel workbook
- Understand Data Transformation, Power Query & Data Modelling
- What you can calculate using DAX
- Create and work with visualisations
- Visualisations to Reports
- Visual Interactions & using Custom Visuals
- Activate Quick Insights
- Power BI Desktop & Service Features
- Work with Databases and Power BI
- Working with Dashboards
- Natural Language Query

### Prerequisites

The training course - [Introduction to Power BI](#) - assumes little or no knowledge of the Power BI software. Some expertise in Microsoft Excel is necessary, especially Pivot Tables and VLOOKUP.

### Duration:

1 Day

### Courseware:

High quality learning materials are available for purchase by participants.

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## **Microsoft Power BI - Introduction** **Training Course Outline**

### **Understanding Business Intelligence**

Why is Data Analytics Important?  
Why is conventional Data Analysis Process inefficient?  
What is Business Intelligence?  
Steps & concepts involved in Business Intelligence  
Other BI Tools in the Market  
What is Self Service BI?

### **Understanding Power BI**

Power BI (Desktop Vs Mobile Vs Service)  
Licenses (Free Vs Pro Vs Premium)  
What makes Power BI different from other BI Tools?  
Frequent Updates and Changes  
BI Steps in Power BI  
Languages Involved in Power BI (Power Query, DAX)

### **Getting Started with Power BI**

Setting up Office 365 Enterprise E3 trial account  
Signing up for Power BI  
Upgrading to Power BI PRO  
Downloading Power BI Desktop

### **Getting Data into Power BI Desktop**

Understanding Power BI Navigation  
Exploring Different Data Sources in Power BI  
Getting Data from Web  
Getting Data from Azure SQL Data base  
Getting Data from Azure SQL Database using SQL statement  
Getting Data from Access File  
Getting Data from Excel

### **Data Transformation**

Navigating Query Editor  
What is Query?  
What is Data Transformation?  
Removing empty rows  
Removing irrelevant Columns  
Renaming Columns

Changing Data Types  
Duplicating Columns  
Splitting Columns  
Merging Columns  
Correcting Spelling Mistakes  
Changing cases  
Trimming & Cleaning

### **Introduction to Power Query (M Formula Language)**

Exploring Applied Steps  
Introducing idea of repeatable workflows  
Updating Applied Steps  
Deleting Applied Steps  
Renaming Applied Steps  
Understanding the Code behind every step  
Automating Data Transformation process via repeatable workflows  
Exploring Advanced Editor  
Loading and Applying Data

### **Data Modelling**

Understand Navigation of Relationship view  
What is Data Model?  
What is a unique Identifier?  
Creating a new relationship  
Editing a relationship  
Updating a relationship  
Understanding Cardinality  
Understanding Cross Filter Direction  
Why is Data Model more efficient than a Flattened Data Set?

### **Introduction to DAX**

What can we calculate using DAX?  
What are Calculated Columns and Calculated Measure?  
How is DAX different from Excel Functions?  
Calculating a column using DAX  
Calculating a measure using DAX  
Formatting Data types  
Changing property of a Data Type

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### Data Visualization

- Understand Navigation of Report View
- Creating a Bar Chart
- Formatting a Bar Chart
- Changing Chart Type
- Creating and Formatting a Column Chart
- Creating and Formatting a Line Chart
- Creating and Formatting a Pie Chart
- Creating and Formatting a Tree Chart
- Creating and Formatting a Card
- Creating and Formatting a Matrix
- Creating and Formatting a Table
- Creating and Formatting BubbleMap Visualization
- Creating a Filled Map Visualization

### Creating Custom Visuals

- Getting Custom Visuals from the Store
- Creating Sankey Chart
- Creating Radar Chart

### Visual Interaction

- Understanding Visual Interaction
- Turning visual interaction on and off

### Exploring Filters

- Cross Filtering through visuals
- Creating a slicer
- Visual level filter
- Page Level Filter
- Report Level Filter
- Drill through filter
- Top N Filter

### Creating Custom Slicers

- Getting Custom Slicer from Store
- Creating Enlighten Word Flag Slicer
- Creating Chiclet Slicer
- Inserting Images in Chiclet Slicer

### Exploring Power BI Desktop Features

- Exploring visual options (focus mode, show data, spotlight, export)
- Create and Duplicate New Pages
- Create image, text boxes and shapes
- Switch between phone and web layout
- Save the report
- Print the report
- Publish report to Power Bi Service

### Power Bi service Features

- Log in to Power Bi Service
- Understand Navigation
- Opening and Editing your report in Power BI service
- Publishing to web
- Converting report to a Power Point
- Generating a QR Code
- How to get Data directly into Power Bi Service
- Importing Data Vs Uploading Data

### Dashboards

- Pin visuals from report to dashboard
- The difference between report and dashboard
- Why visual interaction isn't supported in Dashboards
- Resizing and moving a visual
- Creating a video tile
- Creating an image tile
- Applying alert on Card
- Pinning complete report to Dashboard
- Customizing dashboard for mobile view
- Sharing dashboard with colleagues
- Viewing Shared Reports

### Natural Language Query

- What is NLQ and why is it a breakthrough
- Create a Card using NLQ
- Create a Table Using NLQ
- Create Bar Visual Using NLQ
- Pin the visuals directly to your dashboard

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### **Power Bi publisher for Excel**

- Installing the Add-in
- Activating this Add-in in Excel
- Connect your Excel Workbook with Power Bi
- Pin a chart from Excel to Power Bi Dashboard
- Pin a pivot table from Excel to Power Bi Dashboard
- Update the Chart in Power Bi Dashboard from Excel

### **Quick Insights**

- What is Quick Insight Tool?
- How to create quick insights of a dataset
- Explore visuals created by this option
- Pin a visual to dashboard

### **Sample Reports and Dashboard**

- Getting the Sample reports and Dashboard
- How samples are very helpful?
- Editing sample reports and dashboard

### **Power Bi mobile**

- Downloading the Power BI mobile app & logging in
- Understand Navigation
- How to see underlying reports
- Annotate visuals and share using other apps
- How to see our own dashboard
- How to see dashboard shared with us
- See report using QR scanner
- Exploring mobile sample reports

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