100 XP

Introduction to Power BI

2 minutes

Microsoft's Power BI is a business analytics tool designed to provide users with comprehensive data analysis and visualization capabilities. It empowers organizations to connect to a wide array of data sources, ranging from simple Excel sheets to complex databases, and transform this data into interactive, insightful dashboards and reports.

With Power BI, users can create and share reports that highlight key performance indicators (KPIs) and trends, facilitating informed decision-making across all levels of an organization.

Its features include real-time analytics, the ability to perform ad-hoc analysis, and the seamless integration with other Microsoft products such as Azure and Office 365, enhancing productivity and collaboration. Power BI's interface and robust data modeling options make it accessible to data professionals and business users alike, ensuring that valuable data insights are always at your fingertips.

Throughout this course, you'll learn how to use these tools made available by Power BI, and acquire the skills to start building your own reports and start analyzing data like a pro.

The course focuses on the main components of Power BI Desktop. These sections highlight the features available in Power BI Desktop and walk the user through the process of bringing in data from data sources, organizing data in a model, and creating visualizations.

This course includes steps for the user to follow along, with associated screenshots that provide a visual aid. In the screenshots, sections are highlighted with red boxes to indicate the area the user needs to focus on.

Next unit: Install the Power BI Desktop application

Continue

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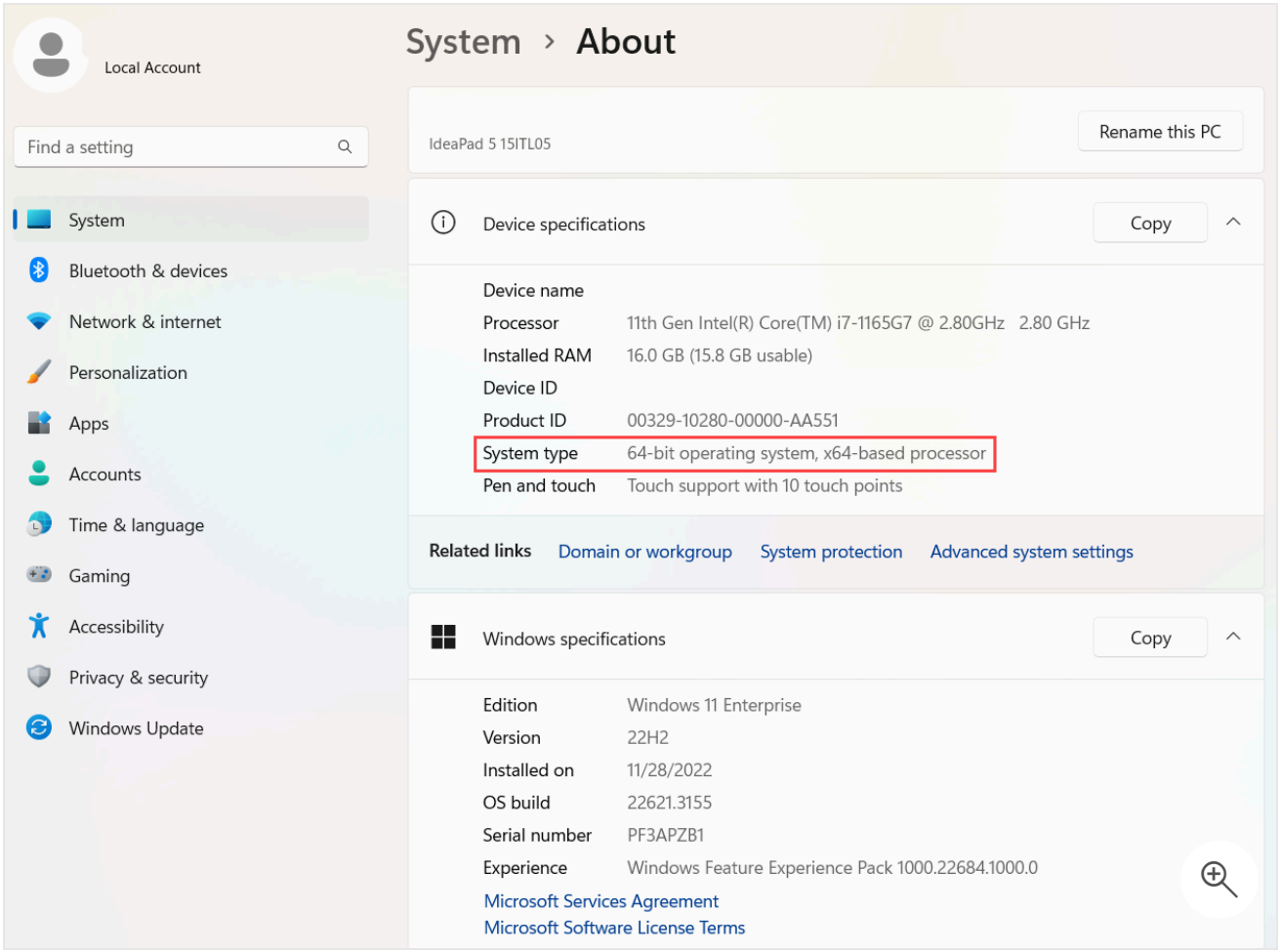
Install the Power BI Desktop application

10 minutes

> **Note**
>
> Power BI Desktop is only available on Windows operating systems. For Mac users consider Boot Camp to setup a Windows partition on your Mac computer. https://support.apple.com/guide/mac-help/use-windows-on-your-mac-mh11850/mac

