



## The Power BI Day for Excel Users

### GOAL

The Power BI day is a full day course specifically designed for Excel users to get quickly up and running with Microsoft Power BI. The content is structured so that attendees not only learn the fundamentals of utilising features within the Power BI environment but also techniques to create refreshable reports that can be shared and viewed by colleagues without requiring Power BI Pro licencing.

### OUTCOME

The outcome of the day is to make it easy for participants to use Power BI to start improving their current, real world reporting. Attendees will leave the course knowing how to convert current Excel based reports into Power BI reports thus improving their ability to slice and dice data, and improve reporting processes.

### DURATION

1 day (9am – 12pm then 1pm – 4pm), delivered at your premises.

### DELIVERY

The day is instructor led to a maximum of 8 participants. Participants will be hands-on all through the day.

### PRICING

The total cost for the day for up to 8 participants is \$1,450 + GST (that's approximately \$180 per person). Additional costs may apply for travel outside of Brisbane, Queensland.

### HOW TO BOOK

Make a booking for the course by emailing [mark@theofficebox.com.au](mailto:mark@theofficebox.com.au) or phone 0408 331 464.

### SET UP REQUIREMENTS

A room with a data projector that seats up to 8 participants. Attendees will require a Windows based PC with Excel 2013 (or any later version). The free Power BI Desktop application will also be required ([download here](#)). An Office 365 tenant with Power BI Pro licencing is optional and can be set up for attendees.

### EXPECTED ATTENDEE SKILL LEVEL

Attendees should be competent Excel users who can create Excel based business reports. Skills expected include the ability to filter and sort data, apply formats, use basic functions and formulas, and create charts.



## SCHEDULE

### 1 Introduction

*The introduction provides an overview of what Power BI is, the improvements to business reporting that it provides, and how you can very quickly produce a powerful, interactive online report.*

- What is Power BI?
- Build an online dashboard in minutes
- Pros and cons of Power BI
- Power BI dashboards, Power BI Desktop, Power BI Pro, Power BI Service, Power BI reports. How the various Power BI options fit together
- Options for refreshing and sharing

### 2 The Power BI Desktop

*The Power BI Desktop provides advanced authoring capabilities enabling both data cleansing and connections to multiple data sources.*

- Interface overview and key components
- Connecting to multiple data sources
- Creating relationships between data sources
- Planning a report
- Creating report pages utilising a variety of visualisations
- Formatting options for visualisations
- Controlling interactions between visualisations
- Using the field panel to filter, sort and add tooltips

### 3 Sharing Power BI dashboards and reports

*There are a number of levels of licencing options for Power BI and therefore a number of options for sharing your visualisations. This section runs through those options.*

- Report saving and sharing options
- Sharing dashboards
- How do I share Power BI for free, without Power BI Pro licencing

### 4 Refreshing dashboards and reports

*The multiple options for sharing mean there are multiple options for refreshing data and visualisations. This section shows you the options for refreshing your reports, regardless of where the data source is stored.*

- Refreshing reports stored in the Microsoft Cloud
- Refreshing reports stored on corporate network drives

### 5 Building a report navigation structure

*Enabling a good navigation experience for consumers of your reports will enhance the benefit and value that the report offers. This section will guide you through the options for building a user interface.*

- Creating bookmarks to reset report page views
- Adding buttons and images to enable navigation



## 6 DAX expressions and functions

*The Power BI Desktop provides a powerful formula language called DAX. This section gets you started with DAX, showing you how to create the two major DAX constructs – calculated columns and measures.*

- DAX. What it is, why you'll need it and how it compares to Excel's formulas
- Creating a calculated column
- What is a measure and do you need calculated columns?
- An overview of evaluation context
- Using some simple DAX functions
- Using a date table

## 7 The Query Editor

*Not all data is well formatted and easily visualised. The Power BI Desktop's query editor provides an interface to transform and cleanse data so that the data loads into the Power BI desktop in a format that is suitable and structured in the required format.*

- Connecting to data stored on a public website
- Transforming and cleaning data using query editor tools
- Loading and editing query data
- Building relationships between web data and existing dataset

## 8 Conclusion

*You'll now be armed with a solid understanding of the Power BI eco system but as you start creating dashboards and reports you're going to need some help. This section shows you where to get resources and assistance.*

- The constant evolution of Power BI
- Finding free Power BI resources and structured learning
- Getting help from the Power BI community

