

Introduction to Power BI

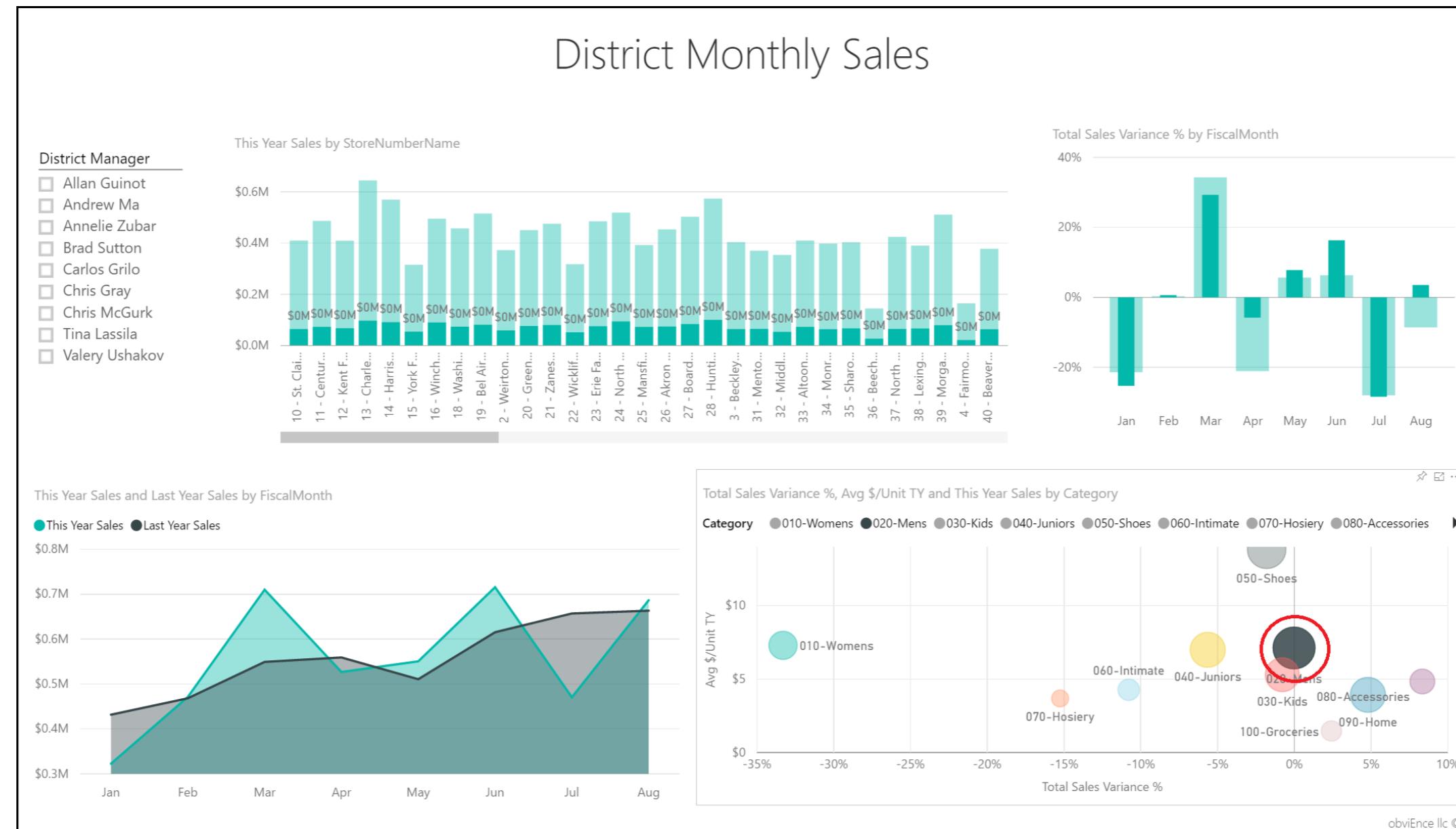
INTRODUCTION TO POWER BI



Lis Sulmont

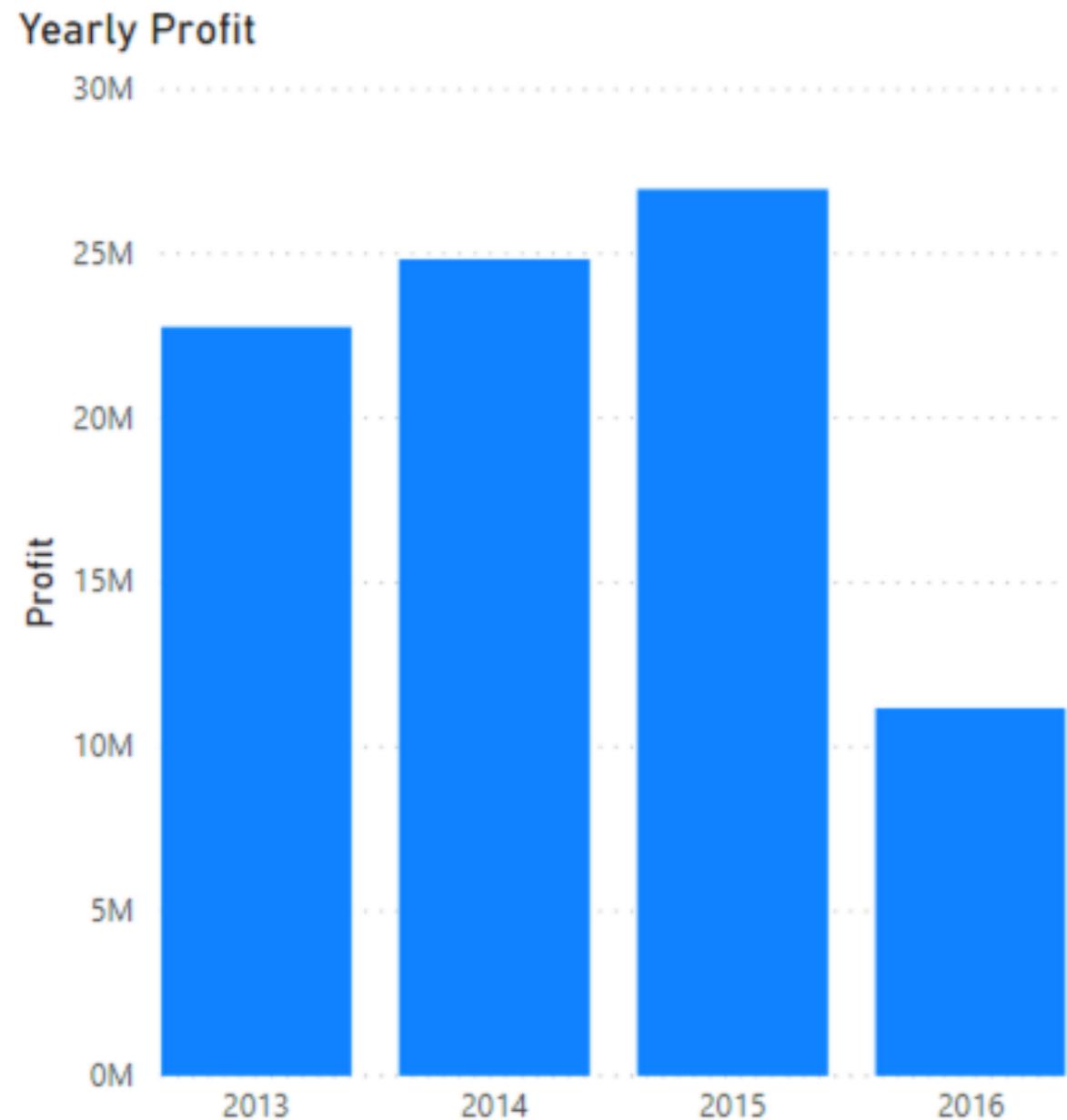
Curriculum Manager, DataCamp

What is Power BI?



¹ <https://docs.microsoft.com/en-us/power-bi/create-reports/sample-retail-analysis>

Data Visualization in Power BI



Total Excluding Tax	Tax Amount	Profit	Total Including Tax
129	19.35	67.5	148.35
258	38.7	135	296.7
301	45.15	157.5	346.15
172	25.8	90	197.8
86	12.9	45	98.9
387	58.05	202.5	445.05
387	58.05	202.5	445.05
387	58.05	202.5	445.05
344	51.6	180	395.6
344	51.6	180	395.6
344	51.6	180	395.6
344	51.6	180	395.6
344	51.6	180	395.6
258	38.7	135	296.7
258	38.7	135	296.7
...

Why Power BI?

