

Power BI Desktop – Level 2 – 1 day course

About the course

CMBI's "Power BI Desktop – Level 2" course is aimed at analysts and developers wanting to continue building on the Power BI knowledge obtained in the Level 1 course. We continue to build on the basics, teaching you the skills required to enhance and extend your end-to-end reporting solutions in Power BI.

This **1-day intermediate course** delves deeper into the functionality and capabilities of Power BI. At the end of the session, you will be a master of importing data with Power Query, writing powerful measures with DAX and creating highly effective and interactive reports, to drive better insight and decision-making in your organisation.

Who should do this course?

This course is designed for analysts, developers or managers wanting to build on their existing knowledge of Power BI. We recommend that attendees complete CMBI's "Power BI Desktop – Level 1" training session prior to attending this course.

Delivery Method

CMBI presents each training workshop as a series of practical exercises, giving attendees hands-on experience with personalised one-on-one support in each session.

Training can either be hosted onsite at your premises or remotely, using industry-leading video conferencing software.

Materials and support

CMBI's course materials support learning and re-enforcement well beyond the workshop.

Each session includes an associated set of support materials to help attendees complete the tasks on the day, as well as provide support after course completion:

- Supporting course notes PDF document (approximately 60 pages, printed on request)
- Complete Power BI models for all exercises
- Datasets for all examples
- Optional Q&A time at the end of the session for anyone interested in asking specific questions

How it works

Location: we come to you or host remotely

Duration:
1 day, 9am - 5pm (onsite) or
2 x 4 hour sessions (remote)

Price: \$1,999 + GST per team

Materials & support:

Each session includes:

- ✓ Supporting course notes PDF (approx. 60 pages)
- ✓ Power BI models and datasets for all exercises
- ✓ Interactive exercises with personalised support

Course content

Unit 1: Extracting Data with Power Query

- ✓ Load a csv file with Get Data
- ✓ Load multiple tables from an Excel file with Get Data
- ✓ Load data from folder
- ✓ Combine file contents of a folder into a single table

Unit 3: Integrating Data with Power Query

- ✓ Append data from two tables into a single table
- ✓ Merge multiple datasets together
- ✓ Experiment using fuzzy logic to merge datasets
- ✓

Unit 4: Loading Data to Power BI Desktop

- ✓ Refreshing data
- ✓ Disable/enable query load
- ✓ Hiding tables/columns from Report View

Unit 6: Creating Measures with CALCULATE()

- ✓ Refresher on calculated columns, measures and DAX
- ✓ Use CALCULATE() to create filtered measures
- ✓ Add measures with different filter contexts to a single visualisation
- ✓ Use ALL() with CALCULATE() to ignore report filters
- ✓ Use Quick Measures to calculate filtered measures

Unit 8: Creating Visualisations

- ✓ Create and format a Waterfall chart
- ✓ Create and format a KPI visualisation
- ✓ Create and format a Tree Map
- ✓ Create and format a Line and Clustered Column chart
- ✓ Create and format a geographic Map
- ✓ Create and format a Ribbon Chart
- ✓ Create and format a Scatterchart
- ✓ Add an animated play axis to a Scatterchart
- ✓ Add conditional formatting to Card & Chart visualisations
- ✓ Explore advanced analytics on Clustered Column charts

Unit 2: Transforming Data with Power Query

- ✓ Unpivot data
- ✓ Replace values
- ✓ Add date columns (month name, month number, year, days in month, end of month, quarter...)
- ✓ Add prefix/suffix to column values
- ✓ Change data types
- ✓ Use first row as headers
- ✓ Add custom columns
- ✓ Remove columns vs. Remove other columns

Unit 5: Relationships

- ✓ Data tables vs. lookup tables
- ✓ Create a relationship
- ✓ Inspect a relationship
- ✓ Understand the cardinality of a relationship
- ✓ Active vs. Inactive relationships
- ✓ Understand the cross filter direction
- ✓ Create visualisations to see impact of cross-filter direction
- ✓ Identify & troubleshoot problematic relationships

Unit 7: Time Intelligence

- ✓ What is Time Intelligence?
- ✓ Load a Date table
- ✓ Mark a table as a Date table
- ✓ Create relationships with the Date table
- ✓ TOTALYTD() for calendar and financial years
- ✓ SAMEPERIODLASTYEAR(), DATEADD()
- ✓ DATESINPERIOD()
- ✓ Calculating Growth and Variance
- ✓ Set alternative Sort By column
- ✓ Add conditional formatting to reports (data bars, icons)
- ✓ Use Quick Measures to create time intelligence measures

Unit 9: Enhancing User Interaction

- ✓ Create Custom Tooltips to display a report page
- ✓ Add a Visual Header Tooltip
- ✓ View the Bookmark pane
- ✓ Create bookmarks
- ✓ Create buttons
- ✓ Sync slicers
- ✓ Create dynamic titles to display user selection



Unit 10: Efficient Report Design in Power BI Desktop

- ✓ Display grid lines
- ✓ Snap objects to grid
- ✓ Align objects on the page
- ✓ Lock object on the page
- ✓ Use the Selection Pane to hide objects on the page
- ✓ Phone Layout vs Desktop Layout

Unit 11: Understanding the Power BI Service

- ✓ Publishing a report to the Power BI Service
- ✓ Navigating the Power BI Service
- ✓ Understanding Workspaces, Dashboards, Reports and Datasets
- ✓ Editing a report in the Power BI Service
- ✓ Creating a new report from a Dataset
- ✓ Uploading an Excel Workbook to the Power BI Service
- ✓ Importing data vs Uploading data
- ✓ Sharing content
- ✓ Refreshing data in the Power BI Service