



# Getting Started with Power BI



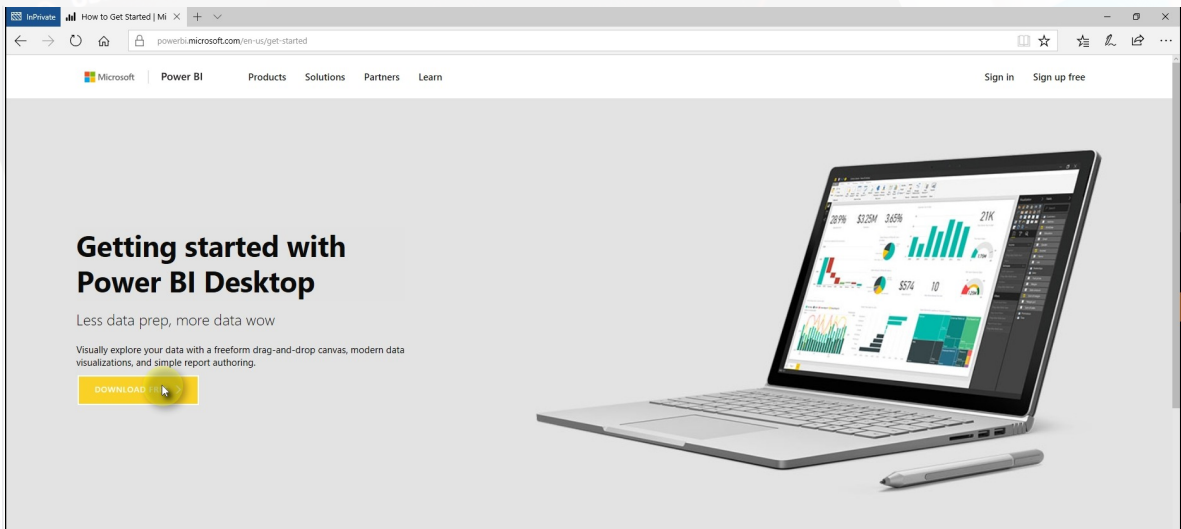
# Download Power BI Desktop



## Fast Track to Learning Power BI

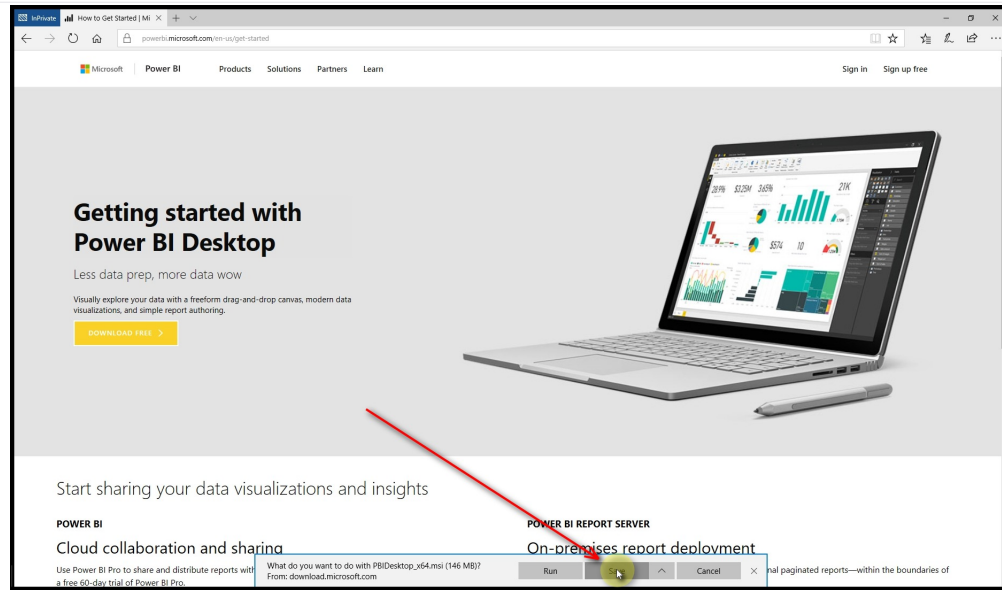
In this guide, learn how to get started with Power BI for your organization. We'll point out the most essential sections of the guided tour, as well as highlight key features of the Power BI applications so you can decide whether Power BI is right for your organization, and quickly become a master Power BI user.

If you have any questions along the way, please reach out to our team at [solutions@mcaconnect.com](mailto:solutions@mcaconnect.com).