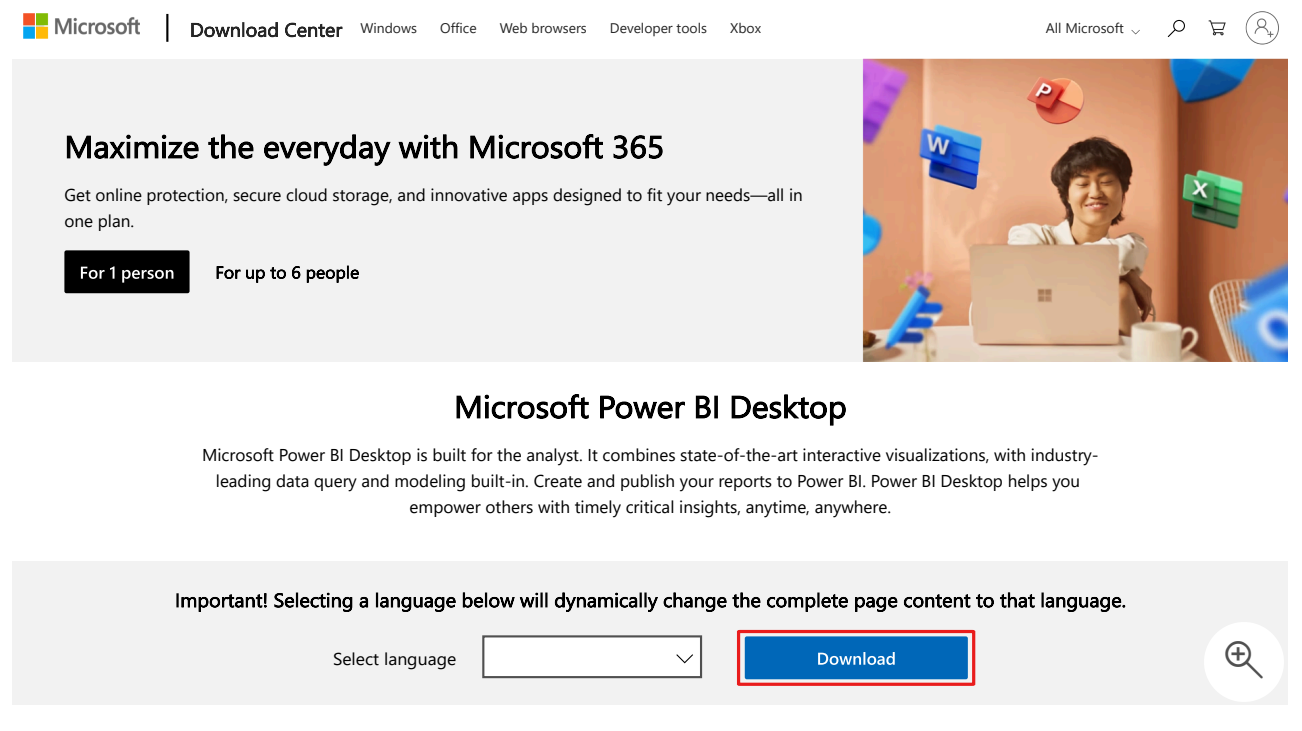
You must first verify if you have a 32-bit or a 64-bit Windows operating system. To check your operating system type:

1. From your Windows operating system, open **Control Panel,** select **System and Security**, and then choose **System**.
2. You'll be able to identify if your operating system is 32-bit or 64-bit based on the **System type** field as shown in the screenshot below.

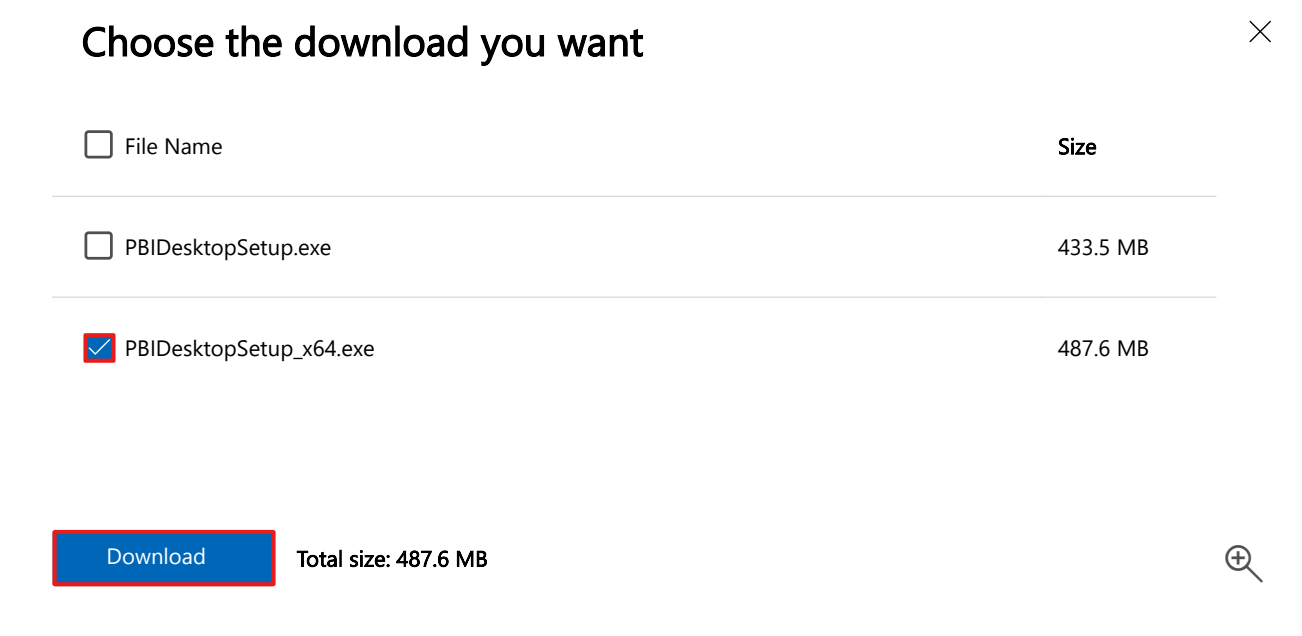


You must download and install **Power BI Desktop** using any one of the options listed below:

Download and install the **Microsoft Power BI Desktop** from https://aka.ms/pbiSingleInstaller .

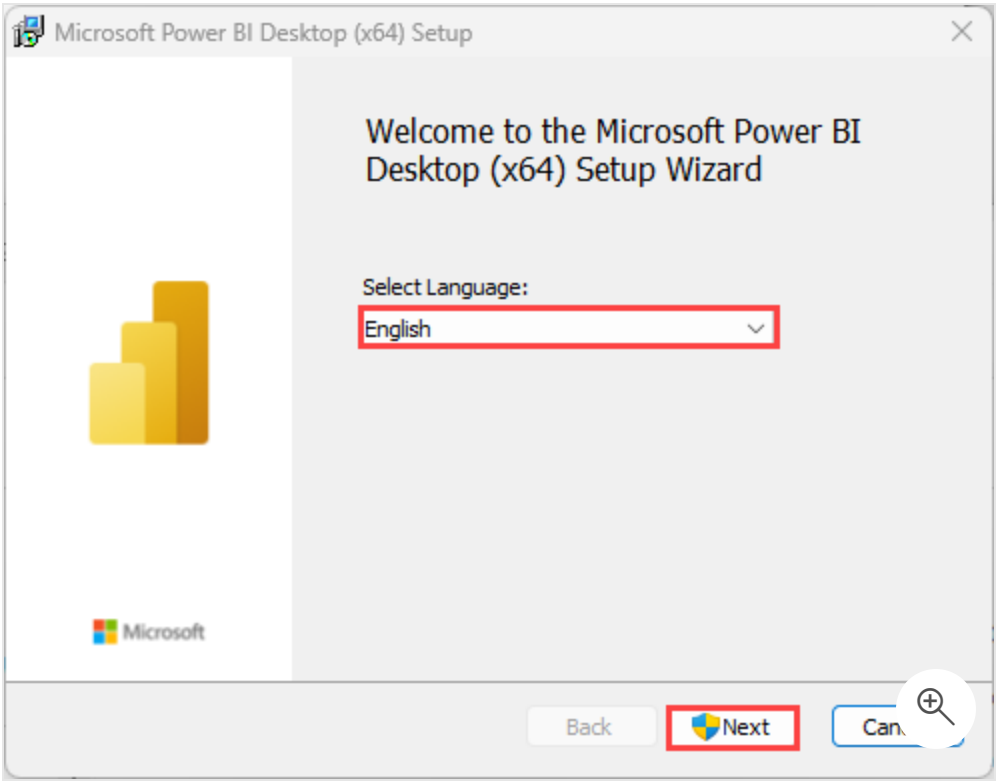


3. If you have a 64-bit Operating System, select the **PBIDesktopSetup_x64.exe** box or if you have a 32-bit Operating System select the **PBIDesktopSetup.exe** box and select **Download**.



