

Software Solutions

Microsoft Power BI

Reports and Visualisations – Level Two



This course is a must for all those wanting to learn how to create visualisations and reports in Power BI. This course will introduce you to the Microsoft's Power BI report visualisations. In this first hands-on workshop, you will learn the essential methods of creating and formatting visuals. This course is full of hands-on exercises that will walk the learner through how to create, manage and format action buttons, cards, multi-row cards, slicers, tables, maps, decomposition trees, matrices, charts (including scatter, pie, donut, waterfall, ribbon and bar charts), smart narratives and Q&A buttons and more. Reports are then set up for easy navigation, interaction via a mobile device and ultimately published to a Power BI service for easy access by others. It is fundamental that a Power BI user be able to report data with visualisations and publish the data for readers to view.

The Power BI Get and Transform Data course Level 1 is a prerequisite to this course.

Data analysts, managers, data scientists and anyone who is interested in presenting data insights quickly and easily will benefit from this course. This course is essential for those who have never used Power BI, as well as beginners and those that are self-taught and want to learn Power BI properly.

COURSE CONTENT

SETUP POWER BI FILE

DATA MODEL VIEW (BEST PRACTICE)

CREATE A DATE TABLE (BEST PRACTICE)

- CREATING A DATE TABLE USING M CODE FUNCTION
- MARK A DATE TABLE
- RELATE A DATE TABLE
- DATA TYPES AND FORMATTING
- HIDING UNNECESSARY COLUMNS (BEST PRACTICE)

WORKING WITH THE POWER BI REPORT CANVAS

- THE REPORT CANVAS
- THE FIELDS PANE
- THE VISUALISATIONS PANE
- BUILD VISUALS
- ANALYSE VISUALS
- MANAGE VISUALIZATION FIELDS
- FORMAT VISUALS
- ADD ANALYTICS TO VISUALS
- THE FILTERS PANE

REPORT PAGES

- MANAGE PAGES
- ADD AND FORMAT TEXT BOXES
- THEMES
- PAGE VIEW
- FORMAT PAGE

TABLES & MATRICES

- RENAME VISUALS
- SORTING TABLES
- CONDITIONAL FORMATTING
- FOCUS MODE
- FILTER TABLES & MATRICES
- COPY VISUALS
- FUNCTIONS
- SHOW VALUES AS PERCENTAGES

CHART VISUALS

- PIE CHART
- DONUT CHART
- CLUSTERED BAR CHART
- FUNNEL CHART & WHEN TO USE A FUNNEL CHART
- RIBBON CHART & TOP N
- WATERFALL CHART AND WHEN TO USE A WATERFALL CHART
- SCATTER CHART WITH PLAY AXIS & TOP N FILTER

DECOMPOSITION TREE

KEY INFLUENCERS

- INTERPRET CATEGORICAL KEY INFLUENCERS
- TOP SINGLE FACTOR THAT INFLUENCES THE LIKELIHOOD OF AN INCREASE
- INTERPRET THE RESULTS: TOP SEGMENTS

CREATING AND FORMATTING MULTI-ROW CARD, GAUGES, MAPS AND CARDS

GENERATING AND CUSTOMISING SMART NARRATIVE

ANALYSIS INCLUDING TRENDLINES, MIN, MAX AND AVERAGE LINES & FORECAST

SLICERS & FILTERS

- DROPDOWN SLICER
- LIST SLICER
- RANGE SLICER
- SYNC SLICERS

Q & A BUTTON

- ACTION BUTTONS
- PAGE NAVIGATOR

BUTTONS

INSERT IMAGES

POWER BI SERVICE

- PUBLISH

MOBILE LAYOUT

- MOBILE AUTHORIZING FEATURES
- PUBLISH A MOBILE-OPTIMISED REPORT
- MOBILE LAYOUT VIEW