



Microsoft 365

An Introduction to PowerBI



DURATION

1 Day

COURSE OVERVIEW

PowerBI Desktop is part of the suite of tools from Microsoft which enable data to be analysed and published from a variety of sources.

With PowerBI Desktop, you get a report authoring tool that enables you to connect and query data from different sources using the Query Editor. From the datasets you build with Query Editor you can add visualisations and create reports. Reports can then be published.

TARGET AUDIENCE

The course introduces PowerBI Desktop and is designed for users who are looking to make a bigger impact with the way in which they want to report on data through visualisations.

It covers the use of PowerBI Desktop to connect to data, create visualisations, query the data and publish reports.

Please note that this course does not cover PowerBI Pro, PowerBI accessed via Microsoft 365 or SharePoint Services.

LEARNING OBJECTIVES

On completion of this course, you will be able to:

- Understand PowerBI Desktop concepts and main features.
- Use data sources that are compatible with PowerBI Desktop.
- Connect to data.
- Explore data visualisations.
- Apply common query tasks to shape data in PowerBI Desktop.
- Create and publish reports.

PRE-REQUISITES

This course is not suitable for users who are new to Excel or Databases as delegates must have an understanding of the basic data concepts.

Delegates must already have the knowledge and ability to create and format chart outputs and they should also have a basic understanding of Functions (ideally Aggregate Functions).

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COURSE CONTENTS

Lesson 1 – Getting Started with Power BI

- A. Concepts and overview.
- B. Introduction to main features.
 - a. Imports.
 - b. Visualisations.
 - c. Filters and queries.
 - d. Reports.

Lesson 2 – Connect to a Data Source

- A. Data sources PowerBI will connect to.
- B. Data types.
 - a. Data behaviours.
- C. Importing and entering data.
 - a. Creating tables.
- D. Get data and query using Editor.
- E. Combining data sources as a mash up.
 - a. Merge queries.
 - b. Append queries.

Lesson 3 – Working with Relationship View

- A. Understanding relationships.
- B. AutoDetect.
- C. Create using AutoDetect.
- D. Create relationships manually.
- E. Edit.
- F. Cross Filter.
- G. Join Types.

Lesson 4

- A. Visualisations.
 - a. What's available?
 - b. Create a quick visualisation.
 - c. Table and matrix visualisation.
 - d. Conditional formatting.
- B. Charts.
 - a. Types.
 - b. Create a chart visualisation.
 - c. Analytics.
 - d. Forecast.
 - e. Create a KPI visualisation.
- C. Slicers.
- D. Drill visualisation to see underlying data.
- E. Clustering.
- F. Creating role based views.
- G. GEO-data, categorisation and maps.

Lesson 5 – Querying and Shaping Data

- A. Filter.
- B. Pivot.
- C. Add calculations.

Lesson 6 – Reports and Output Options



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speak to one of our course advisors.