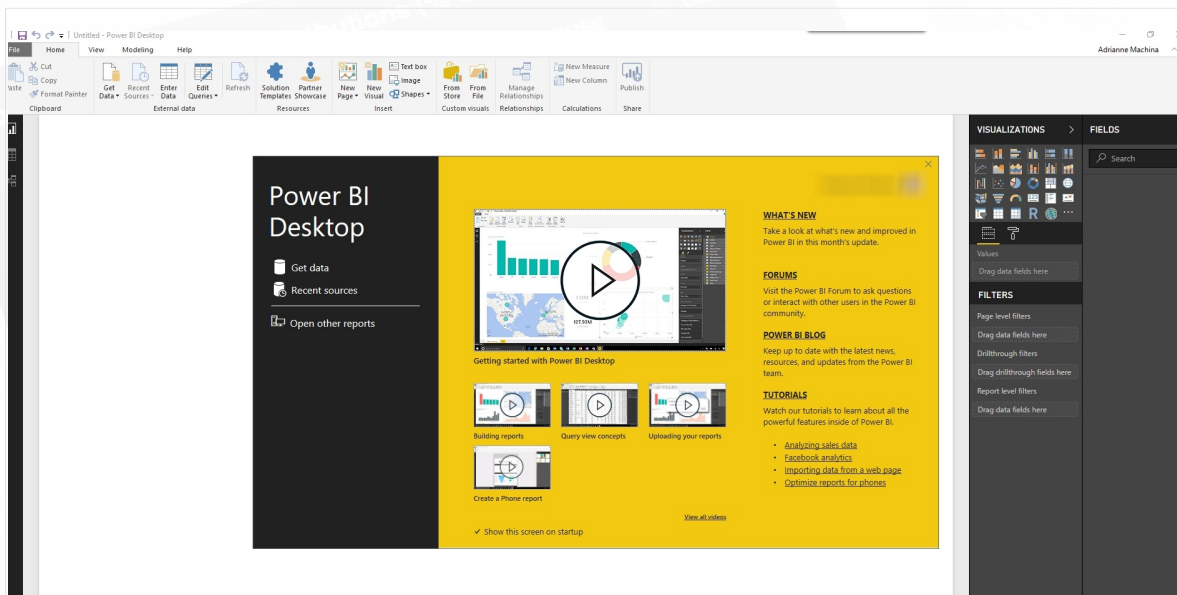
Click on "Download free" link

The American English version is available at <https://powerbi.microsoft.com/en-us/desktop/>.



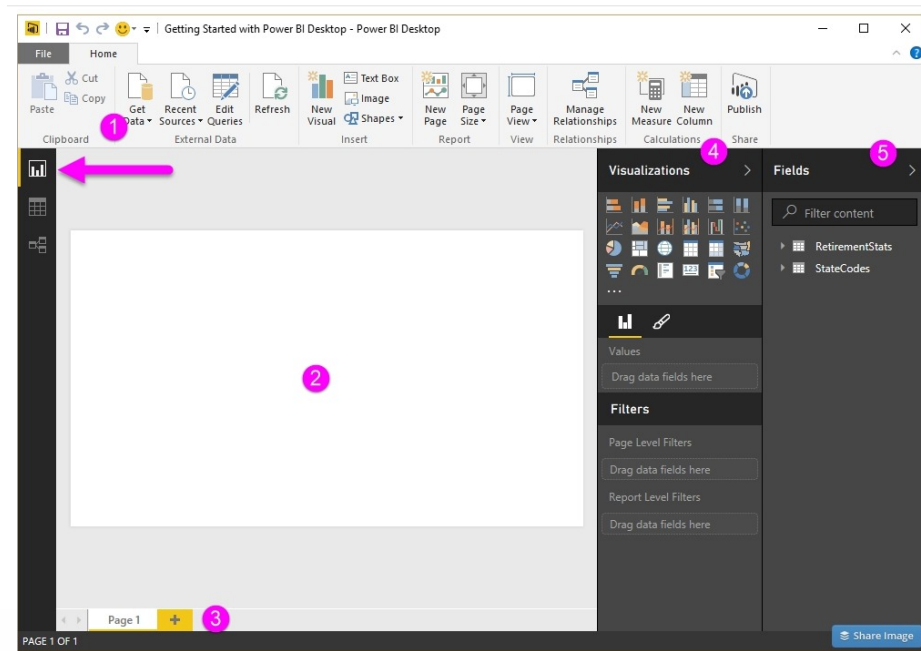
## “Save” or “Run” the Power BI application

You may have to turn off your pop-up blocker.



## Install Power BI

Run the setup wizard and login using your Microsoft Office 365 (Microsoft Dynamics) company account. You can see that Microsoft provides some quick start video guides when you launch the app for the first time.

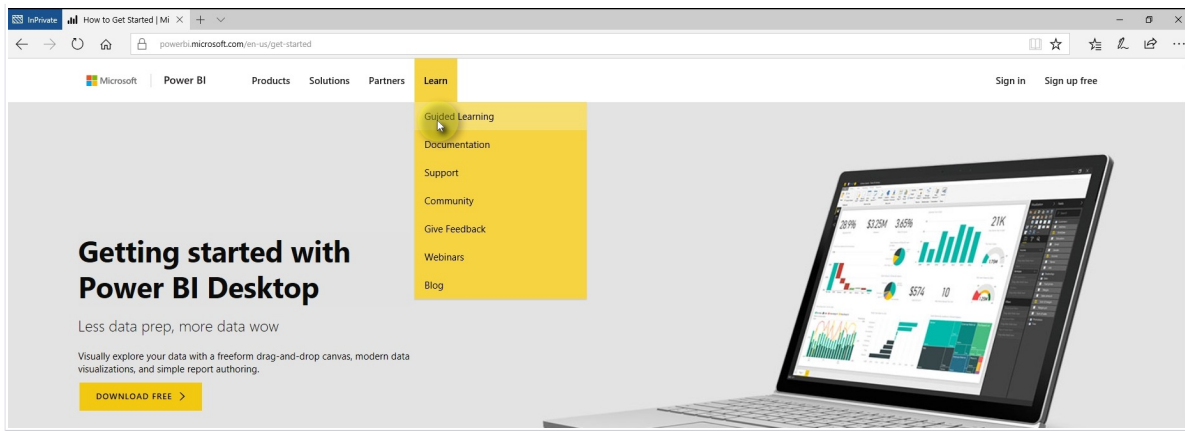


## Get Familiar with the Report View

The Report view is where you will spend your time building your reports and dashboards. This section has five main areas:

