COURSE OVERVIEW

BI-EU
MICROSOFT POWER BI FOR END USERS
COURSE DURATION: 1 DAY

OVERVIEW

Aim

The Microsoft Power BI collection of software, apps, and services helps analyse your organization's data and uncover insights and trends. This course will show you how to link and model data in Power BI and create visual reports that reveal data insights.

Although the Power BI desktop client will be the primary focus, an introduction to the Power BI web app will also be provided.

Key areas covered include:

- ✓ The purposes and basic functions of the core Power BI components
- ✓ Connecting to a data source using either the Power BI desktop client or the web app
- ✓ ·Creating reports and visualizations
- ✓ Using the Power BI desktop client and web app
- ✓ ·Modelling data

Lesson 1: Getting Started

TOPIC A: An Introduction to Power BI

- ✓ WHAT IS POWER BI?
- ✓ THE BUILDING BLOCKS OF POWER BI
- ✓ ACTIVITY 1-1: AN INTRODUCTION TO POWER BI
- ✓ THE POWER BI DESKTOP INTERFACE
- ✓ MPORTANT INFORMATION ABOUT POWER BI UPDATES

TOPIC B: Working with Power BI Desktop Files

- ✓ OPENING FILES
- ✓ SAVING FILES
- ✓ CREATING A NEW FILE
- ✓ PUBLISHING TO THE POWER BI WEB APP
- ✓ ACTIVITY 1-2: WORKING WITH POWER BI DESKTOP FILES

TOPIC C: Connecting to Data Sources with Power BI Desktop

- ✓ CONNECTING TO AN EXCEL WORKBOOK
- ✓ CONNECTING TO AN ACCESS DATABASE
- ✓ VIEWING ALL CONNECTION OPTIONS
- ✓ CREATING A MANUAL DATASET
- ✓ MANAGING DATA SOURCES
- ✓ ACTIVITY 1-3: CONNECTING TO DATA SOURCES WITH POWER BI DESKTOP

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TOPIC D: Creating a Report with Visualizations

- ✓ USING THE VISUALIZATIONS PANE
- ✓ USING THE FIELDS PANE
- ✓ CREATING A VISUALIZATION
- ✓ INTERACTING WITH VISUALIZATIONS
- ✓ CHANGING THE VISUALIZATION TYPE
- ✓ MOVING AND RESIZING VISUALIZATIONS
- ✓ ACTIVITY 1-4: CREATING A REPORT WITH VISUALIZATIONS

TOPIC E: Doing More with Visualizations

- ✓ FORMATTING VISUALIZATIONS
- ✓ VIEWING VISUALIZATION DATA
- ✓ USING FOCUS MODE AND SPOTLIGHT
- ✓ REVIEW QUESTIONS
- ✓ REMOVING A VISUALIZATION
- ✓ ACTIVITY 1-5: DOING MORE WITH VISUALIZATIONS
- ✓ ·SUMMARY

Lesson 2: Working with Data
TOPIC A: Transforming and Sanitizing Data

- ✓ USING DATA VIEW
- ✓ CLEANING IRREGULARLY FORMATTED DATA
- ✓ SORTING TABLE DATA
- ✓ MANAGING COLUMNS

TOPIC B: Using the Query Editor

- ✓ OPENING THE QUERY EDITOR
- ✓ THE QUERY EDITOR INTERFACE
- ✓ USING THE QUERY SETTINGS PANE
- ✓ USING MERGE QUERIES
- ✓ USING APPEND QUERIES
- ✓ ACTIVITY 2-2: USING THE QUERY EDITOR

TOPIC C: Data Modelling

- ✓ WHAT IS DAX?
- ✓ CREATING A NEW TABLE
- ✓ CREATING A NEW CALCULATED COLUMN
- ✓ CREATING A NEW MEASURE
- ✓ ACTIVITY 2-3: DATA MODELLING

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TOPIC D: Managing Relationships

- ✓ USING THE RELATIONSHIPS VIEW
- ✓ CREATING RELATIONSHIPS
- ✓ EDITING RELATIONSHIPS
- ✓ DELETING RELATIONSHIPS
- ✓ USING THE MANAGE RELATIONSHIPS DIALOG
- ✓ ACTIVITY 2-4: MANAGING RELATIONSHIPS
- ✓ SUMMARY
- ✓ REVIEW QUESTIONS