4. After the download is finished, open the file appropriately named either PBIDesktopSetup_x64.exe or PBIDesktopSetup.exe.

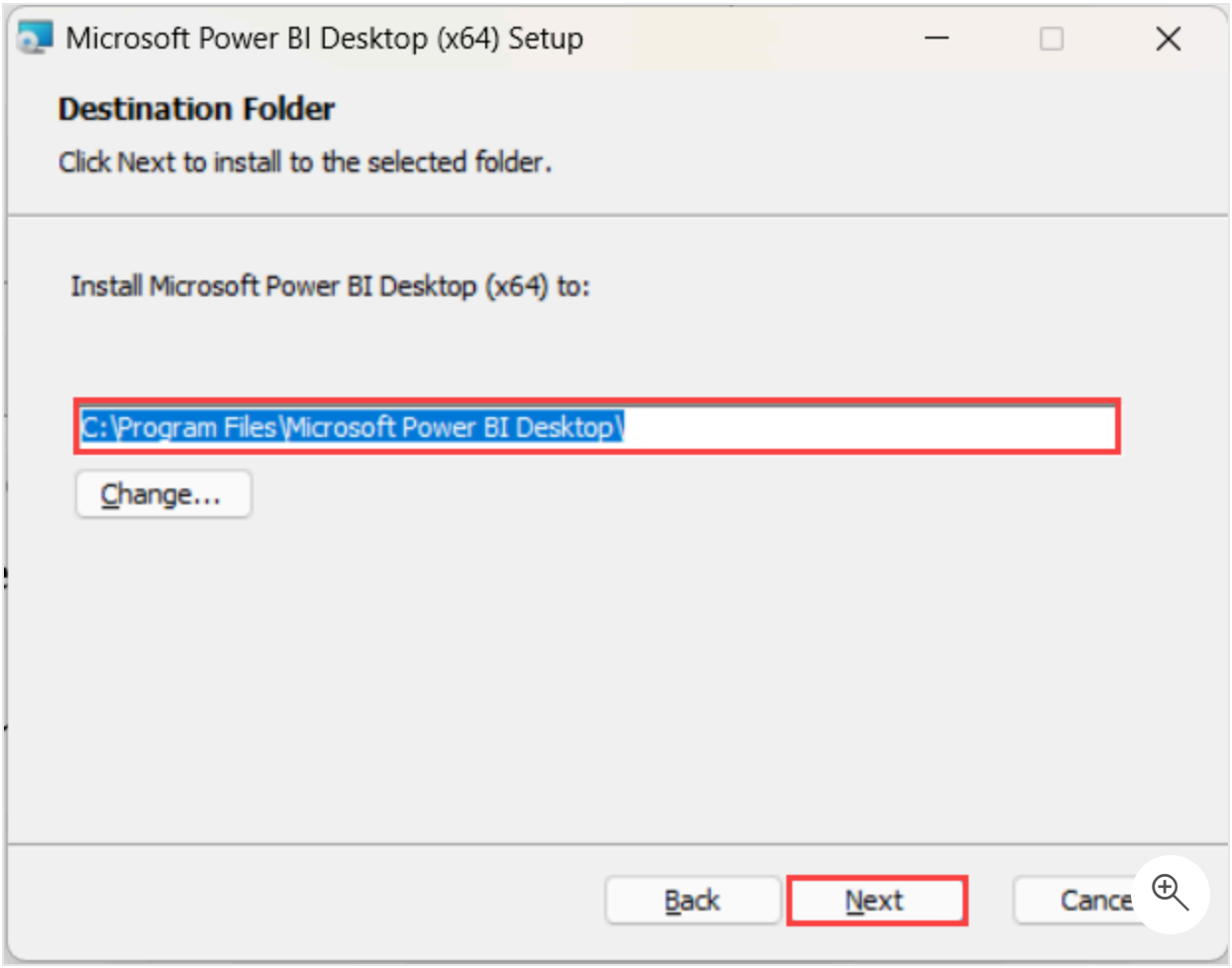
5. In the pop-up window for the Power BI Setup Wizard, select your preferred **Language** and select **Next**.



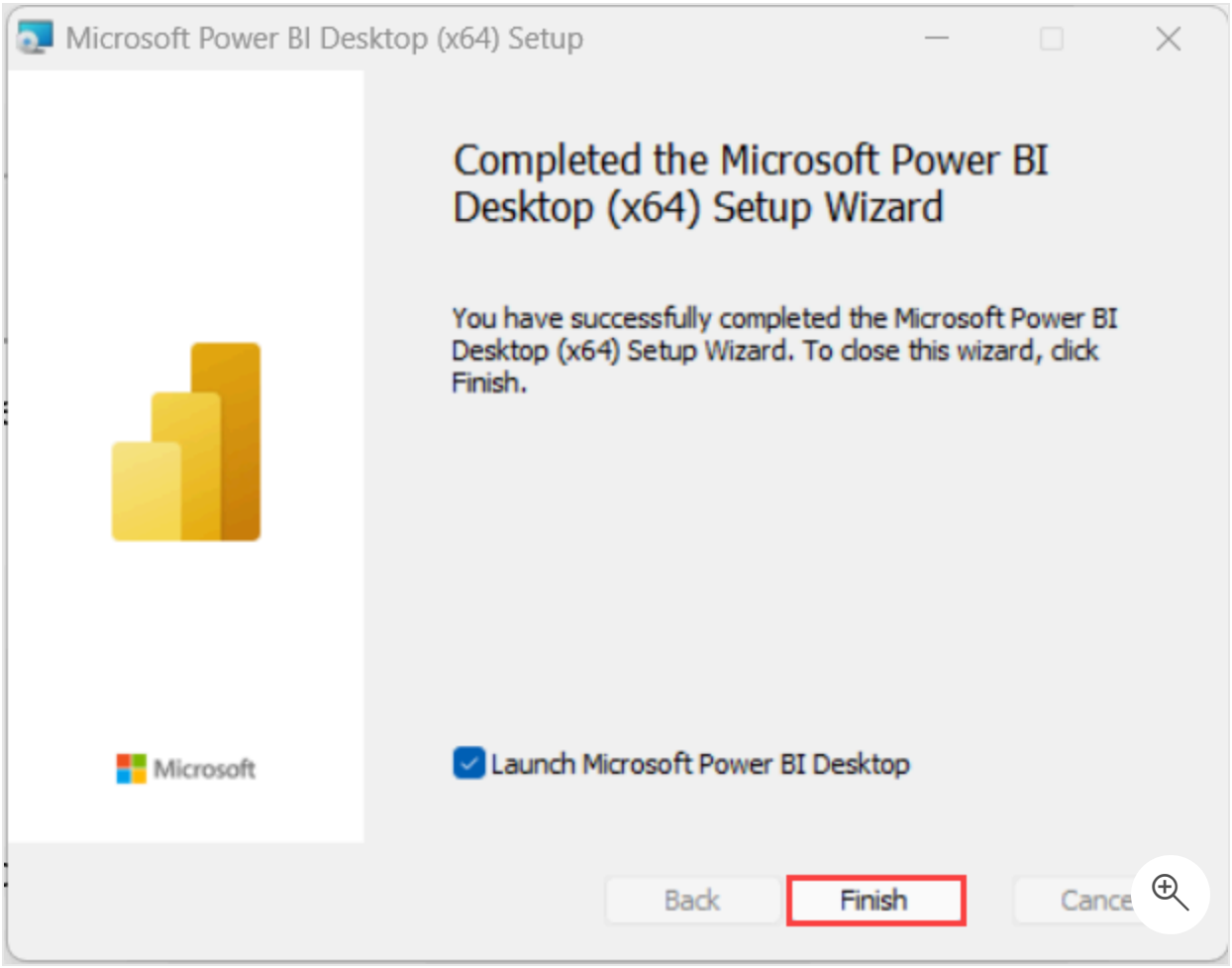
6. After the Setup Wizard computes the space requirements, select **Next**.

