



# 3 Day Power BI

TRAINING WORKSHOP

## Empower Your Organisation Through Compelling Data Story-Telling

Access the information you need when you need it through visually stunning dashboards and reports



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 **Introduction to Power BI workshop**, our structured course helps those with little to intermediate experience understand the fundamental concepts required for optimizing value from Power BI. All training exercises, have a relevant context, covering 'real-life' scenarios that require building KPIs to **answers specific business questions**. This training ensures that, going forward, your team has the best practice foundation to continue the process of **compelling data storytelling**. Learn the Power BI tricks of the trade from a team who has successfully implemented Power BI solutions globally.

## What do I need for Remote Online Training?

- Windows OS Laptop with a recent version on Power BI Desktop installed.
- Good Internet connection
- A second screen or an additional device (e.g. a tablet)
- A headset or built-in speakers and microphone

### Duration:

Three days (14 hours)  
9:30 am - 4:30 pm (CST)  
(each day)

### Prices:

Public Live Online Class  
\$1,199 USD  
per delegate

Private Live Online Class  
\$1,599 USD  
per delegate

[Click Here to Book Online](#)

### Contact Us:

+44 20 8720 6880  
training@databear.com

# Objectives

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## 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?

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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?**

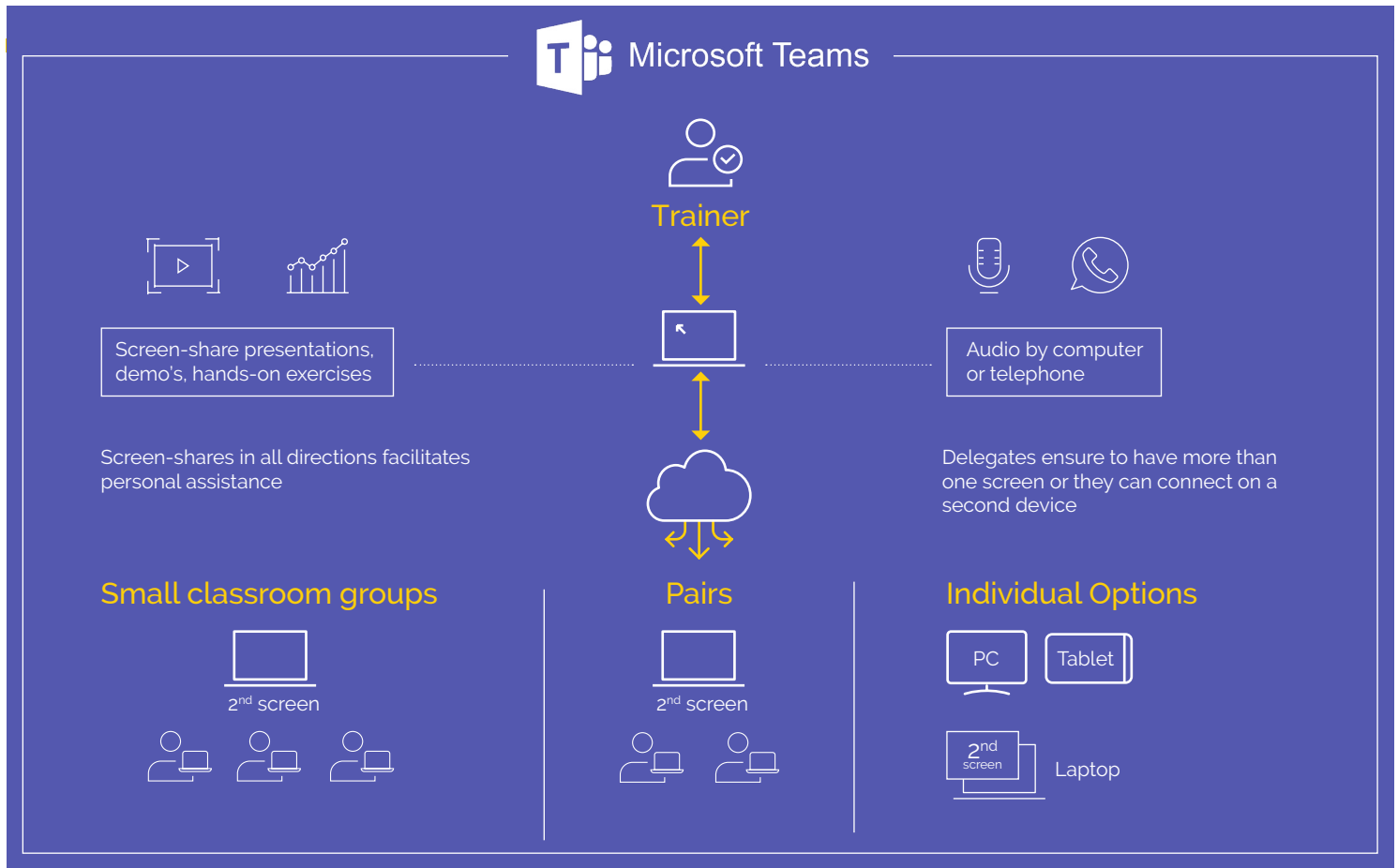
# About us

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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.



