

Reporting and Analytics with Power BI

CPD 24 units | 24 PL credits

Online Prework + 3 Days Classroom **or** 6 Virtual Sessions **or** Online Self-Paced



dbrownconsulting focuses on helping organizations and individuals achieve more with their data. We partner with CFA Society Nigeria to deliver world-class learning and professional development solutions to its members and candidates in Nigeria. We are also an accredited training provider of the Financial Modeling Institute based in Canada, Microsoft partners, a member of CPD UK.

Overview

Power BI is a suite of business analytics tools that deliver insights throughout your organization. Connect to hundreds of data sources, simplify data prep, and drive ad hoc analysis.

This course will introduce all the Power BI technologies including: Power Query, DAX, Data Modelling (Power Pivot), M. We will go through a methodology for automating all your reporting needs and how to create beautiful reports and dashboards giving you a 360 degree view of your business.

Participants will use Microsoft's free Power BI Desktop Application which hosts all Power BI Technologies to build a detailed reporting model from scratch. They then publish this report to the powerbi.com service to share insights with everyone.

The course is designed by a Microsoft MVP and includes free online access to chat with him and colleagues as you implement the skills back on the job.

This course is also available on our online platform at: www.OfficeTrainingHub.com.

Learning Outcomes

By the end of the course participants will be able to:

- Recall the Power BI Technologies and ecosystem
- Demonstrate working knowledge of Power Query
- Use a framework for building a Data Model
- Assess various data visualisation options in Power BI Desktop
- Make sense of the DAX formula Language
- Produce typical business reports using DAX formulas you will build on a Power BI Data Model
- Incorporate budget data to your reporting Building budget variable analysis reports
- Produce a complete reporting solution from scratch in a full Day Case Study Session

Online Pre-Work

- Participants will be given access to this course's online pre-work platform on www.OfficeTrainingHub.com
- All activities must be completed before attending the classroom sessions for the course.
- This platform also serves to introduce participants to their instructors via the discussion forum.

- The platform includes basic knowledge and definitions as well as short videos to get participants effectively prepared for the course.
- Participants are also expected to document their expectations.
- The Courses digital certificate of completion will also be issued via this platform.

Overview of Power BI Desktop

- Intro to the Power BI Desktop interface
- Review of Power BI Desktop visuals
- Choosing the right visual
- Building your first report

Framework for Building a Data Model

- What is a Data Model
- Big picture view of your reporting needs
- Why you need FACT files and DIMENSION files
- Reviewing a step by step methodology • How to create relationships
- Secrets for optimizing your reporting model
- The importance of implementing a plan on paper first Draft your first Power BI Data Model Build Plan

Building a Data Model in Power BI Desktop

- Implementing your Data Model Build plan
- Loading data into Power BI Desktop
- How to create relationships
- Review of Facts, dimensions and relationships
- Use of implicit DAX measures
- Build reports in Power BI (Simple Visualizations using Implicit Measures)

Review of the DAX Formula Language

- Why is DAX so great for Analysts
- How DAX Works, the Vertipaq Engine
- The 3 Core DAX Measures
- DAX functions vs Excel Functions
- Introduction to CALCULATE - Why it is the most important DAX Function
- Overview of the Filter Context

Time Intelligence Calculation in DAX

- Examples The concept of a calendar
- Year to Date (YTD)
- Same Period Last Year (SPLY)
- Same Period Last Month (SPLM)

Variance Calculations in DAX

- Year on Year Variance in ₦ (YoY)
- Year on Year Variance %age (YoY)
- Month on Month Variance ₦ (MoM)
- Month on Month Variance %age (MoM)
- Other variance calculations

Utilising Quick Measures

- Using Quick Measures • Interpreting Quick Measures • Modifying Quick Measures

Comparisons to Budget

- Incorporate budget data in the Data Model Compare budget to Actuals

Power BI Standard & Custom Visualisations

- Building Standard Visualisations
- Formatting Visuals
- Techniques for deciding on a Visual
- Introduction to Custom Visualisations
- Comparative Analysis

Introduction to Power Query

- Review of the Power Query interface
- Clean-up Exercise using Power Query
- Appending Data from a Folder
- Using "M" code to correct errors in Data

Practice - Case Study Application

- Reviewing your Case Studies
- Drawing up your Data Model paper Plans
- Transforming your Data with Power Query
- Building your Data Model
- Incorporating simple DAX Formulas to your Data
- Incorporating Quick Measures to your Reports
- Connecting budget information into your model
- Carrying our Variance Reporting and Analytics
- Building a Dashboard

Overview of Advanced Features in Power BI

- Inserting Bookmarks
- Inserting Buttons
- Using Q&A
- Telling a Story with the Scatterplot visual Using Quick measure

Publishing to PowerBI.com

- Publishing to PowerBI.com
- Personal vs On-Prem Gateway for data refresh
- Creating a Dashboard from your reports
- Creating Groups, Content Packs and other collaboration tools

How to Register

Virtual: bit.ly/dbrownPowerBIvirtual

Classroom: bit.ly/dbrownPowerBIclass

Self-Paced: bit.ly/dbrownPowerBIonline

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