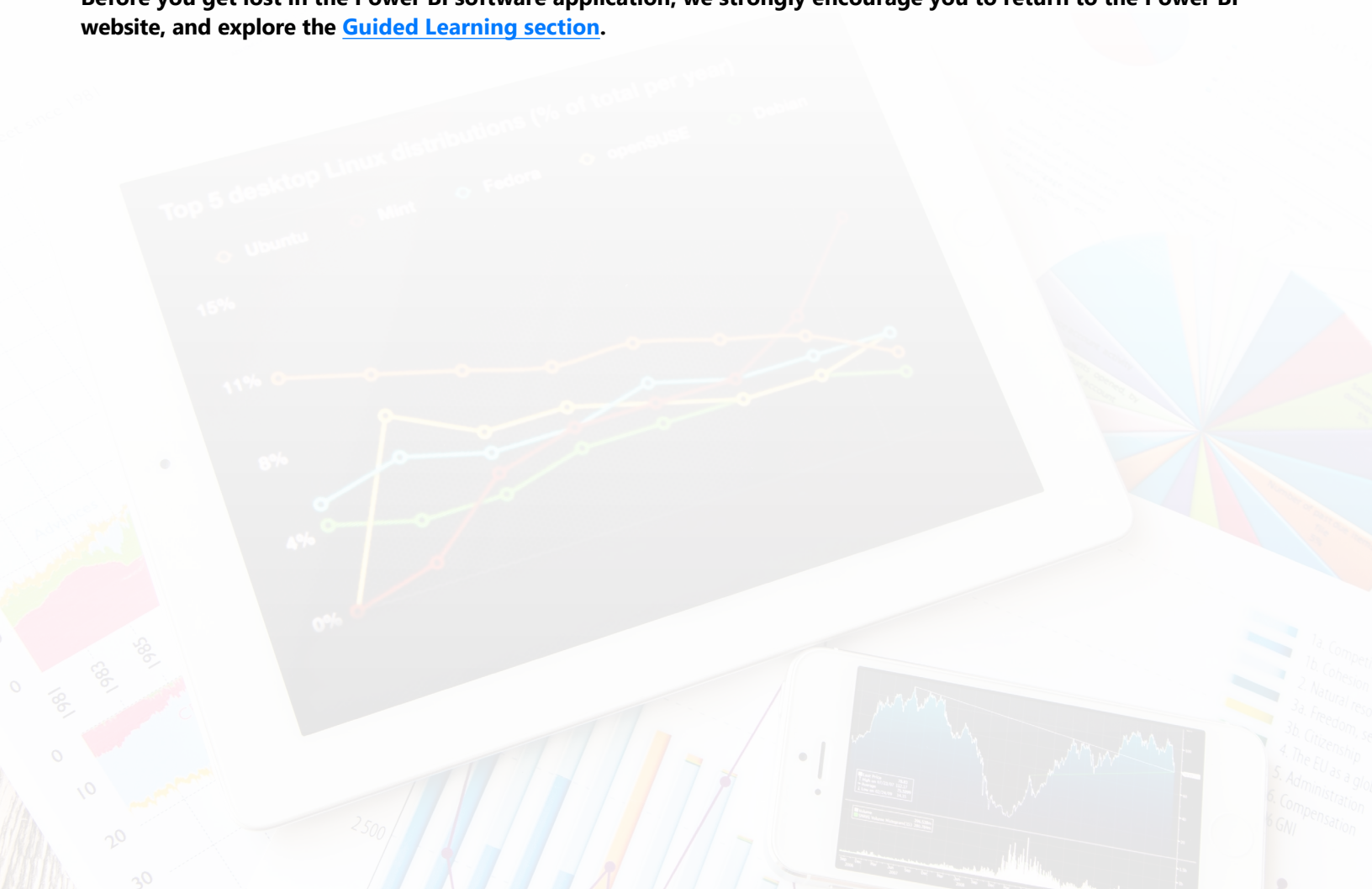
1. The Ribbon, which displays common tasks associated with reports and visualizations.
2. The Report view, or canvas, where visualizations are created and arranged.
3. The Pages tab area along the bottom, which lets you select or add a report page.
4. The Visualizations pane, where you can change visualizations, customize colors or axes, apply filters, drag fields, and more.
5. The Fields pane, where query elements and filters can be dragged onto the Report view, or dragged to the Filters area of the Visualizations pane.

# Guided Learning

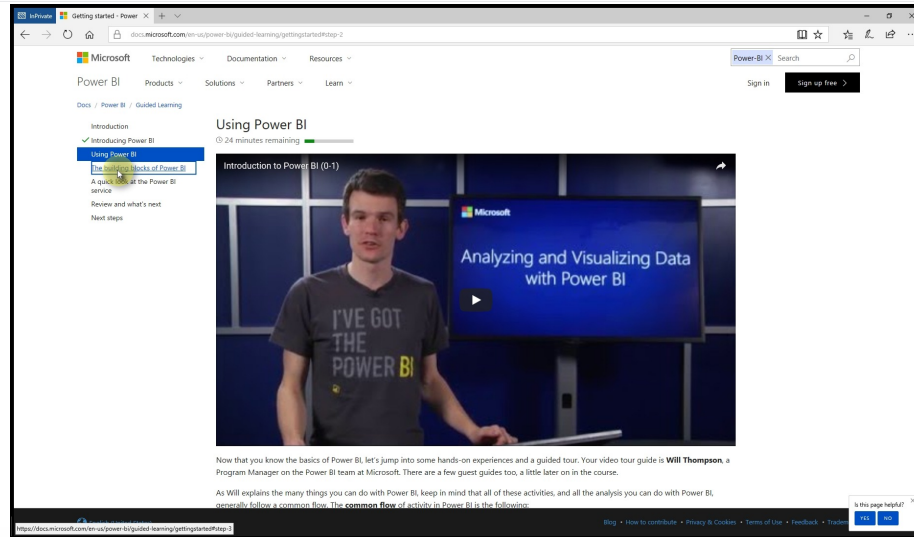


## Click Learn > Guided Learning

Before you get lost in the Power BI software application, we strongly encourage you to return to the Power BI website, and explore the [Guided Learning section](#).



