DATA BEAR
Be Data Savvy

3 Day Power BI
TRAINING WORKSHOP
Be empowered to drive effective business change through data driven solutions. Create interactive reports, discover insights and share your findings throughout your organisation.

What to Expect?
In this 3 Day workshop, our structured Power BI Training course ensures that you have a deep understanding of the fundamental concepts required for building robust Power BI solutions. All exercises build on each other towards a logical end process. After learning to master the basics, Day 3 focus on how to further enhance your reports with some extending learning of some the newer rich features and functionality available in Power BI.

What to Bring?
BYO Windows OS Laptop - You must be able to connect to our wireless network and install the latest version of Power BI Desktop.

Duration:
3 days (21 hours)
9:30 am - 4:30 pm (each day)

Price:
Public Class
£1,795 + VAT per delegate
Remote Class
£1,346 + VAT per delegate

*Prices are discounted when more than one delegate from the same company attends

Contact Us:
+44 20 8720 6880
info@databear.com
About us

As a Microsoft Gold Partner in Data Analytics and also a Power BI partner, with a vertical focus on helping business become more data efficient through Power BI training and consulting, Data Bear has an established record of empowering originations with the skills and tools needed to drive their business further. Using latest technologies and best practice, the Data Bear team is dedicated to providing training and solutions that ultimately save time, increase profits and reduce stress.

Objectives

Learn how to:

Use best practice and fundamental report building concepts to optimize the value derived from Power BI.

- Bring data to life through a compelling story
- Create calculated measures and KPIs
- Apply Security Rules
- Share Content across the organization

Who is it For?

No previous Data Analysis Training Required!

This training is designed for end users or analysts who need to derive and share insights from business data.

We'll show you how, without needing former data analysis training or needing to learn another programming language, you can build and sharing useful Power BI reports and dashboards.

Is your organization deploying or already using Microsoft Power BI?

Do you need to learn best practices around Power BI?
Course Content

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 (Content Packs)
- 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

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

Data Modelling

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

Report Building

- Build a Time Example 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
  - Using a Safe Divide Function
  - UserRelationship Function
  - Using the Blank() Function

- 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 Formatting

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

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

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**

Data Refreshing

- Overview of the Data Gateway
- Scheduling Data Refreshes
- Refreshing On-Demand
Day 3

Advanced Report Building

Using What-if Analysis
- Understanding the What-if Parameter Concepts
- Build a What-if Analysis Report
- DAX: ‘GENERATESERIES’ & ‘SELECTEDVALUE’
- Showcasing Other Use Cases

Advanced Tabular Layouts
- Overcoming Layout Limitations with Custom Mapping
- Creating a Dynamic Mapping Table
- Adding Mapping Tables to the Data Model
- Custom Sorting of Reporting Rows
- Create a Basic Profit and Loss Report
- How to apply the concepts to personal data

Power BI Bookmarking
- Understanding the Value Offering
- Using Bookmarks for Presentations
- How to use Bookmarks to Enhance the Visual Story
- Switching Between Chart Types
- Use Buttons or Images with Bookmarks
- Creating a Report Menu Page with Bookmarks
- Consolidating Report Views onto a Single Page

Dynamic Row Level Security (RLS)
- Usage Scenarios
- Mapping User IDs to the data model
- DAX Functions for Returning Usernames
- Adding Roles in Power BI Desktop
- Assign Users to Power BI Security

Slicing Reports by Measures
- How to Switch between Comparison Metrics
- Creating Helper tables in Power BI
- How to Capture Slicer Selections with DAX
- Using the DAX ‘SWITCH’ Function
- Creating Dynamic Headers
- Showcasing Other Use Cases

Using Query Parameters and PBI Templates
- Creating Parameters
- Passing Parameters into Queries
- Creating Power BI Template Files
- Using Template Files with Query Parameters
- Changing Parameters from the cloud service

Filter Contexts with DAX
- Understanding the DAX Filter Context
- Filtering with ‘Calculate’
- Using the ‘FILTER’ Function
- Using the ‘ALL’ & ‘ALLEXPECT’ Function
- Using Relative and TopN Filters

Review of Best Practices
- Summarising key concepts
- Sharing a Power BI best practice ‘Cheat Sheet’
- Review of additional Power BI features (time permitting)
Why Choose Data Bear?

- Small classes - Limited to 10 delegates
- Includes a free restaurant lunch
- Step-by-step manual provided
- Free USB stick containing course files
- Over 40 5 Star Google Reviews
- Microsoft Power BI Partner

Vertical Focus

We’re a Power BI centric company, and a Microsoft Gold Partner, in Data Analytics with a vertical focus on empowering organisations with Power BI training and solutions that produce results.

Deep Domain Experience

Having helped numerous organisations overcome the obstacles to enhanced data efficiency and empowering them with the skills to adopt a ‘data culture’, the Data Bear team has many years of ‘real life’ experience in the ‘BI – trenches’. We don’t just show you what all the various buttons and knobs do. You can learn that from documentation. Drawing on a wealth of experience, based on developing and deploying numerous best practice BI solutions globally, we’ll teach you how to build a robust Power BI solution from the ground up, ensuring that, going forward, your team has the best practice foundation to continue the process of getting the right data into the right hands.

Long-Term Partnership

Our friendly team of trainers and consultants understand that applying the learning to your own environment and data might result in some new questions. Ensuring your team can continue to progress towards fulfilling organizational BI needs and goals, we provide continued support packages.

Quality

Quality Assurance — as a Microsoft Power BI partner, we have insight to all new Power BI update roll outs and we ensure that all our training content and best practices taught is up to date with latest Microsoft releases and new technology offerings.

Training Locations

United Kingdom  We offer regular Training courses in London and throughout the UK.

Remote  Through remote training, we empower organizations globally, regardless of their geographical location.