- Leading data visualization tool according to Gartner
- Over 97% of Fortune 500 companies use Power BI
- Over 6 million customers



Power BI Components

Power BI Desktop

- Desktop version
- Data analysis and report creation tool
- Includes the Power Query Editor
- 100% free

Power BI service

- Cloud-based version
- Light report editing
- Share and distribute reports

Power BI Pro

Exclusive features:

- Publish and share across the Power BI cloud platform
- Mobile app
- Collaborate with other Power BI users

Power BI Interface

The image displays three distinct views of the Power BI interface:

- Power BI Desktop:** Shows the main menu with "Get data" and "Recent sources" highlighted with red boxes. A list of recent reports is shown, with the first item, "2.2.6ScreencastStart.pbix" from "C: » Users » Public » Documents", also highlighted with a red box.
- Sign-in Page:** Features a large user icon and the text "Sign in to collaborate and share content". It explains that Power BI Pro enables collaboration across departments and distributing content. Two buttons are present: "Try free" (white background) and "Sign in" (yellow background).
- Promotional Card:** A yellow card with the word "Close" in red at the top right, accompanied by a red X icon. It includes sections for "WHAT'S NEW" (describing monthly updates), "POWER BI BLOG" (describing news and resources), "FORUMS" (describing the Power BI Forum), and "TUTORIALS" (describing learning resources). Each section has a brief description and a link.

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

Income Expense

■ Select all
■ 2020
■ 2019
■ 2018
■ 2017
■ 2016
■ 2015

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn
1bn
0bn

MonthName November December May July August June October April September March February January

Filters

Search

Filters on this page ...
Add data fields here

Filters on all pages ...
Add data fields here

Visualizations

Search

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

Values

Add data fields here

Drill through

Cross-report

Off Keep all filters On
Add drill-through fields here

1 53.64bn

2 Amount

3

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn
1bn
0bn

MonthName November December May July August June October April September March February January

ScenarioName Audio Cameras and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video Audio Books

Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	4,593,694,374.88	218,933,396.02	5,665,988,969.42	230,738,587.69	2,485,487,457.19
Budget	256,826,621.81	3,347,605,529.68	1,208,041,332.59	4,307,849,337.57	207,049,792.29	5,299,115,246.06	215,317,906.62	2,330,834,374.94
Forecast	273,397,435.67	3,572,004,626.25	1,285,330,168.28	4,585,888,066.58	219,730,520.95	5,664,411,752.04	229,865,165.02	2,296,131,319.12
Total	803,305,814.64	10,506,702,494.30	3,781,181,962.35	13,487,431,779.03	645,713,709.26	16,629,515,967.52	675,921,659.33	7,112,453,151.25

Page 1 +

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Report View

Amount by AccountType

Expense

Amount by MonthName and ScenarioName

ScenarioName: Actual (blue), Budget (dark blue), Forecast (orange)

2bn
1bn
0bn

MonthName: November, December, May, July, August, June, October, April, September, March, February, January

Values

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

Filters

Search

Select all

- 2020
- 2019
- 2018
- 2017
- 2016
- 2015

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Visualizations

Fields

Search

DimAccount

DimDate

DimProductCateg...

DimScenario

FactStrategyPlan

Scenario Name

Scenario Name	Audio	Cameras and camcorders	Cell phones	Computers	Games and Toys	Home Appliances	Music, Movies and Audio Books	TV and Video
Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	4,593,694,374.88	218,933,396.02	5,665,988,969.42	230,738,587.69	2,485,487,457.19
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Page 1 **+**