Lesson 3: Working with Reports and Visualizations
TOPIC A: Managing Report Pages

- ✓ NAVIGATING THROUGH PAGES
- ✓ SHOWING AND HIDING PAGES
- ✓ ADDING PAGES
- ✓ DELETING PAGES
- ✓ RENAMING PAGES
- ✓ CHANGING PAGE ORDER
- ✓ ACTIVITY 3-1: MANAGING REPORT PAGES

TOPIC B: Changing Report View Options

- ✓ SETTING PAGE VIEW OPTIONS
- ✓ CUSTOMIZING YOUR VIEW
- ✓ USING PHONE VS. DESKTOP LAYOUT
- ✓ ACTIVITY 3-2: CHANGING REPORT VIEW OPTIONS

TOPIC C: Working with Visualizations

- ✓ UNDERSTANDING DRILL THROUGH OPTIONS
- ✓ CHANGING CATEGORY AND SUMMARIZATION OPTIONS
- ✓ ARRANGING VISUALIZATIONS
- ✓ EDITING INTERACTIONS
- ✓ ABOUT CUSTOM VISUALIZATIONS
- ✓ ACTIVITY 3-3: WORKING WITH VISUALIZATIONS

TOPIC D: Adding Static Objects to a Report

- ✓ INSERTING PICTURES
- ✓ INSERTING TEXT BOXES
- ✓ INSERTING SHAPES
- ✓ WORKING WITH STATIC OBJECTS
- ✓ ACTIVITY 3-4: ADDING STATIC OBJECTS TO A REPORT
- ✓ SUMMARY
- ✓ REVIEW QUESTIONS

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Lesson 4: A Closer Look at Visualizations
TOPIC A: Matrixes, Tables, and Charts

- ✓ CREATING A TABLE
- ✓ CREATING A MATRIX
- ✓ OVERVIEW OF CHART TYPES
- ✓ CREATING CHARTS
- ✓ ACTIVITY 4-1: MATRICES, TABLES, AND CHARTS

TOPIC B: Maps

- ✓ CREATING A TREE MAP
- ✓ CREATING A BUBBLE MAP
- ✓ CREATING A FILLED MAP
- ✓ ACTIVITY 4-2: MAPS

TOPIC C: Cards, Gauges, and KPIs

- ✓ CREATING A CARD
- ✓ CREATING A GAUGE
- ✓ CREATING A KPI
- ✓ ACTIVITY 4-3: CARDS, GAUGES, AND KPIS

TOPIC D: Slicers

- ✓ CREATING A SLICER
- ✓ USING SLICERS
- ✓ CUSTOMIZING SLICER DISPLAY
- ✓ CHANGING SLICER MODE
- ✓ CHANGING SLICER ORIENTATION
- ✓ ACTIVITY 4-4: SLICERS
- ✓ SUMMARY
- ✓ REVIEW QUESTIONS

Lesson 5: Introduction to the Power BI Web App
TOPIC A: Getting Started

- ✓ OPENING THE POWER BI WEB APP
- ✓ THE WEB APP INTERFACE
- ✓ WEB APP BUILDING BLOCKS
- ✓ KEY DIFFERENCES
- ✓ ACTIVITY 5-1: GETTING STARTED

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TOPIC B: Connecting to Data Sources with the Power BI Web App

- ✓ CONNECTING TO LOCAL DATA
- ✓ CONNECTING TO LIVE DATA
- ✓ ACTIVITY 5-2: CONNECTING TO DATA SOURCES WITH THE POWER BI APP
- ✓ CONNECTING TO CONTENT PACKS
- ✓ CONNECTING TO SAMPLES

TOPIC C: Using Workspaces, Dashboards, and Reports

- ✓ VIEWING AND MANAGING POWER BI CONTENT
- ✓ VIEWING A WORKSPACE
- ✓ ACTIVITY 5-3: USING WORKSPACES, DASHBOARDS, AND REPORTS
- ✓ VIEWING DASHBOARDS AND REPORTS
- ✓ MANAGING REPORTS

TOPIC D: Creating Custom Dashboards

- ✓ CREATING A DASHBOARD
- ✓ PINNING VISUALIZATIONS TO A DASHBOARD
- ✓ ADDING CUSTOM TILES
- ✓ MANAGING DASHBOARDS
- ✓ ACTIVITY 5-4: CREATING CUSTOM DASHBOARDS

TOPIC E: Power BI Web App Features

- ✓ USING INSIGHTS
- ✓ USING Q & A
- ✓ CUSTOMIZING Q & A SUGGESTIONS
- ✓ ACTIVITY 5-5: POWER BI WEB APP FEATURES
- ✓ SUMMARY
- ✓ REVIEW QUESTIONS