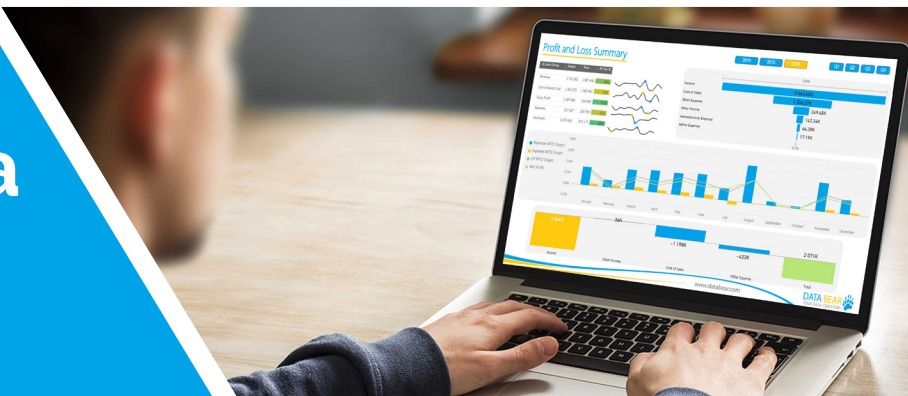


# 2 Day Power BI Training Agenda

## 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



## 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



## 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



## 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
  - Blank()
- 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 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



## 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**



## Data Refreshing

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

