

# Power BI - Beginner

## Detailed Content

### Introduction

A history of Business Intelligence  
The development of Self Service Business Intelligence  
Introducing Power BI  
How does Power BI fit in?  
Introducing the three main tools – Power BI Service, Power BI desktop & Power BI Mobile  
When to use Power BI Desktop  
Free versus Pro  
Signing up to the Power BI online service  
Which sources of Data can I use?  
Content Samples  
Online Services  
Azure & SSAS

### Working with an Excel Workbook

Understanding your data  
Creating Tables of data to put into the Power BI service  
Where your workbook file is saved makes a difference  
Uploading your Workbook data into Power BI  
Importing your Workbook data into Power BI

### Working with the Power BI service

The User Interface  
My Workspace  
Menus  
The Fields Pane  
Field Icons  
Visualisations Pane

### Visualisations

Overview of Visualisations  
Creating and working with Visualisations

Creating a Bar Chart Visualisation  
Creating a Column Chart Visualisation  
Creating a Line Chart Visualisation  
Some basic formatting of Visualisations  
Consistency of Style  
Focus Mode  
Creating a Card Visualisation  
Giving Cards some impact  
Creating a Table Visualisation  
Creating a Matrix Visualisation

### Working with Formats in a Visualisation

Axes  
Data Labels  
Titles  
Sizing & Alignment  
Data Colours, Backgrounds and Borders

### From Visualisations to Reports

Saving a Report  
Adding Pages to your Reports  
Renaming Pages  
Re-using Visualisations  
Building a Narrative in your report  
Editing & Reading Modes  
Pie Chart Visualisations  
Text Boxes  
Shapes

### Using Visual Interactions

Introducing Visual Interaction  
Turning Interaction On or Off  
Interacting by Filtering, Highlighting or None

### Working with Filters

Creating a Slicer  
Filtering in the Visualisation pane

Creating a Visual Field filter  
Creating a Top N Filter  
Adding a page level Filter  
Creating pages from page level filters  
Add a report level Filter

### Working with Reports

Printing your Reports  
Exporting to PowerPoint  
Using a Power BI created PowerPoint file  
Publishing to the Web – embed codes  
Interacting with a Power BI created web page  
Generating a QR code  
Pasting and scanning a QR code  
Possible uses for a QR code versus a web-link

### Working with Dashboards

Adding Visualisations to your dashboard  
Adding Visualisations from multiple reports  
Pinning a Live Page  
Web Content tiles  
Text box Tiles  
Video tiles  
Generating Alerts from Cards and KPIs  
Renaming Dashboards  
Favourite Dashboards  
Featured Dashboard  
Printing Dashboards  
Generating Alerts from Cards and KPIs

### Q & A and Quick Insights

Making Visualisations with natural language queries  
Create a Visual using Q&A  
Modify a Q&A  
Activating Quick Insights  
Using Related Insights  
Analyse data in a visual

# Power BI - Beginner

## Power BI Publisher for Excel

- Installing Power BI Publisher for Excel
- The Power BI Publisher for Excel ribbon
- Connecting to your Power BI Profile
- Pinning Ranges
- Updating Pinned Ranges
- Creating new Power BI Dashboards from inside Excel
- Make a connection from your data in Power BI back to Excel

## Sharing Dashboards & Reports

- Sharing a Dashboard or Report
- Sharing Permissions
- Permissions
- Sharing Links
- Stop Sharing
- QR codes

## Power BI Mobile

- Installing the Power BI mobile apps
- Settings
- Signing into your profile
- Accessing samples
- Interacting with Dashboards
- Favourite Dashboards
- Interacting with Reports
- Pages in Reports
- Annotating Reports
- Sharing a Dashboard
- QR Scanner

## Refreshing your Data

- Refreshing your Datasets
- Upload file to OneDrive
- Load data from OneDrive file
- Scheduled refresh on OneDrive
- Updating data after changes

## Data Normalisation

- Overview of Data Normalisation
- Normalising a dataset
- Normalising data to build a Data Model
- Using Query Editor in Microsoft Excel
- Fact and Dimension Tables

## Power BI Desktop

- Introducing Power BI Desktop
- Connecting to a database
- Building a Data Model
- Using Query Editor
- Formatting and Properties of Data types and their uses
- Loading Individual Tables
- Relationships
- Creating Relationships
- Deleting Relationships

## More Complex Visualisations

- Creating a Bubble Map Visualisation
- Creating a Filled Map Visualisation
- Creating A Gauge Visualisation
- Creating a Treemap Visualisation
- Choosing the right Visualisations

## Using Custom Visuals

- Custom Visualisations Gallery
- Installing a Custom Visualisation
- Word Cloud
- Chiclet Slicer
- Enlighten Aquarium

## Access Databases and Power BI

- Access Database & Power BI
- Importing an Access Database
- Data Relationships
- Stacked Column Chart
- Sorting an Existing Visualisation
- Adding Depth to your Report
- Focusing on Key Points of Interest
- Calculated Columns
- Adding a Calculated Column
- Using a Calculated Column in a Calculation
- Displaying Calculated Columns in a Visualisation

## Content Samples

- Viewing some content samples
- Working through the Retail Analysis Sample Pack

## Getting Help

- The official Microsoft Sources
- Other sources of help

## Extended Exercise - More Visuals

- World Flag Slicer
- Count Down Timer
- Cards with States
- Scroller

## Data Normalisation Appendix

- The Normal Forms
- 1<sup>st</sup> Normal Form
- 2<sup>nd</sup> Normal Form
- 3<sup>rd</sup> Normal Form
- Primary Keys
- Relationships