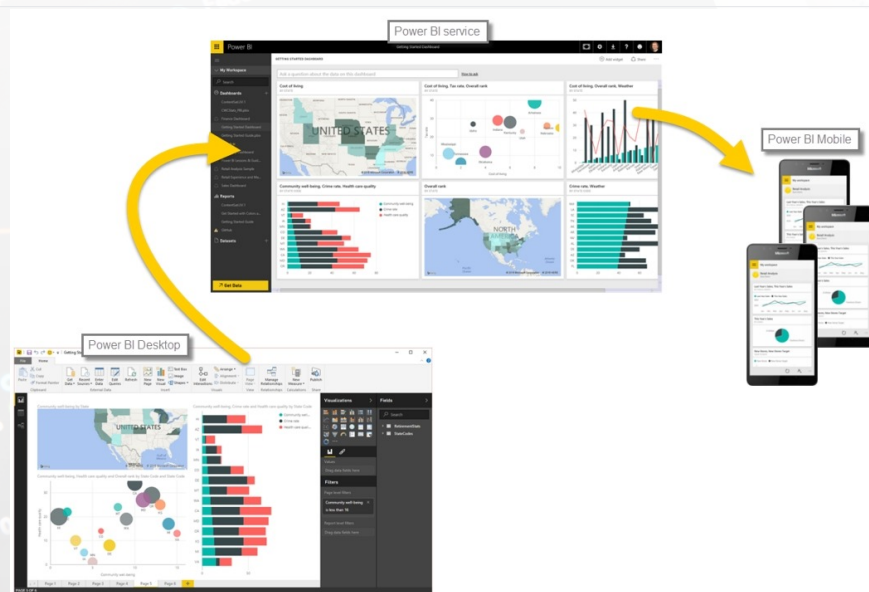
# 1. Getting Started



## Watch all of the Introduction

You may be tempted to skip past the overview into the “meatier” parts of the tutorial, but don’t! Take the time to familiarize yourself with the building blocks of Power BI.

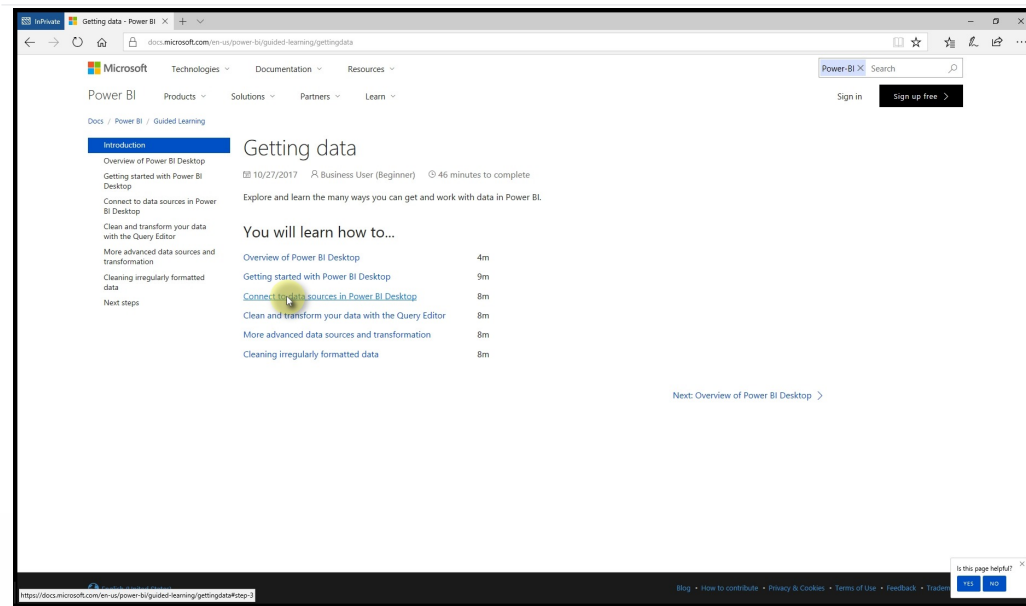
[Link to Introductory Section](#)



## Learn How the Power BI Applications Work Together

With Power BI, you can build the report in Power BI Desktop, publish the report to the Power BI Service, and make it available anywhere through Power BI Mobile.

## 2. Getting Data



### Connect to Data Sources

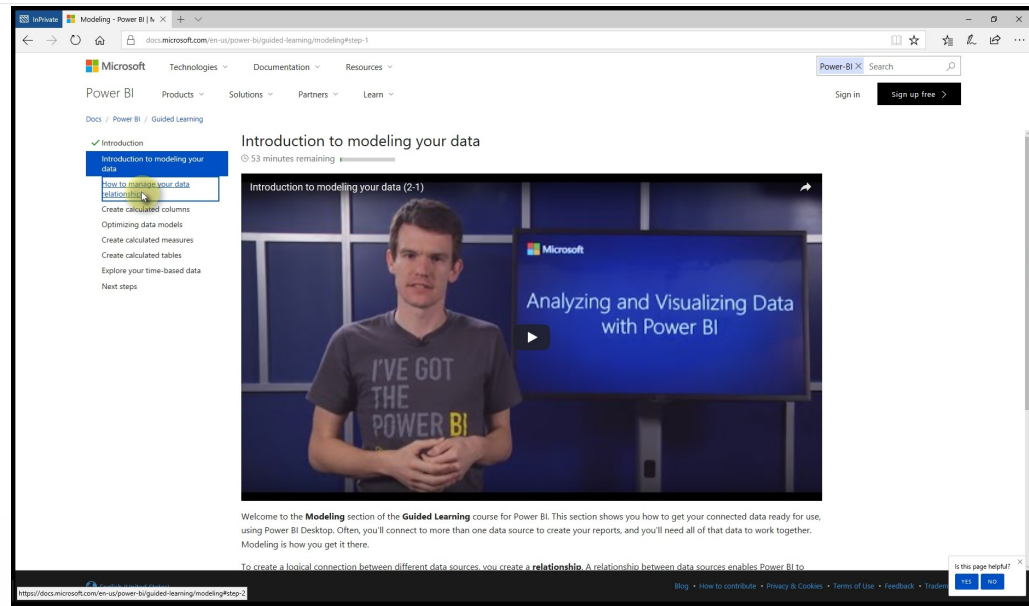
What's a business analytics tool without good, clean data? Power BI allows you to pull in data from a variety of sources.

