

POWER BI BASICS

LEARN THE SKILLS YOU NEED TO BUILD AND SHARE A SIMPLE REPORT USING MICROSOFT POWER BI®.

C2ER and the LMI Institute are excited to invite you to participate in our Power BI Basics training. Following her April 2022 Webinar *Microsoft Power BI®: Creating an Interactive Text and Data Visualization Tool for a 21st Century Workforce*, instructor Cynthia Sundahl, MPA, MA will be offering a 4 session virtual training that takes attendees through the steps to create a report and share it on the web.

COURSE DESCRIPTION:

This course will provide participants with the skills necessary to take data from excel files and turn it into a finished, multi-page report ready to use internally or publish on the web. You will follow along as the instructor guides you through the process of creating a sample report. By the end of the course, you will know how to: import and format data, set up a data model, add visuals and filters, set up your page layout for PC and mobile view, and load your completed report to the Power Bi service and embed it into your organization's website.

The course will focus on data and visualizations frequently used by workforce development and community service organizations. Regional and time series data from the Bureau of Labor Statistics and Census Bureau will form the core of the data model. Visualizations (including maps, charts and tables) will present summary level data that can be drilled down on for specific insights.

COURSE SCHEDULE:

The course will be delivered via **four** virtual sessions. All sessions will run from **4:00 to 6:00 p.m. EDT** (1-3 PDT).

WEEK 1	Session 1: Tuesday, September 27 th	Session 2: Thursday, September 29 th
WEEK 2	Session 3: Tuesday, October 4 th	Session 4: Thursday, October 6 th

SOFTWARE AND COMPUTER REQUIREMENTS:

SOFTWARE

All attendees will need to install **POWER BI DESKTOP** (free) on a computer running **MICROSOFT WINDOWS 8** or newer.

Please ensure you have installed the August 2022 release (a link to download and install the correct version will be provided to users the week of September 6th).

Note: The final step of publishing and embedding a report will be demonstrated using the Power BI Service and a demo website, but attendees are not required to have a licensed account at the time of the course.

COMPUTER

Attendees will need to have a stable internet connection and two monitors (one for the course live-stream and one for Power BI Desktop). Attendees will not be required to use web cameras.

Note: If an attendee needs to use assistive technology or keyboard navigation, please notify us as early as possible so that we can provide you the information you will need to navigate the software in advance of the course.

TOPICS COVERED

Over the course of the four sections, the following topics are covered.

TOPIC 1: WHAT IS POWER BI?

- What is Power BI for? How can you use it as a tool to communicate and visualize data?
- Understand the relationship between the desktop software and licenses for the different online services. Which do you need to develop reports, publish them internally and online?
- Understand the features and functions available to tell your story.
- Take a tour of the online resources available to Power BI users.

TOPIC 2: SET UP, MAINTENANCE & BRANDING

- Discover key settings to enable important features.
- Learn how to refresh or update the data behind your report.
- Build and save a template with your organization's branding, color scheme and fonts.

TOPIC 3: LOAD AND PREPARE YOUR DATA

- Import source data (this course focuses on using excel files).
- Basic steps to clean, transform and set formats for your data (includes assigning geographic roles for maps).
- Connect separate data tables into a relational model to streamline your source files.

TOPIC 4: ADD AND SET UP VISUALS AND SLICERS

- Create chart, table, card and map visuals.
- Add slicers that allow your users to focus the data on an area of interest.
- Choose formatting options that enhance your visuals (including conditional formats based on your data).
- Connect your visuals across multiple pages (tabs) to expand what you can present.

TOPIC 5: A FEW BELLS AND WHISTLES

- Add a pop-up customized tooltip to present additional data.
- Add URL links to your logo or other images.
- Dip your toes into DAX, the Power BI language to add calculated columns and measures.

TOPIC 6: PUT YOUR WORK OUT THERE

- Create a mobile ready view so users don't have to zoom or squint.
- Take your report on the road by generating graphs for your reports, presentations, and PDFs.
- Load the product to the service and publish online.

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