Power BI Essentials - TTDPB01

Gain the skills to work confidently in Power BI, creating reports that are accurate, interactive, and visually compelling.

Duration: 2 Days
Skill Level: Introductory
Available Format: Instructor-Led Online; Instructor-Led, Onsite In Person ; Blended; On Public Schedule

New to Power BI? Learn how to turn raw data into meaningful insights with Power BI in this hands-on, expert-led course. You will work step by step through the entire process, from connecting and transforming data to building interactive reports and publishing them for your team. Gain practical experience with Power Query, data modeling, DAX calculations, and visualization tools to create reports that are both visually compelling and performance-driven. By the end of the course, you will have the confidence to clean and structure data, design reports that tell a clear story, and share them effectively using Power BI's powerful cloud-based tools. Whether you are just getting started or looking to sharpen your skills, this course will give you the foundation to work smarter with data.

What You'll Learn

Overview

Power BI is a powerful tool for turning raw data into meaningful insights, making it an essential skill for professionals who work with reporting, analytics, and business intelligence. Whether you need to organize messy data, create interactive reports, or share insights with your team, knowing how to use Power BI effectively will help you work faster and make better decisions. In this hands-on, expert-led course, you will learn how to connect, clean, transform, and visualize data using Power BI's core features. You will build practical skills that allow you to structure data for analysis, create dynamic reports, and confidently work within the Power BI ecosystem.

Power BI Essentials is a two-day, hands-on course designed for those new to Power BI and walks you through basic workflows, from shaping and preparing data in Power Query Editor to building relationships in a data model and writing basic DAX calculations. You will learn how to apply best practices for formatting reports, use slicers and filters to improve interactivity, and create drill-through pages for deeper insights. You will also explore how to enhance reports with hierarchies, tooltips, and calculated columns, making your visuals clearer and more dynamic. As you progress, you will work with Power BI Service to publish and share reports, set up refresh schedules, and manage workspaces effectively.

By the end of this course, you will have the confidence to clean and structure data efficiently, create compelling reports that bring your data to life, and share them seamlessly across your organization. With a balance of instruction and hands-on practice, you will leave with practical skills that can be applied immediately in your work. Whether you are an analyst, business professional, or report developer, this course gives you the foundation to build smarter reports and work more effectively with data.

Objectives

This expert-led, hands-on course is designed to help you build a strong foundation in Power BI, allowing you to confidently clean, model, visualize, and share data. By the end of the course, you will be able to:

- Connect, transform, and prepare data using **Power Query Editor**, ensuring accuracy and consistency before analysis.
- Build **relationships between data tables**, understanding when to use one-to-one, one-to-many, and many-to-many relationships.
- Write **basic DAX calculations** to create custom measures, calculated columns, and tables for more meaningful insights.
- Design **interactive reports** with slicers, filters, hierarchies, and tooltips to improve user experience and engagement.
- Publish reports to the **Power BI Service**, manage workspaces, and set up refresh schedules for seamless data updates.
- Apply best practices for **report performance and formatting**, ensuring reports are both efficient and visually compelling.

If your team requires different topics, additional skills or a custom approach, our team will collaborate with you to adjust the course to focus on your specific learning objectives and goals.

Audience

This course is ideal for professionals who **want to start using Power BI to analyze and visualize data efficiently**. It is designed for **business analysts, data professionals, report developers, and anyone who needs to turn data into actionable insights**.

Recommended Skills Before Attending:

- Familiarity with **Excel or other spreadsheet-based tools** for data organization and analysis.
- Basic understanding of **data concepts**, such as tables, relationships, and aggregations.
- Experience working with **business reports, dashboards, or data visualization tools** is helpful but not required.

Suggested Learning Paths:

Business User/Report Developer
1. **TTDPB01: Power BI: Essentials (2 days)**. Foundation for all learners.
2. **TTDPB04: Power BI: Creating Reports (1 day)**. Learn to design and build insightful reports.
3. *(Optional)* **TTDPB03: Power BI: Data Transformation & Modeling (2 days)**. If you need to clean and prepare data before reporting.