At a minimum, watch the first 3 videos in this section. They will show you how to:

- Create a report in Power BI Desktop
- Publish the report to the Power BI Service

[Link to Getting Data Section](#)

### 3. Modeling



#### Learn about Data Modeling

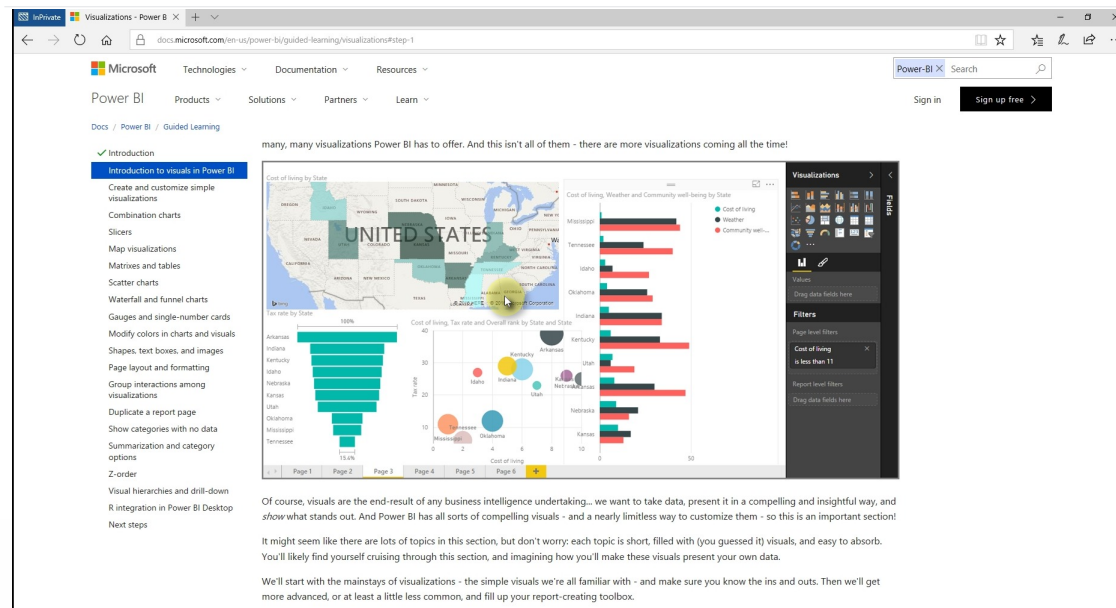
If you haven't spent a lot of time working with data models, the first three videos in this section will be **particularly useful to you.**

Modeling enables you to define the relationship between the different data sources. Setting up your data models correctly is critical to extracting the desired insights.

[Link to Data Modeling Section](#)



## 4. Visualizations

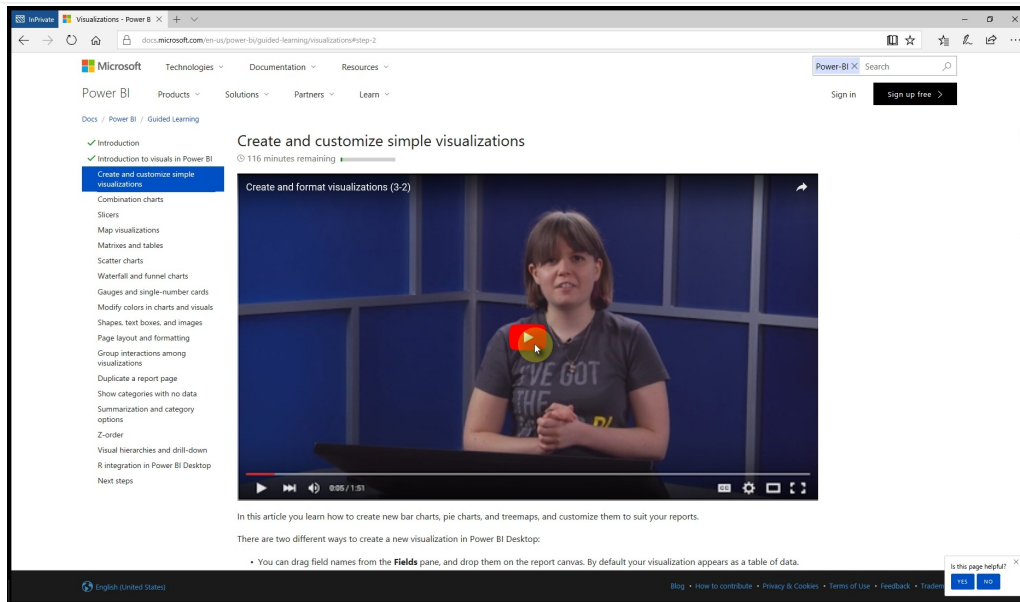


### Creating Visualizations is easy

Power BI makes data beautiful and insightful. Display your data in a variety of ways - scatter charts, pie charts, **maps, tables.**

Explore this section to understand your options, and get ideas about the best way to present your company's business intelligence.

[Link to Visualization Section](#)



## Watch this video

Less than 2 minutes long, this video shows you how to drag fields onto the report canvas.

After watching, switch over to your Power BI application and try it yourself!

[Watch Video Here](#)

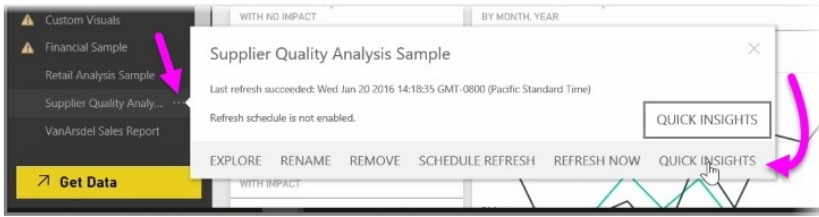
# 5. Exploring Data



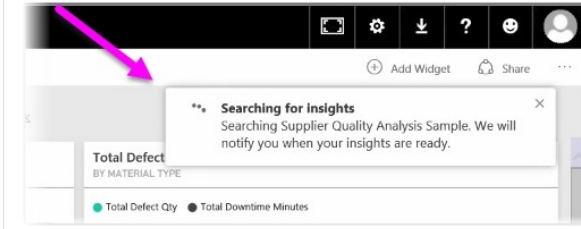
## Introduction to the Power BI Service

In this "Exploring Data" section, you'll be introduced to the Power BI Service, which extends the capabilities of the Power BI Desktop, allowing you to create reports and share data with your team.

