2 Day Power BI Training Agenda

Day 1

Overview of Power BI

- The Value Offering
- Licensing and Pricing
- Market Positioning

Power BI Cloud Service (the wow features)

- Overview of the Cloud Service
- Role and Functionality for Consumers
- Building a CFO Dashboard
- Dashboard Flow and Navigation
- Power BI for Mobile
- How to use Q&A (Natural Language Queries)
- Obtaining Value from Quick Insights
- Connecting to Services
- Using the Demo Samples
- Publish to web (Embedded View)
- Exporting Reports to PowerPoint

Importing and Transforming Data

- Importing Data from various sources
- Using Direct Query
- Query Editor Overview
- Understanding Query Design & the ETL Process
- Query Building Best Practice
- Understanding Applied Steps
- Data Transformations
  - Cleaning data (covers many different methods)
  - Merging Datasets
  - Unpivoting Data
  - Combining Files from a Folder
  - Appending Datasets
  - Creating Columns from Examples

- Using a Dynamic Fiscal Calendar Table
- Creating & Using Parameters

Data Modelling

- Creating Relationships Between Tables
- Handling Multiple Relationships with the Fact Table
- Default Summarization of Fields
- Custom Sorting of Columns
- Data Types & Formatting
- Optimizing Q&A - Creating Data Synonyms

Power BI Desktop

- Overview of Power BI Desktop
- Similarities to Excel Power Pivot
- Similarities to Excel Power Query
- Technical Options & Settings
- Monthly Updates
- Introduction to Facts & Dimensions
- Data Modeling 101
- Building a Robust Star Schema

Report Building

- Build a Time Intelligence Report
- Introduction to DAX
- Understanding DAX Syntax
- Implicit Vs Explicit Measures
- Creating Calculated Measures & Calculated Columns
- Understanding Base Measures & Metrics
Day 2

Report Building (cont.)

• Commonly Used DAX Functions
  - Sum, Average, Count, DistinctCount
  - Time Intelligence (MTD, QTD, YTD, Prior Year)
  - Understanding Calculate and the filter context
  - IF, HasOneValue
  - Divide
  - UserRelationship
  - Blanks

• Optimizing Measures for Self-Service BI
• Copying and Moving Measures
• Using Quick Measures
  - Build a Monthly Trend Report
  - Dynamic Headings & Dates
  - Types of Slicers and Filters
  - Understanding KPI cards
  - Using Field, Format, Analytics Pane
  - Building Tabular Reports
  - Replicating Excel Pivot Tables
  - Types of Conditional Formatting
  - Optimizing the Matrix Layouts

Report Visualisations

• Choosing Visuals Based on Context
• Using Custom Visuals
• Optimizing the use of Maps
• Optimizing Waterfall Charts
• Getting Value from Scatter, Ribbon & Bullet Charts
• Moving away from 1 Dimensional Story-telling

Optimizing the Design

• Adding & Optimizing Tool Tips
• Using the Format Painter
• Visual Alignment Tips
• Custom Page Sizing
• Using Logos & Custom Icons
• Making Enhancements with Shapes and Lines
• Formatting Tips & Tricks
• Best Practice Guidelines and Development Tips
• Removing or Hiding Data Model Redundancies

Governance & Distribution

• Understanding Row Level Security
• Creating and Testing Security Roles
• Publishing Models to the Cloud Service
• Adding Users to Security Defined Roles
• Basic Sharing of Dashboards & Reports
• Creating App Workspaces
• Collaborating on Reports
• Publishing Organisational Apps for Distribution of Content
• Adding Users & Editing Workspaces
• Connecting to Apps
• Organisational Content Packs
• Role of a Power BI Cloud Service Administrator

Report Functionality

• Adding Drill-Downs
• Creating Drill-Through Reports
• Using Focus Mode
• Filtering Reports by Relative Dates
• Viewing the Underlying Data Driving a Visualization
• Customizing Report Visual Interactivity
• Exporting Data from Power BI
• Explain the Increase or Decrease in Visuals
• How to Create Historical Categorical Trends
• Build a Qty Shipped Vs Qty Sold Report
• Building Reports using Q&A
• Optimizing Report Slicers
• Building a Year Over Year Report
• Cross Highlighting or Cross Filtering

Data Refreshing

• Overview of the Data Gateway
• Scheduling Data Refreshes
• Refreshing On-Demand