For Data Analysts & Power Users *(Focus: Data Preparation, Analysis, and Advanced Calculations)*
1. **TTDPB01: Power BI: Essentials (2 days)**. Foundation for all learners.
2. **TTDPB03: Power BI: Data Transformation & Modeling (2 days).** Learn Power Query and data modeling best practices.
3. **TTDPB05: Power BI: Mastering DAX for Data Analysis (1 day)**. Essential for writing complex calculations and optimizing analysis.
4. *(Optional)* **TTDPB04**: **Power BI: Creating Reports (1 day)**. If they also need to design and present reports.

For Data Engineers *(Focus: Data Preparation & Optimization)*
1. **TTDPB01: Power BI: Essentials (2 days).** Foundation for all learners.
2. **TTDPB03: Power BI: Data Transformation & Modeling (2 days).** Core course for data cleaning and model structuring.
3. *(Optional)* **TTDPB05: Power BI: Mastering DAX for Data Analysis (1 day).** If you need to optimize performance with calculated measures.

Pre-Requisites

To ensure a smooth learning experience and maximize the benefits of attending this course, you should have the following prerequisite skills:

- A general knowledge of database concepts (fields, records, relationships)
- An awareness of key business priorities such as revenue, profitability, and financial accounting is desirable.
- Familiarity with Excel would also be helpful.

Agenda

Please note that this list of topics is based on our standard course offering, evolved from typical industry uses and trends. We will work with you to tune this course and level of coverage to target the skills you need most. Topics, agenda and labs are subject to change, and may adjust during live delivery based on audience skill level, interests and participation.

1. Introduction to the Power BI ecosystem

- What is Power BI?
- Overview of the Power BI Ecosystem
  - Power Query Editor; Power BI Desktop; Power BI Service
- Tour of the Power BI Desktop
- Tour of the Power Query Editor

2. The Extract, Transform, Load process

- Introduction to the Power Query Editor
- Clean and transform raw data using the ribbon
- Mastering data types
- Understanding some of the PQE 'rules'
- Leveraging Applied Steps
- Finding nulls/blanks/empties
- Adding custom columns
- Removing unnecessary columns
- Introduction to the 'M' language
- Modifying the M in the Formula Bar
- Merging/appending data sources

- Saving/applying transformations

3. Creating the data model

- What is a data model? Why is it necessary?
- Reviewing relationships/creating new ones
  - One to many; Many to many; One to one
- Using basic DAX to add data
  - Measures; Calculated columns; Tables
- Introduction to filter context and DAX

4. Enhancing the semantic model

- Hierarchies
- Hidden fields
- Adding synonyms
- Adding descriptions

5. Creating a date table

- Why is a date table necessary?
- Where is the date table created?
- Creating a basic date table
- Connecting in a date table

6. Creating a report

- Formatting pages and using themes
- Choosing and placing visuals
- Formatting visuals
- Visual header controls
- Editing visual interactions
- Slicers and the filter panel
- Syncing slicers
- Formatting tooltips/creating a tooltip page
- Creating a drill through
- Understanding and evaluating page/visual performance

7. Publish a report and semantic model

- Publish the report to a designated workspace
- Tour of the Power BI Service
- Apps; Workspaces; My workspace
- Review of the five types of a content a workspace can store

- Reports; Dashboards; Datasets; Dataflows; Apps

8. Understanding Workspaces

- Viewing a report or dashboard
- Review of menu options
- Understanding editing privileges in Workspaces
- Review of menu options in edit mode
- Editing a report and saving changes
- Creating a dashboard
- Setting up a refresh schedule
- Creating an app and defining audiences
- Publishing a report or dashboard to an app

Follow On Courses

TTDPB05	Power BI: Mastering DAX for Data Analysis
TTDPB04	Power BI: Creating Reports
TTDPB03	Power BI: Data Transformation and Modeling

Related Courses

TTDPB05	Power BI: Mastering DAX for Data Analysis
TTDPB03	Power BI: Data Transformation and Modeling
TTDPB01	Power BI Essentials
TTDPB04	Power BI: Creating Reports

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Regardless of setup option, we will collaborate with you to ensure your team is set up and ready to go well in advance of the class.

For More Information

Please contact us or call 844-475-4559 toll free for more information about our training services (instructor-led, self-paced or blended), coaching and mentoring services, public course enrollment or questions, partner programs, courseware licensing options and more.