# Remote Live Online Training



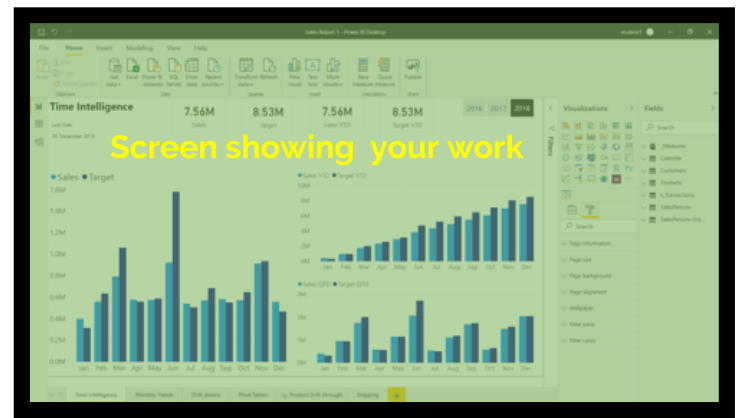
- Using **Microsoft Teams**, a video conference with screen and audio sharing will be made available for all delegates
- You can connect using Microsoft Teams, or if you don't have access to Teams, you can connect through **any internet browser**
- The trainer's screen and audio will be shared with all delegates
- If needing assistance, you can share your screen with the trainer
- At any time during the training you can unmute your microphone to ask questions, or for further clarification
- Allowing for simultaneous display of both the trainers screen and your own, it is **highly recommended** that you have either a **second screen or an additional device**, e.g. 10"+ Tablet.
- All required training files and the training manual will available for download through Teams

# Join Using Two Screens

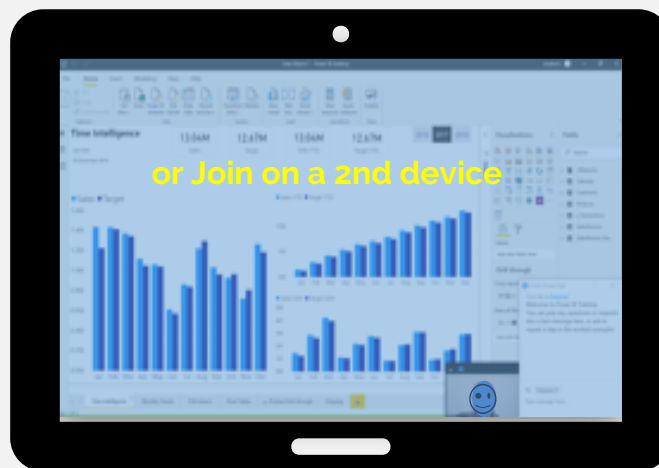
To ensure efficiency, the use of **two screens** is required. One of your two screens displays the trainer's presentation. Having two screens empowers you with a clear view of the what the Trainer is explaining and your own working examples as you follow along.



One screen shows a clear and constant view of the Trainer's screen



Use your second screen to display your work as you follow along through the exercises.



If you don't have 2 screens, to constantly display the trainers screen, you can join the Teams meeting on a second device, for example a tablet. You can then use your laptop or PC to do the worked examples as you follow along from the second device.

# Course Content

# Day 1



## Overview of Power BI

- The Value Offering
- Licensing and Pricing
- Market Positioning



## 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 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



## 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 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

# 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?

- ✓ Microsoft Gold Partner
- ✓ Training Focuses on Best Practices
- ✓ Step-by-step digital manual provided
- ✓ Additional Power BI Helper Files Provided
- ✓ Over 50 5 Star Google Reviews
- ✓ After Training Support Available



## Vertical Focus

We're a Power BI centric company, and a Microsoft Power BI Partner, with a vertical focus on empowering organisations with Power BI training and solutions that produce results. Our passion is to help organisations become more 'Data Savvy'.



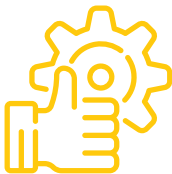
## Deep Domain Experience

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

The process of using Power BI to ensure organisational value is an ongoing learning journey. To ensure your team can overcome any obstacles or issues experienced after the training, we provide '**after training**' support packages. In this scenario, you can purchase a bundle of support hours to be drawn from as needed or we can provide support on a 'pay-as-you-go' basis. The '**pay-as-go**' offer is exclusive to organisations or individuals who have received training from us.



## Quality

**Quality Assurance** — as a Gold 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 Online** Through live remote online training, we empower organizations globally, regardless of their geographical location.

[Click Here to Book](#)



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