7. **Accept** the terms in the License Agreement and select **Next**.

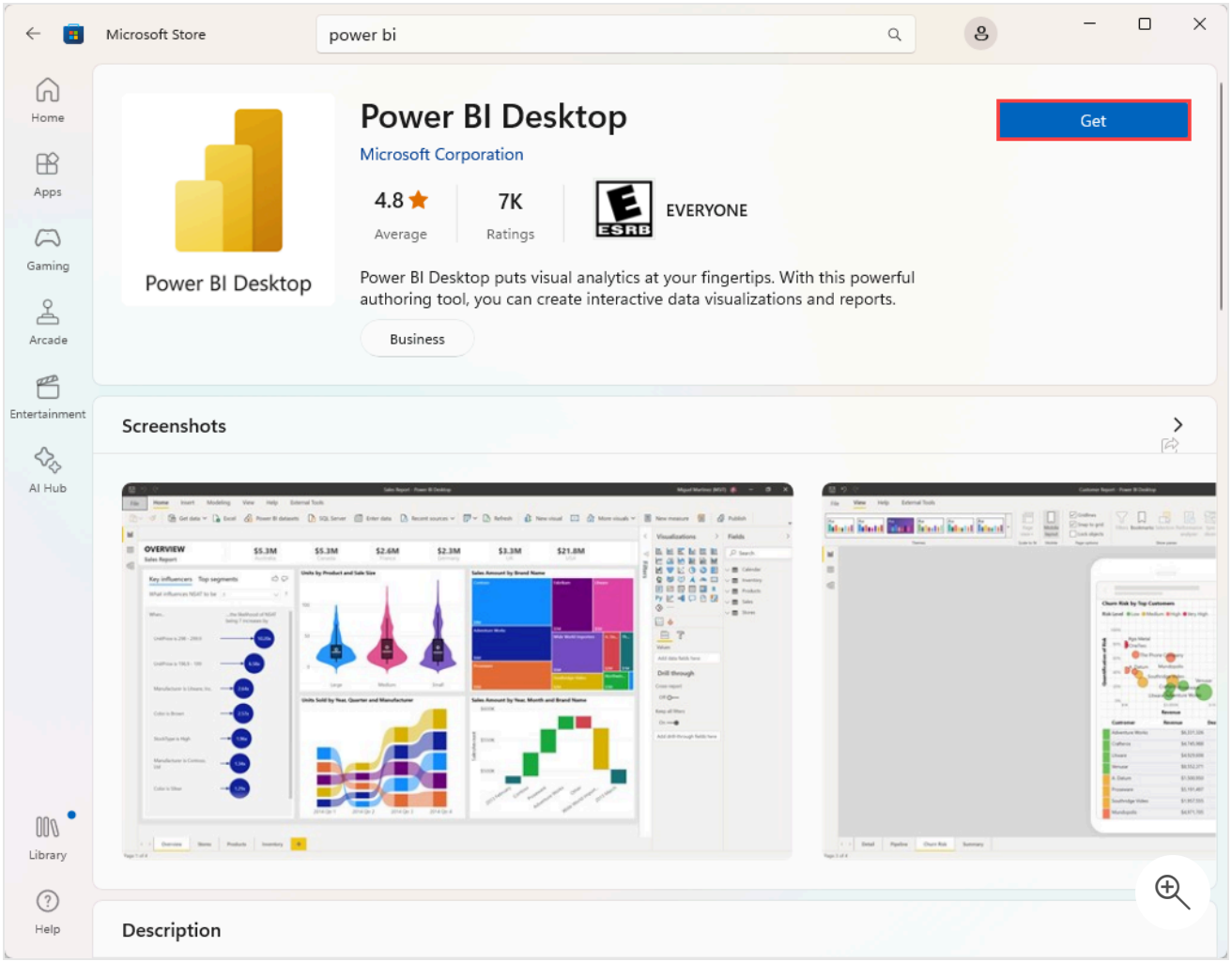
8. Choose where Power BI should be installed and **select** Next. It's best practice to keep Power BI in the Program Files of your C: drive, and should automatically install to the **C:\Program Files\Microsoft Power BI Desktop** directory.



9. Finally **select** Finish.



Or if you have Windows 10 or later, you can use the Microsoft App Store to download and install the Power BI Desktop app.



If you already have Power BI Desktop installed, ensure you have the latest version downloaded and installed.

Next unit: Tour of Power BI Desktop

Continue >

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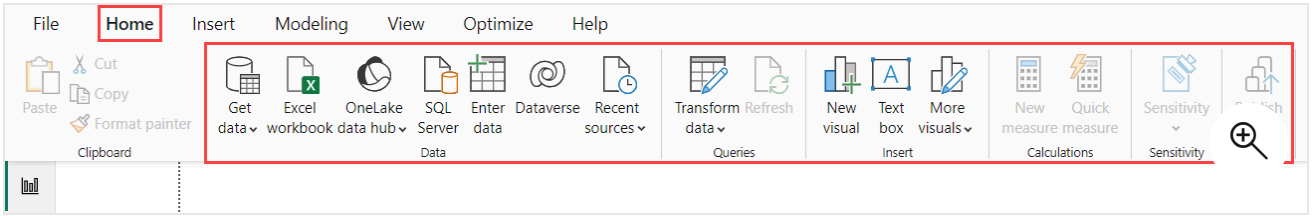
Tour of Power BI Desktop