[Link to Exploring Data Section](#)



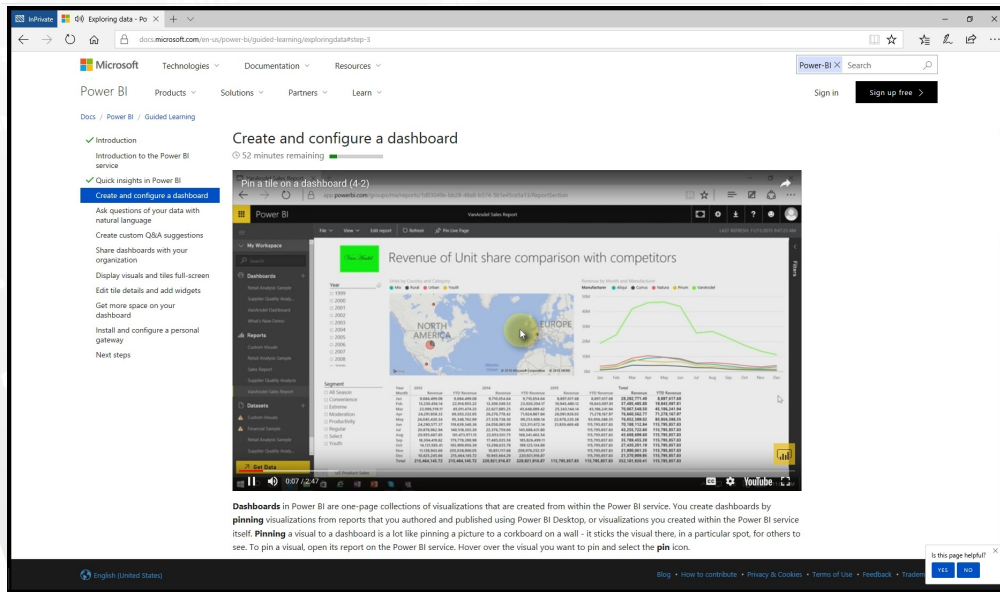
When you select Quick Insights, Power BI performs some machine learning and searches the data, analyzing it to find quick insights. You'll see a notification in the upper-right side of the service that indicated Power BI is working on finding insights.



## Finding Quick Insights

When you're working with a dashboard, report, or dataset in the Power BI Service, you can look for quick insights into the data.

In Power BI, from the Datasets section in the left pane, select the *ellipses* (the three dots) beside the dataset you're interested in. A menu of options appears, and on the far right you'll see an option called Quick Insights.

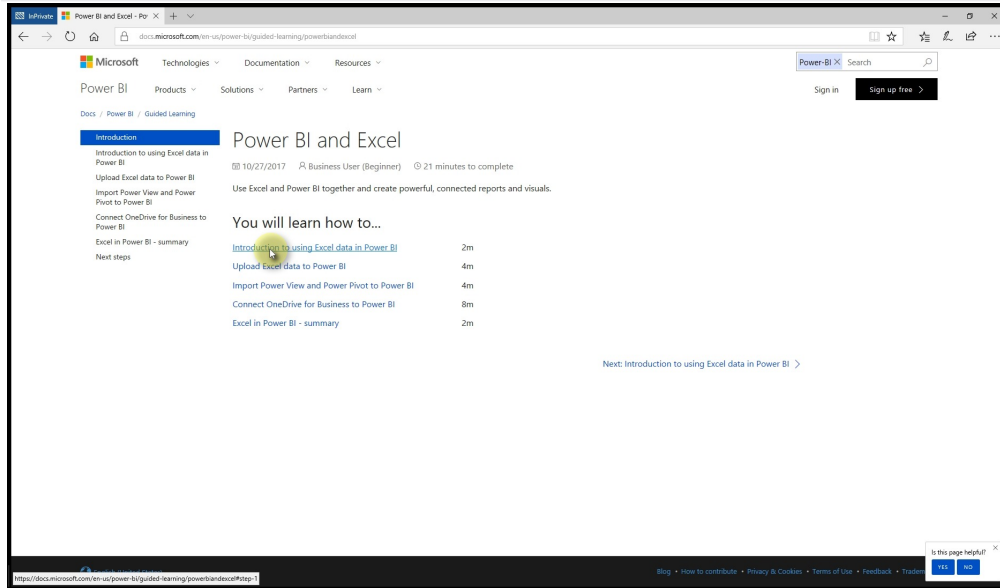


## Create Dashboards

You can "pin" a visual to any dashboard. By combining different data sets, you can create dashboards for different user roles - like sales, procurement, accounting, etc.

If a user wants more detail, they can click the visual to explore the source data.

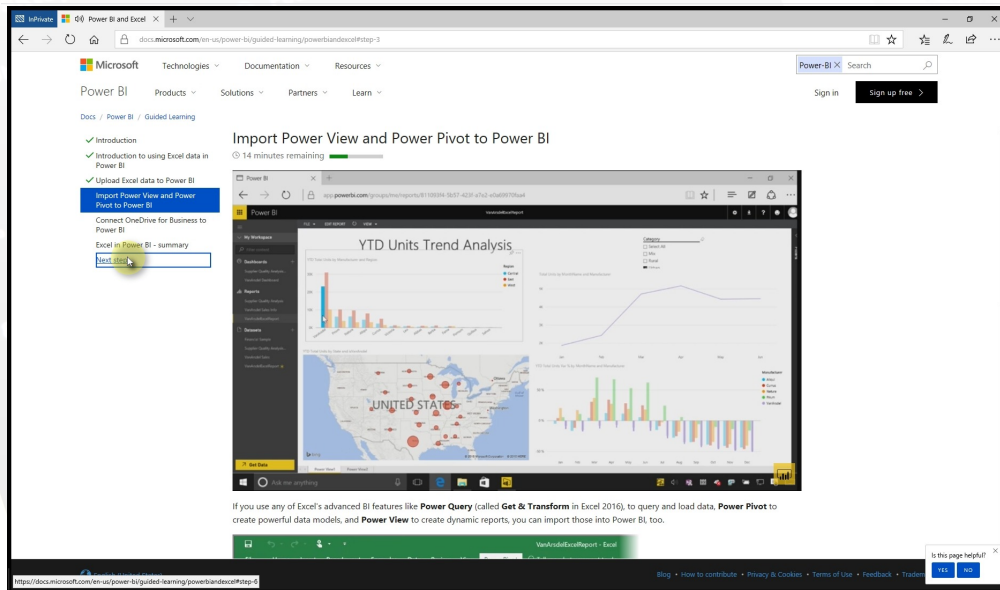
# 6. Power BI and Excel



## Using Excel and Power BI Together

If you like Excel, you'll love Power BI. Knowing how reliant most business users are on Excel, the two tools are designed to work hand-in-hand.

