

Excel Level 4: Business Reporting using PowerBI

Latest versions from 2019 and Microsoft 365

What is Power BI?

Power BI is a collection of software services, apps, and connectors that work together to turn your unrelated sources of data into coherent, visually immersive, and interactive insights. Your data might be an Excel spreadsheet, or a collection of cloud-based and on-premises hybrid data warehouses. Power BI lets you easily connect to your data sources, visualize and discover what's important, and share that with anyone or everyone you want. You can create your own data set based on a single or multiple sources and transform this data into professional quality interactive dashboards.

Power BI consists of several elements that all work together, starting with these three basics:

- A Windows desktop application called Power BI Desktop.
- An online software as a service (SaaS) service called the Power BI service.
- Power BI Mobile apps for Windows, iOS, and Android devices.

How you use Power BI depends on your role in a project or on a team.

Who should attend?

- Anyone looking to pursue a career in data analysis or business intelligence
- Data analysts and excel users hoping to develop advanced data modelling dashboard design and business intelligence skills
- People who want to understand how to create customized visuals
- All excel users who work with data reports and dashboards
- Management accountants who are required to report on transactional datasets
- Marketing and operational analysts

Duration

2 days

Prerequisites

You must have attended our advanced course or one similar. Work with large amounts of data daily requiring sophisticated reporting.

COURSE CONTENT

Module 1: Introduction to power BI

- What is power BI
- Understanding the power BI architecture
- Installing power BI desktop
- Signup with the Power BI service

Module 2: Importing data using Power BI

- Loading data from files and databases
- Removing unwanted rows and columns
- Transforming data
- Cleansing and shaping data
- Using functions and parameters

- Discuss direct query and live query
- Power Query best practice

Module 3: Enriching your data model with DAX

- Understanding table relationships (Active vs inactive & single direction vs both)
- Creating calculated columns and measures
- Extending your model using date tables (Calculated table)
- Create hierarchies

- Change date and number formats
- Understanding evaluation context
- Time intelligence functions
- Modelling best practice

Module 4: Visualisations

- Chart types
- Formatting charts
- Understanding report, page and visual filters and slicers
- Designing interactive reports
- Enhanced reports with text boxes, annotation shapes and images
- Custom visuals
- Using report themes
- Visualisation best practice