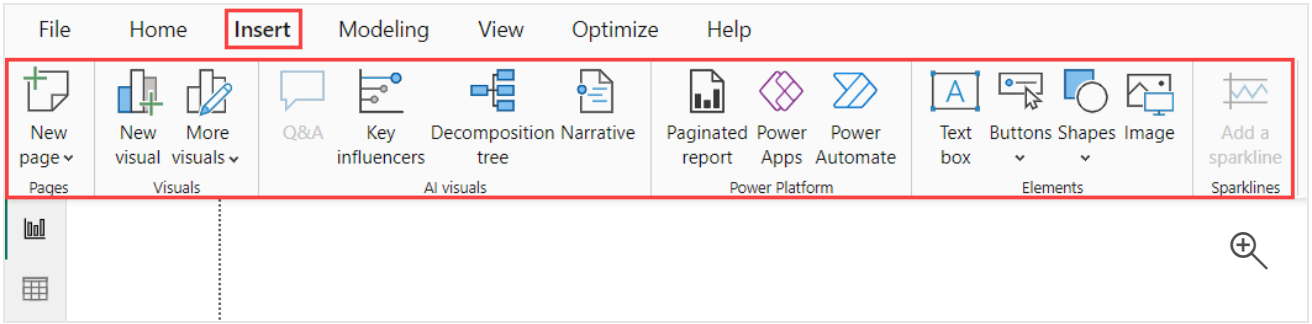
10 minutes

In this section, we'll learn about the key parts of the Power BI desktop , where we'll ingest data, design data models and build visuals to explore our data.

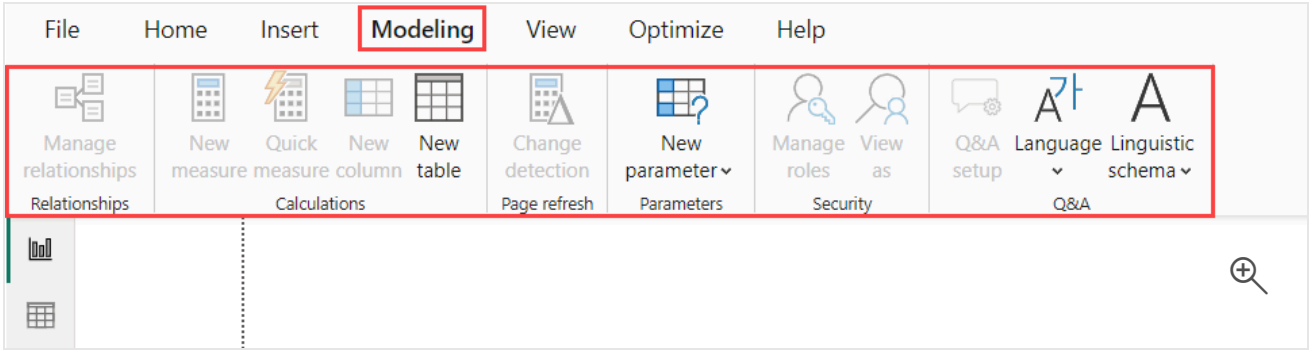
1. At the top of the window within the ribbon, you'll see the **Home** tab where the most common operations you perform are available.



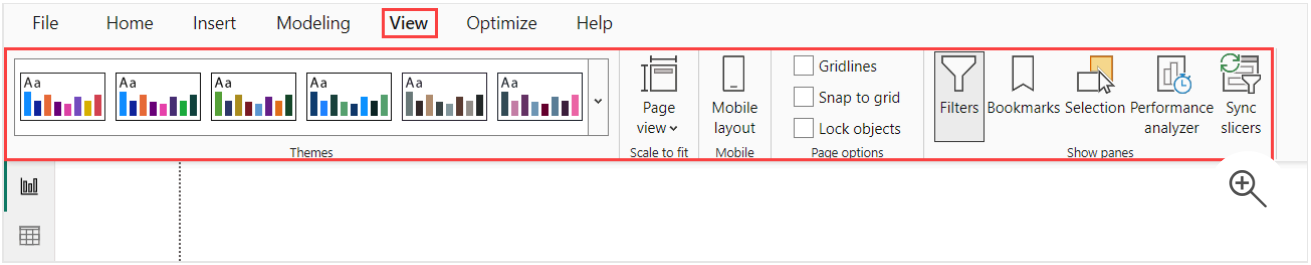
2. The **Insert** tab in the ribbon allows you to insert shapes, a textbox, or new visuals.



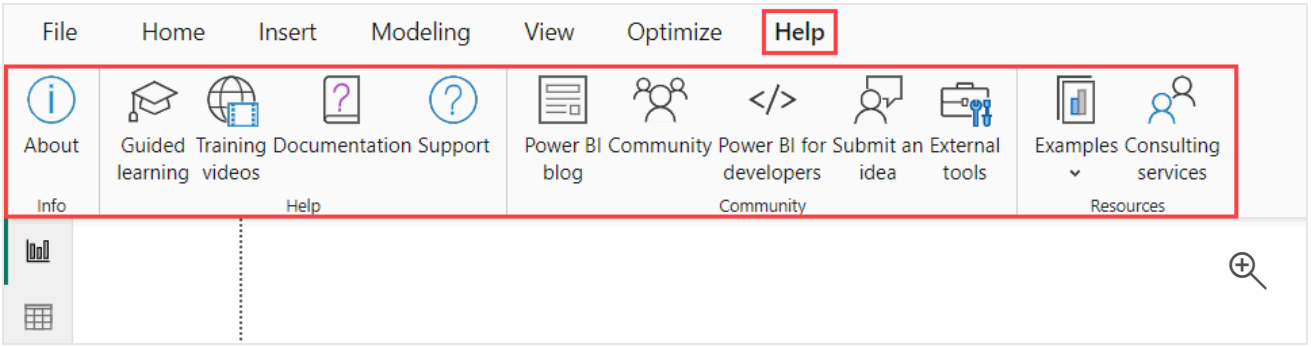
3. The **Modeling** tab in the ribbon enables additional data modeling capabilities like adding custom columns and calculating measures.



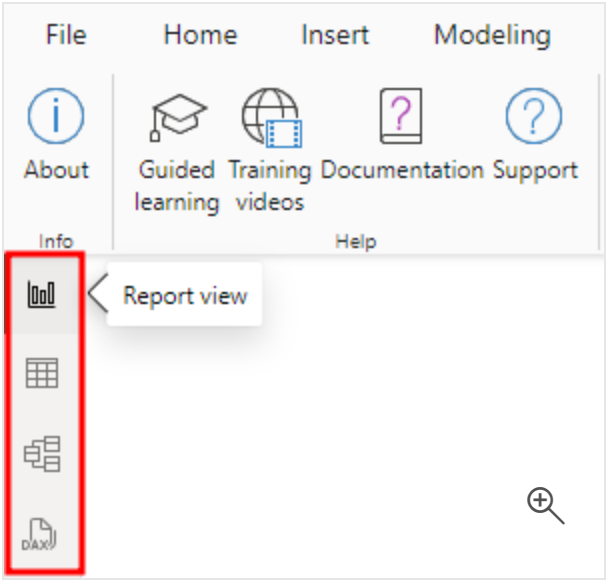
4. The **View** tab has options to format the page layout.