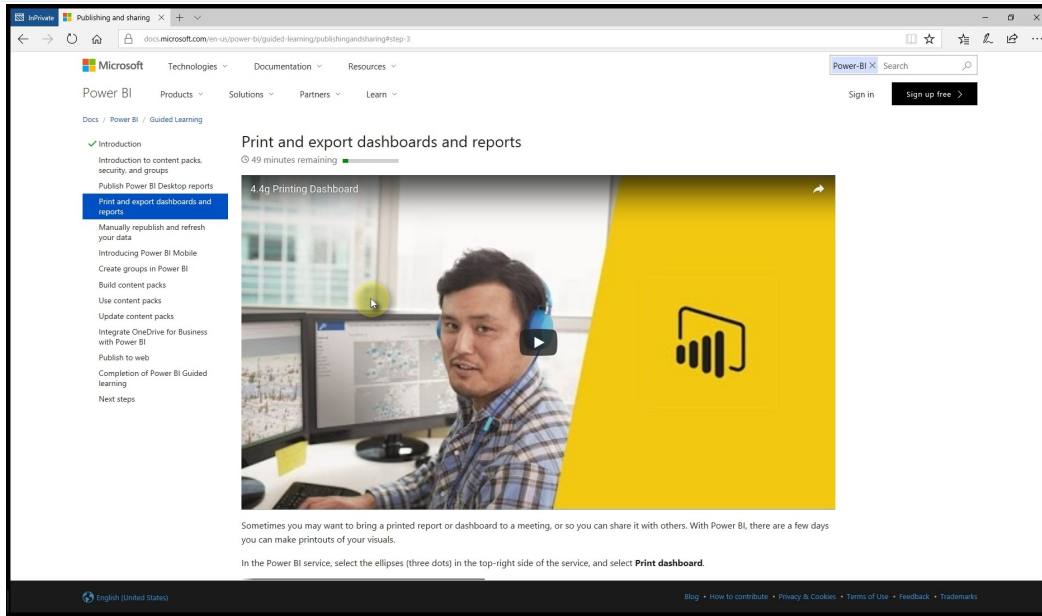
[Link to Power BI and Excel Section](#)



## Explore the "Power" Features

Advanced Excel users will especially appreciate these advanced Power BI features, which provide you with more options for data modeling and to create dynamic reports.

