

# Power BI Level 1



**Computer Smart Training Centre**

**SOFTWARE TRAINING SPECIALISTS**

## Getting to know Power BI

- Introducing Power BI
- How does Power BI fit in?
- 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
- 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 & 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 Managing

## Working with Reports

- Printing your Reports
- Exporting to PowerPoint
- Using a Power BI 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

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# Power BI Level 1

## 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 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 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
- Printing your Reports
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## 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

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