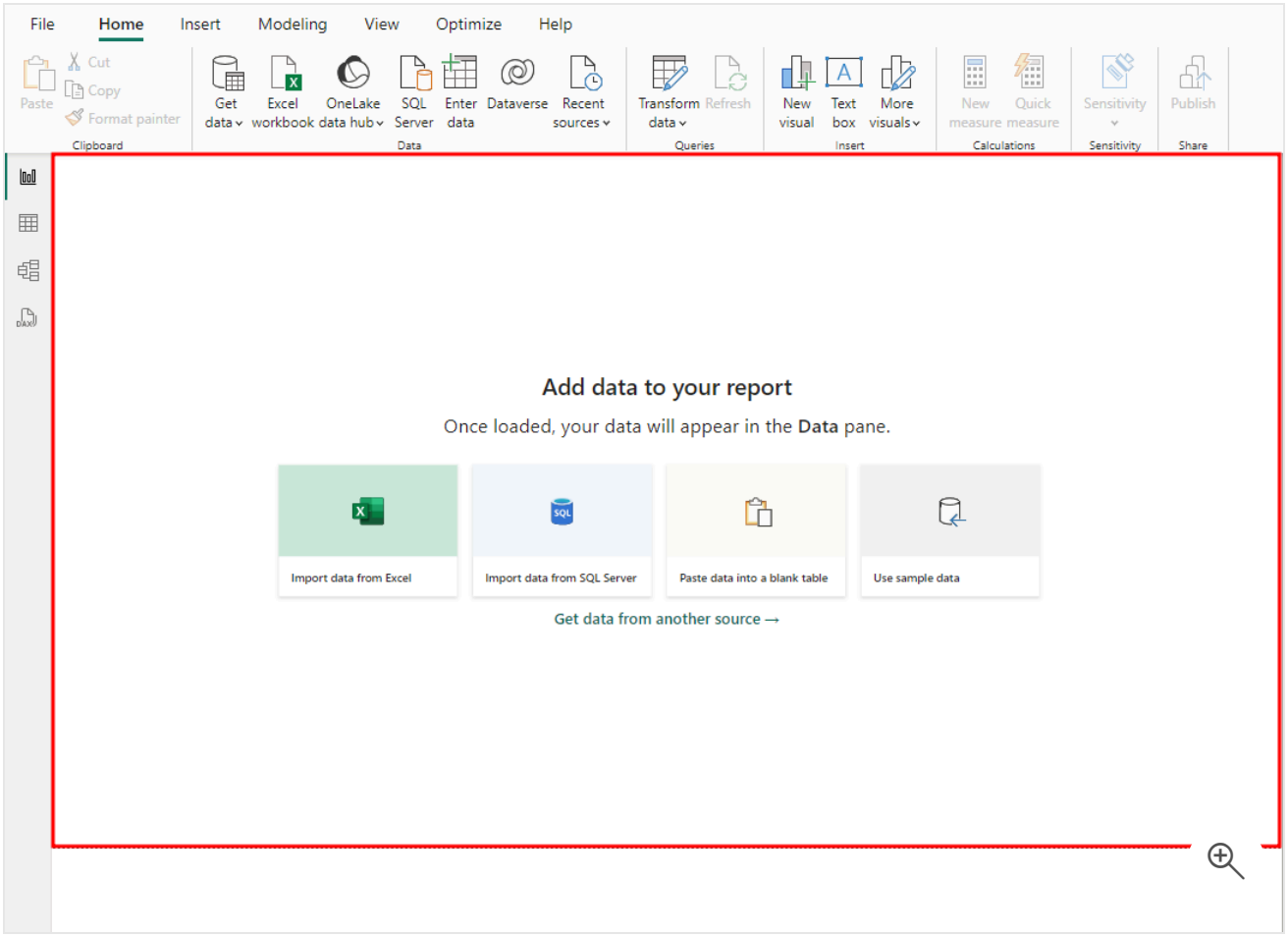
5. The **Help** tab provides self-help options like guided learning, training videos and links to online communities, partner showcases and consulting services.



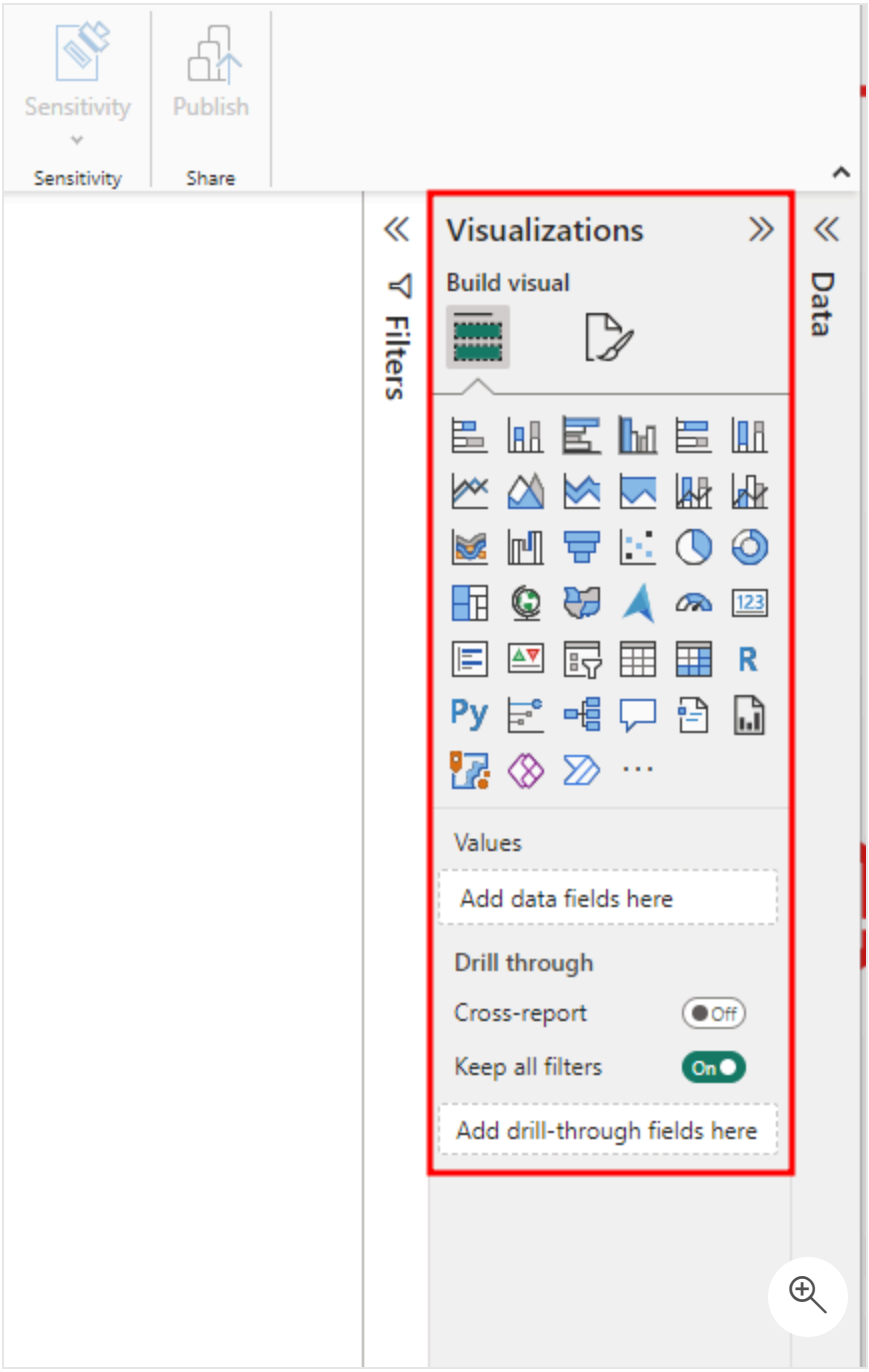
6. On the left side of the window, you have four icons within the **Navigation** menu: **Report View, Table View**, **Model View**, and **DAX Query View**. If you hover over the icons, you can see the **tooltips**. Switching between these allows you to see the data and the relationships between the tables.