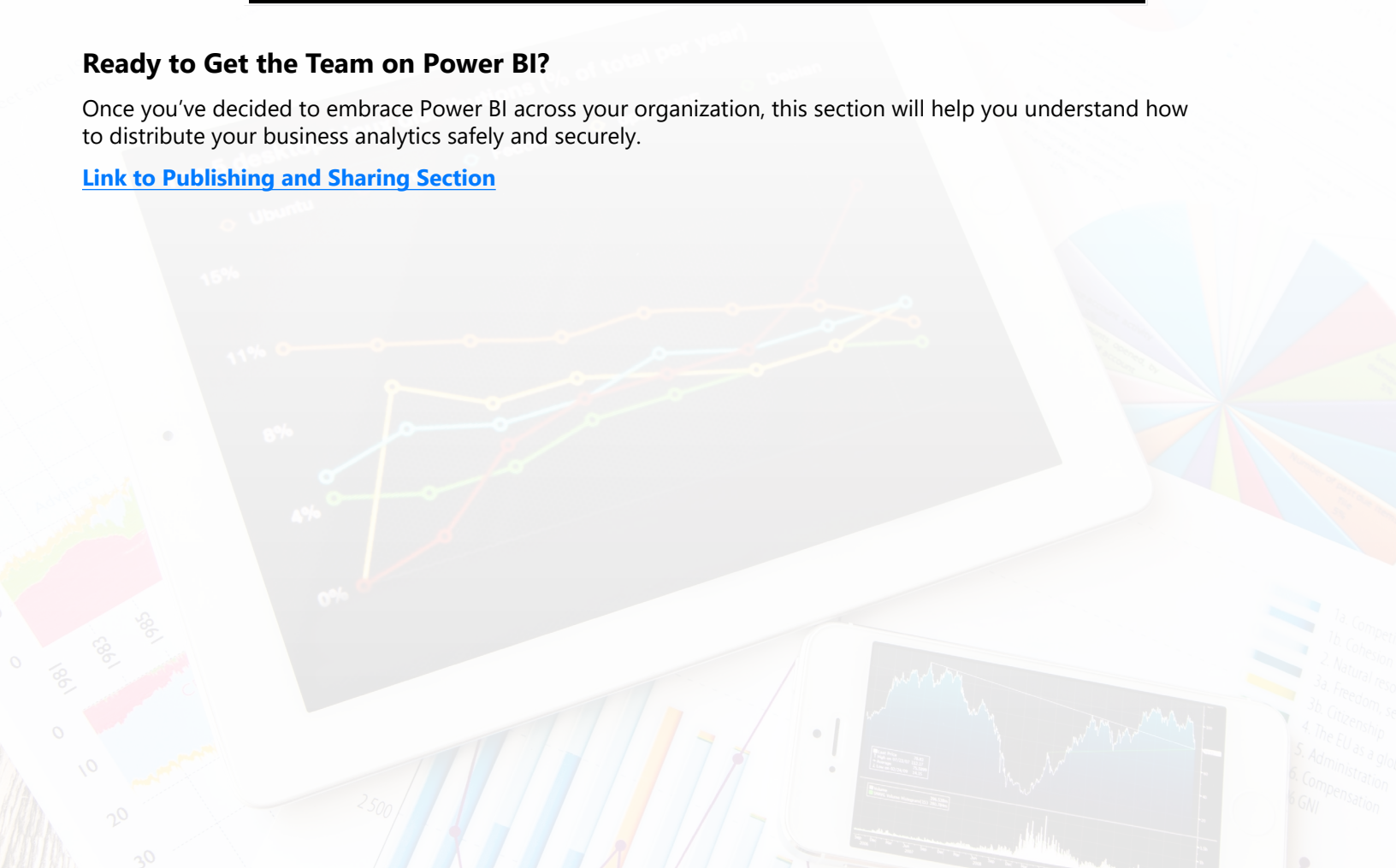
# 7. Publishing and Sharing



## Ready to Get the Team on Power BI?

Once you've decided to embrace Power BI across your organization, this section will help you understand how to distribute your business analytics safely and securely.

[Link to Publishing and Sharing Section](#)



# 8. Introduction to DAX

Docs / Power BI / Guided Learning

- ✓ Introduction
- ✓ Introduction to DAX
- DAX calculation types**
- DAX functions
- Using variables in DAX expressions
- Table relationships and DAX
- DAX tables and filtering
- Next steps

'Table Name'[ColumnName]

If there are spaces in the table name (as shown above), the single quotes around the table name are mandatory. If the table name has no spaces, the single quotes can be omitted, so the syntax looks like the following:

TableName[ColumnName] Copy

The following image shows a DAX formula being created in Power BI:

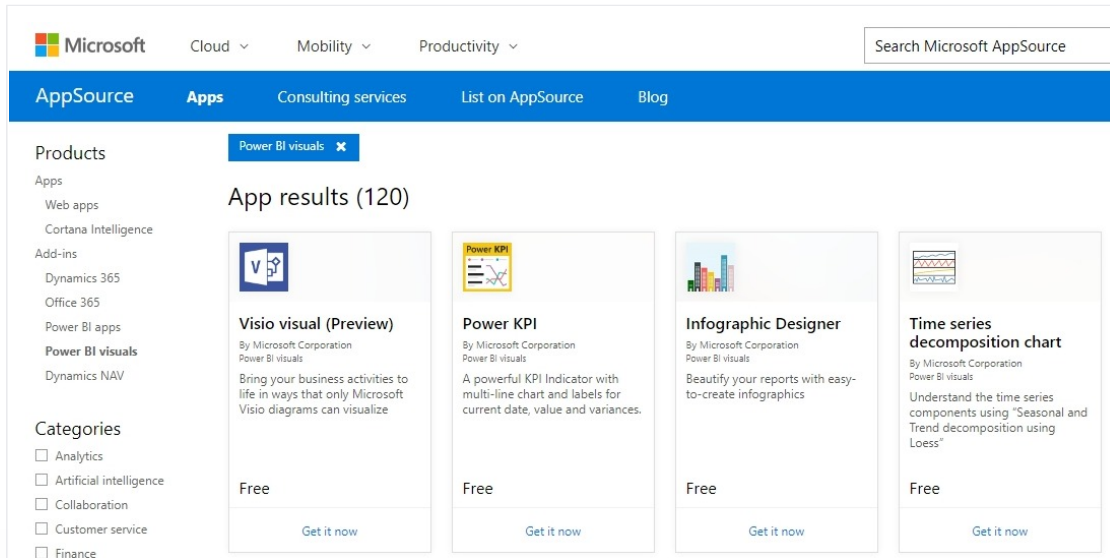
Calculations		Sort	Formatting
Sales Amount = Sales[Unit Price] * [Quantity]			
ey	ProductKey	CustomerKey	Quantity
199	1316	1316	1
199	1316	1316	1
199	1316	1316	1
199	1316	1316	1
306	2505	2505	1
306	2505	2505	1
306	2505	2505	1
306	2505	2505	1
306	2505	2505	1

## What is DAX?

DAX stands for Data Analysis Expressions and is the language used throughout Power BI (as well as other Microsoft tools.)

[Link to Introduction to DAX Section](#)

# Additional Resources



## Use Pre-Defined Apps & Visuals

Microsoft's AppSource offers a variety of Power BI apps and visuals you can bring into your Power BI Desktop. Search by industry or business area to narrow your options.



## Learn About New Features

The Microsoft Power BI Blog is a great resource for getting new ideas and staying up-to-date on the latest enhancements.

[Visit the Power BI Blog](#)



## Support options



### Guided learning

Follow our courses of videos and articles that walk you through how to accomplish common tasks.



### Samples

Review examples of dashboards, reports, and desktop files. See how our partners put Power BI to use.



### Documentation

View in-depth articles for all of Power BI's tools and features, from getting started to advanced techniques.



### Ask the Community

Visit the Power BI community to get answers and tips directly from other Power BI users.



### Submit an idea

Do you have a great idea that will make Power BI even better? We'd love to hear from you!



### Report an issue

Found a bug? Let us know with as much detail as possible, so we can fix it in future Power BI updates.

## Lots of Support Options

The Power BI Support page is an excellent resource.

The page will let you know if Power BI Services is experiencing any outages or performance issues. In addition, you can find community resources and open a help desk ticket if needed. Visit

the [Power BI Support Page](#)

For more personalized help, our team at [MCA Connect](#) can provide both consulting and support for Power BI.

# About MCA Connect

## How Can We Help You?

MCA Connect is a Global Systems Integrator and Gold Microsoft Dynamics Partner that delivers and supports operational transformation to help our clients achieve a competitive advantage. MCA Connect has an experienced Business Analytics practice that enriches the insight of Dynamics 365 and other data sources.

To learn more about our Analytics Practice, visit our website at <http://mcaconnect.com/capabilities/business-analytics/>.

## Questions?

Contact MCA Connect today: [Solutions@MCAConnect.com](mailto:Solutions@MCAConnect.com) or 1-866-622-0669

