THE IN-HOUSE TRAINING COMPANY

Power BI – introduction (1 day)

Overview

This course provides a condensed yet balanced look at the process of analysing data in reports. It starts by showing you how to import and connect to data from source files, including Excel, CSV files, and a web page. It then focuses on the process of cleaning and shaping data.

A comprehensive part of this course looks at the creation of dashboard visuals, including charts, maps, and tables, and how to arrange those visuals on a page to produce dynamic, interactive dashboards. It also looks at publishing and sharing reports in the online Power BI service.

You will also learn how table relationships work in a Data Model, the basis of a Power BI report, and includes DAX (Data Analysis Expressions) calculations to enhance your visuals.

Learning objectives

The aim of this course is to provide an introduction to understanding the Power BI analysis process, by working hands-on with examples that will equip you with the necessary skills to start applying your learning straight away.

Who should attend?

Managers and others who need to use or create reports and tables to support business management and decision-making.

Course format

A very practical, interactive one-day session for a maximum group size of 8. Comprehensive materials provided, including exercise files and a unique step-by-step guide developed by the trainer specifically for this programme.

This course can be run remotely online or face-to-face onsite.

Expert trainer

Alan became a professional IT trainer in 1995, when on completion of an NVQ accreditation in IT, the organisation providing the course, Apex North London, asked if he would like to join their team, which he happily did. Alan went on to become a City & Guilds Assessor with them.

Alan now freelances and almost exclusively specialises in analytics using Microsoft Power BI as a platform, however he still provide clients with Excel training when requested to. His previous 25+ years within this sector includes both freelancing, and full time employment at various companies including, Lead Trainer at Go Courses, and Training Manager at Ultima Concepts.

See what some of the participants have said about the workshops he's delivered for us:

'Fantastic. Well-paced and easy to follow.'

'Great experience.'

'Very personable, relatable, patient and able to present complicated processes in an understandable way.'

'Friendly and good at checking people are up to speed.'

'Very good and explained and answered all questions.'

'Explains everything well.'

'Excellent teacher and very intelligent.'

'Very knowledgeable would love to have him again if there is another course – thank you.'

'Alan explains things very clearly and addresses issues on questions before they are visible. Thank you very much!'

Workshop outline

1   Getting started

- The Power BI Desktop ecosystem
- Power BI's four views

2   Importing files

- The process of importing files
- Import an Excel file
- Import a CSV file
- Import from the web
- Manage file connections

3   The Power Query Editor

- The process of cleaning data
- What are Applied Steps?
- Manage data types

4   Dashboard visuals

- What is data storytelling?
- Insert and format maps
- Insert and format charts

- Insert a table, matrix, and card

- Controlling data formats

- Highlighting key points

- Filter reports with slicers

5   The Power BI service

- The Power BI service ecosystem

- Pin visuals to a dashboard

- Share report dashboards

6   The data model

- Model relationships

- Relationship properties

7   DAX new columns

- New columns and measures

- Adding a new column calculation

8   Introduction measures

- Basics of DAX measures

- Insert a SUM function

- Adding measures to visuals

- Insert a COUNTROWS function

- DAX formula rules

9   The CALCULATE measure

- The syntax of CALCULATE

- Using a CALCULATE measure

10   Time intelligence

- Importance of a calendar table

- Time intelligence functions

- Insert a TOTALYTD function

- Viewing time intelligence visually

Any questions?

Please just give us a call on 01582 463463 – we're here to help!
Or visit www.theinhousetrainingcompany.com