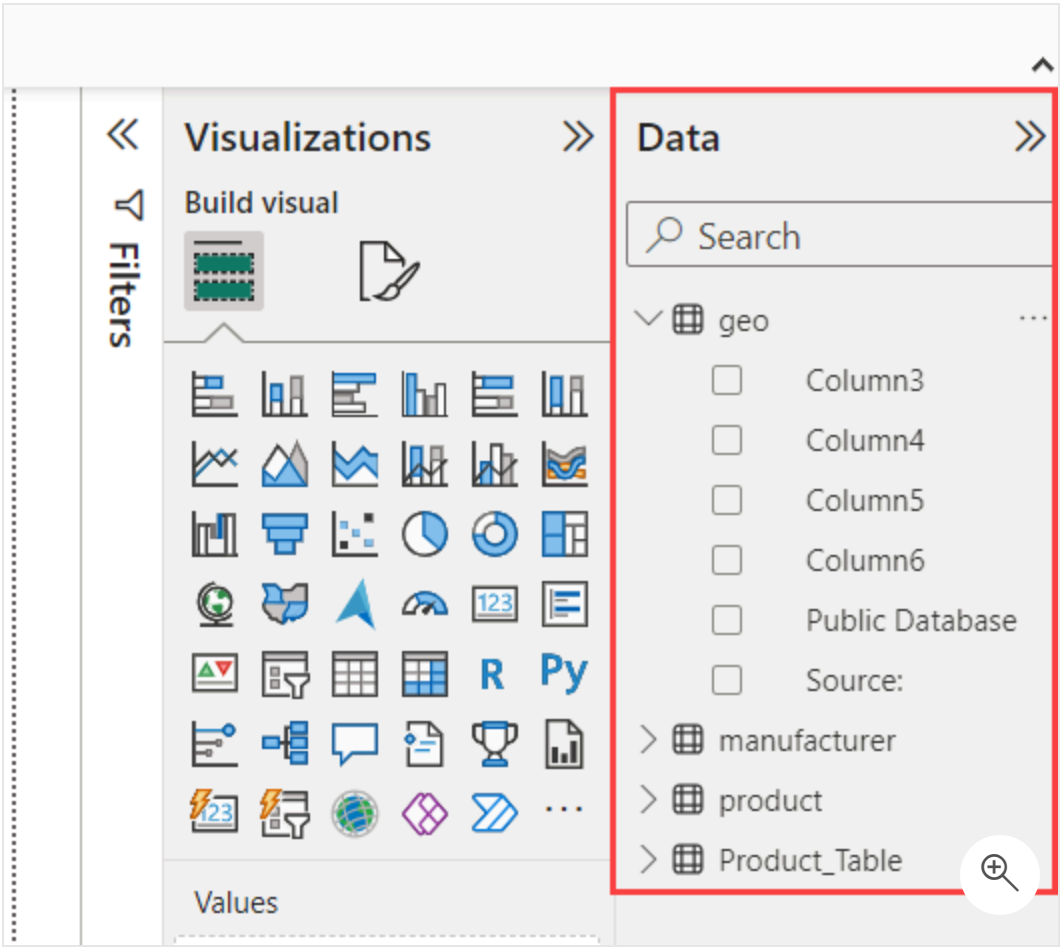
7. The center **white space** is the canvas where you'll be creating visuals.



8. The **Visualizations** pane on the right-side of the window allows you to select visualizations, add values to the visuals, and add columns to the axis or filters.



9. The **Data** pane is where you see the list of tables, which are generated from queries. By selecting the arrow next to a table name, you can expand the list of fields for that table.



Next unit: Unzip the course files

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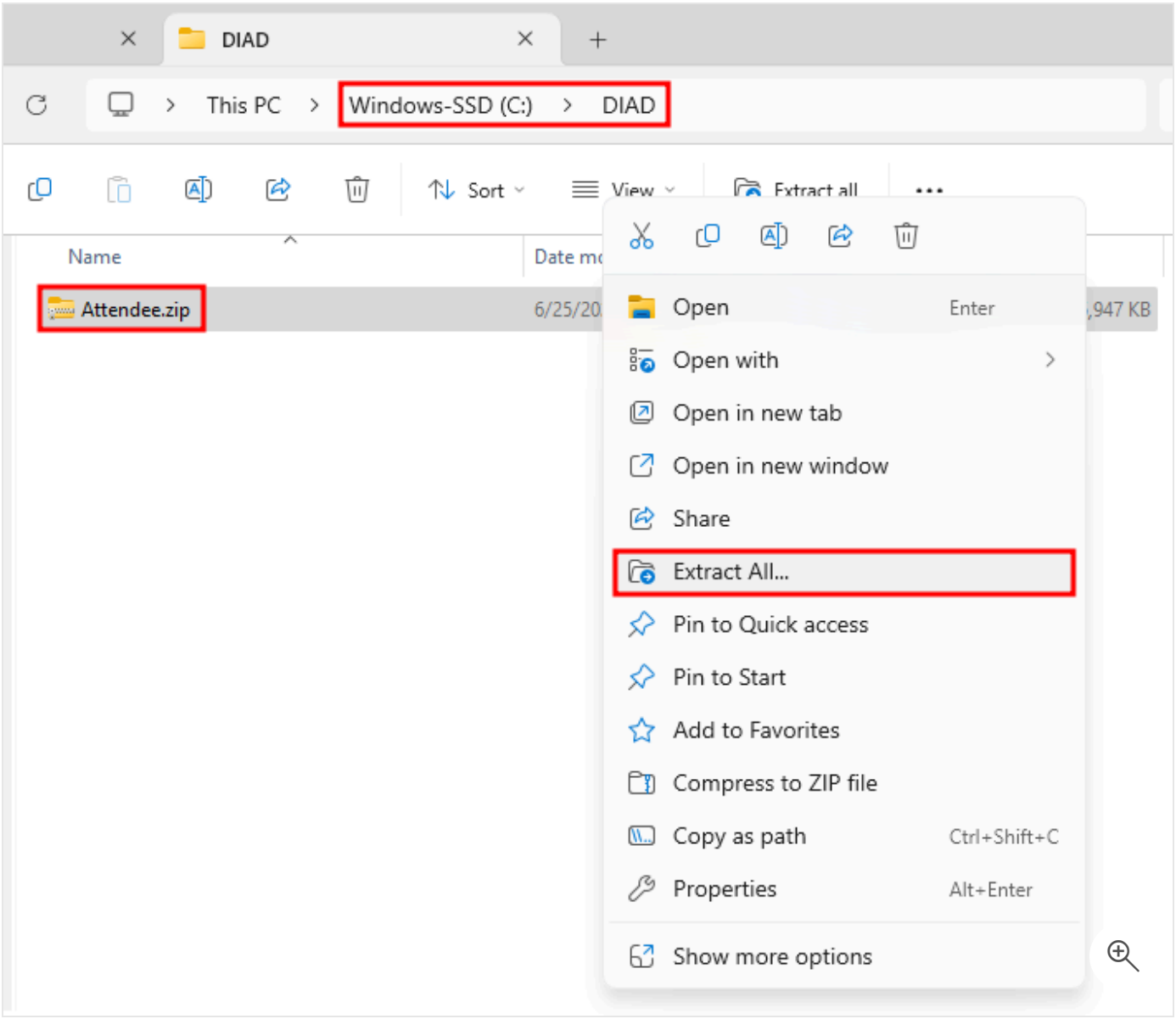
Unzip the course files