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Help Table tools

Name DimAccount

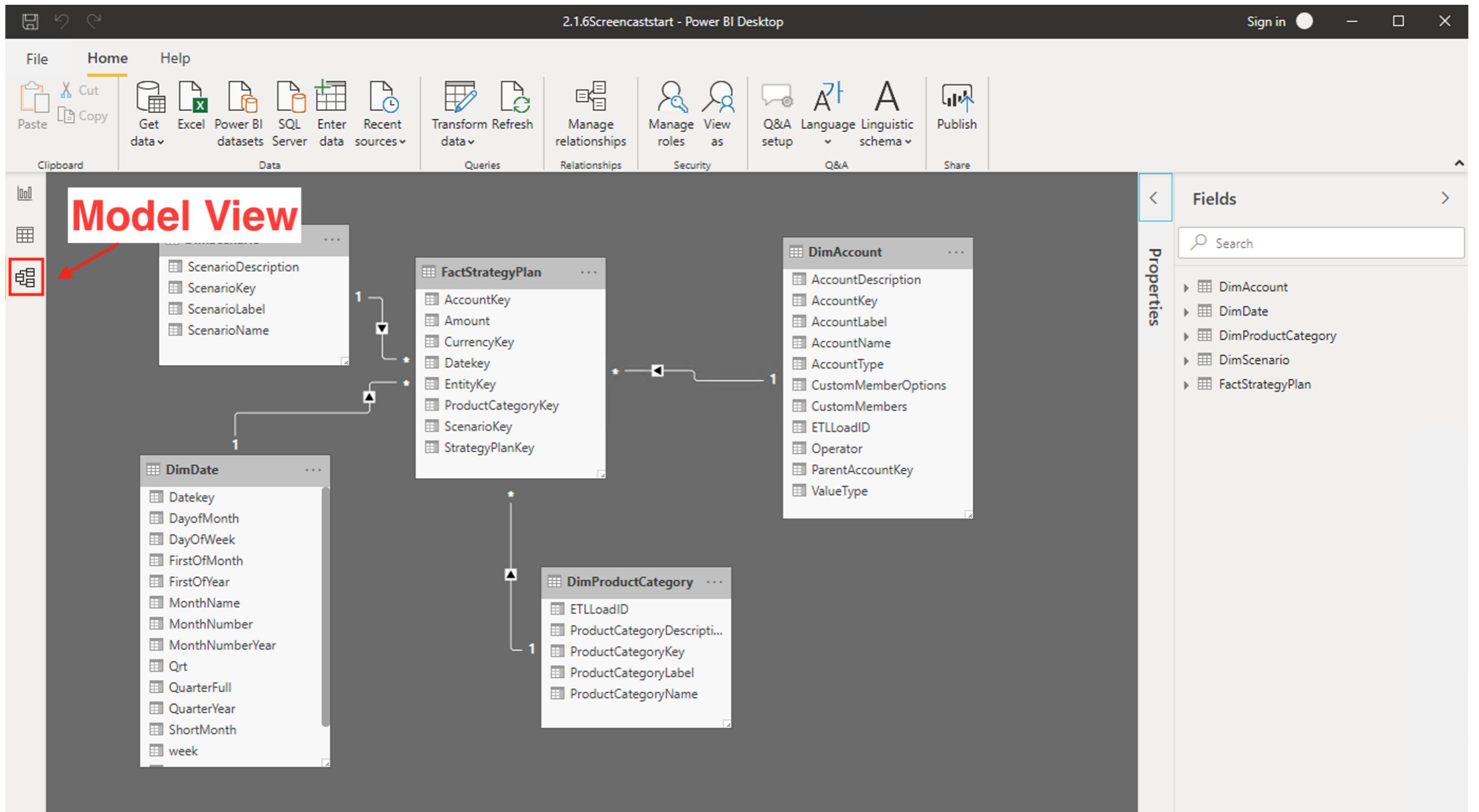
Mark as date table Manage relationships New measure Quick measure New column New table

Structure Calendars Relationships Calculations

Data View

Fields Search DimAccount AccountDescription AccountKey AccountLabel AccountName AccountType Operator CustomMembers ValueType CustomM...

	AccountKey	ParentAccountKey	AccountLabel	AccountName	AccountDescription	AccountType	Operator	CustomMembers	ValueType	CustomM...
1	NULL		100000	Profit and Loss after tax	Profit and Loss after tax	NULL	NULL	NULL	NULL	NULL
111000				Income	Income	Income	+	NULL	Income	+
112000				Expense	Expense	Expense	-	NULL	Expense	-
110100	2			Sale Revenue	Sale Revenue	Income	+	NULL	Income	+
112100	3			Cost of Goods Sold	Cost of Goods Sold	Expense	+	NULL	Expense	+
112200	3			Selling, General & Administrative Expenses	Selling, General & Administrative Expenses	Expense	+	NULL	Expense	+
112300	6			Administration Expense	Administration Expense	Expense	+	NULL	Expense	+
112400	6			IT Cost	IT Cost	Expense	+	NULL	Expense	+
112500	6			Human Capital	Human Capital	Expense	+	NULL	Expense	+
112600	6			Light, Heat, Communication Cost	Light, Heat, Communication Cost	Expense	+	NULL	Expense	+
112700	6			Property Costs	Property Costs	Expense	+	NULL	Expense	+
112800	6			Other Expenses	Other Expenses	Expense	+	NULL	Expense	+
112900	6			Marketing Cost	Marketing & Advertisement Cost	Expense	+	NULL	Expense	+
112910	13			Holiday Ad Cost	Holiday Ad Cost	Expense	+	NULL	Expense	+
112920	13			Spring Ad Cost	Spring Ad Cost	Expense	+	NULL	Expense	+
112930	13			Back-to-School Ad Cost	Back-to-School Ad Cost	Expense	+	NULL	Expense	+
112940	13			Business Ad Cost	Business Ad Cost	Expense	+	NULL	Expense	+
112950	13			Tax Time / Summer Ad Cost	Tax Time / Summer Ad Cost	Expense	+	NULL	Expense	+
131000	1			Taxation	Taxation	Taxation	-	NULL	Taxation	-
112911	14			Radio & TV	Holiday Ad Cost by Radio & TV	Expense	+	NULL	Expense	+
112912	14			Print	Holiday Ad Cost by Print	Expense	+	NULL	Expense	+
112913	14			Internet	Holiday Ad Cost by Internet	Expense	+	NULL	Expense	+
112914	14			Other	Holiday Ad Cost by Other	Expense	+	NULL	Expense	+
110000	1			Profit and Loss before tax	Profit and Loss before tax	NULL	+	NULL	NULL	+