5 minutes

You must download and unzip the Dashboard in a Day (DIAD) class content.

1. Download the DIAD starter files .
2. Create a folder called DIAD on the C: drive of your local computer.
3. Copy all contents from the student files to the DIAD folder you created (C:\DIAD).
4. If you're unfamiliar with how to unzip files, you right-click on the Attendee.zip file and select Extract All.



> **Note**
>
> Users should use their own files for each lab. The solutions provided for each lab are a final product to reference. The solutions are not meant to be the starting point for each lab.

Your `C:\DIAD\` directory should now have the folders **Data** and **Reports** in its root.

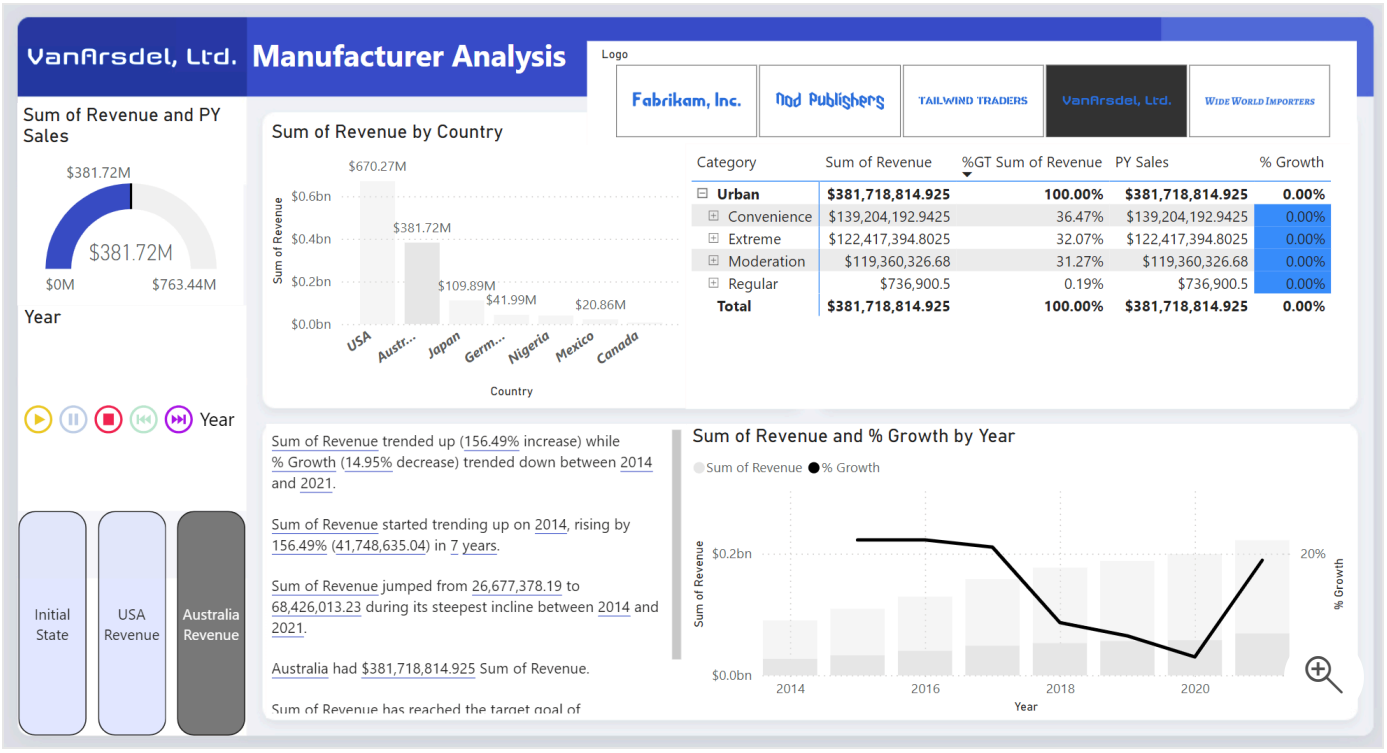
The dataset you'll use for the Dashboard in a Day class is a sales and market share analysis. This type of analysis is common for a Chief Marketing Officer (CMO). Unlike the Chief Financial Officer (CFO), a CMO is focused not only on the company's performance internally (how well our products sell) but also externally (how well we do against competing products).

The company VanArsdel, Ltd. manufactures expensive retail products that can be used for fun and work. This company sells their products directly to consumers nationwide and in several other

countries.

> **Note**
>
> There is a problem with the Nigeria International Sales data; this is by design so that users can learn how to shape data.

By the end of the class, you'll build a report, which will look like the screenshot below.



Next unit: Check your knowledge

Continue >

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Summary

2 minutes

In this module, you learned about Microsoft's Power BI Desktop, how to install Power BI Desktop, and how to extract the course files.

Learned concepts:

- Power BI's use as a business analytics tool, learning how it empowers organizations with a wide array of data sources and the ability to transform this data into interactive dashboards and reports.
- Power BI's interface, including the different organizational ribbon tabs and their uses.
  - Home
  - Insert
  - Modeling
  - View
  - Help
- Power BI's Data and Visualization panes
- The process of both downloading and installing Power BI Desktop
- How to extract a compressed file into a directory

Module incomplete:

Go back to finish