2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

53.64bn Amount

Income Expense

■ Select all
■ 2020
■ 2019
■ 2018
■ 2017
■ 2016
■ 2015

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn
1bn
0bn

MonthName November December May July August June October April September March February January

ScenarioName Audio cameras and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video Audio Books

	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total							
Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	10,506,702,494.30	3,572,004,626.25	3,347,605,529.68	1,208,041,332.59	3,781,181,962.35	4,593,694,374.88	4,307,849,337.57	218,933,396.02	13,487,431,779.03	207,049,792.29	645,713,709.26	219,730,520.95	5,299,115,246.06	5,664,411,752.04	230,738,587.69	229,865,165.02	215,317,906.62	229,6131,319.12	675,921,659.33	7,112,453,151.25	2,485,487,457.19	2,330,834,374.94	2,296,131,319.12	2,485,487,457.19
Budget	256,826,621.81																										
Forecast	273,397,435.67																										
Total	803,305,814.64																										

Filters

Search

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Visualizations

Fields

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

Values

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

Canvas

Page 1 +

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

Income Expense

53.64bn Amount

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

MonthName November December May July August June October April September March February January

ScenarioName Audio Camera and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video

	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total	Actual	Budget	Forecast	Total							
Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	10,506,702,494.30	3,572,004,626.25	3,347,605,529.68	1,208,041,332.59	13,487,431,779.03	218,933,396.02	4,307,849,337.57	207,049,792.29	645,713,709.26	5,665,988,969.42	5,299,115,246.06	215,317,906.62	675,921,659.33	230,738,587.69	219,730,520.95	229,865,165.02	7,112,453,151.25	2,485,487,457.19	2,330,834,374.94	2,296,131,319.12
Budget																							
Forecast																							
Total																							

Page 1 +

Filters

Select all
2020
2019
2018
2017
2016
2015

Search

Add data fields here

Filters on all pages

Add data fields here

Values

Add data fields here

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

Visualizations

Fields

Search

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

Filters Pane

Visualizations Pane

The screenshot shows the Power BI Desktop interface with the Home tab selected. On the left, there are three visualizations: a large blue bar chart labeled "53.64bn Amount by AccountType" showing Income and Expense, a smaller bar chart "Amount by MonthName and ScenarioName" comparing Actual, Budget, and Forecast values across months, and a table "ScenarioName" showing detailed financial data for various product categories like Audio, Cameras and camcorders, Cell phones, Computers, Games and Toys, Home Appliances, Music, Movies and Audio Books.

The ribbon menu includes File, Home, Insert, Modeling, View, and Help. The Home tab has options for Paste, Cut, Copy, Format painter, Get data (Excel, Power BI datasets, SQL Server), Enter data, Recent sources, Transform Refresh data, New visual, Text box, More visuals, New measure, Quick measure, Publish, and Share.

The Visualizations pane on the right is highlighted with a red box. It contains sections for Filters, Visualizations, Fields, Values, Drill through, Cross-report, and Keep all filters. The Visualizations section lists various visualization icons. The Fields section lists DimAccount, DimDate, DimProductCateg..., DimScenario, and FactStrategyPlan. The Values section has an "Add data fields here" button. The Drill through section has an "Add drill-through fields here" button. The Cross-report section has an "Off" toggle switch. The Keep all filters section has an "On" toggle switch.

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

Income Expense

53.64bn Amount

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

MonthName November December May July August June October April September March February January

ScenarioName Audio Cameras and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and Audio Books

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Page 1 +

Filters

Search

Select all
2020
2019
2018
2017
2016
2015

Filters on this page ...

Add data fields here

Filters on all pages ...

Add data fields here

Visualizations

Fields

Search

DimAccount
DimDate
DimProductCateg...
DimScenario
FactStrategyPlan

Values

Drill through

Cross-report

Off

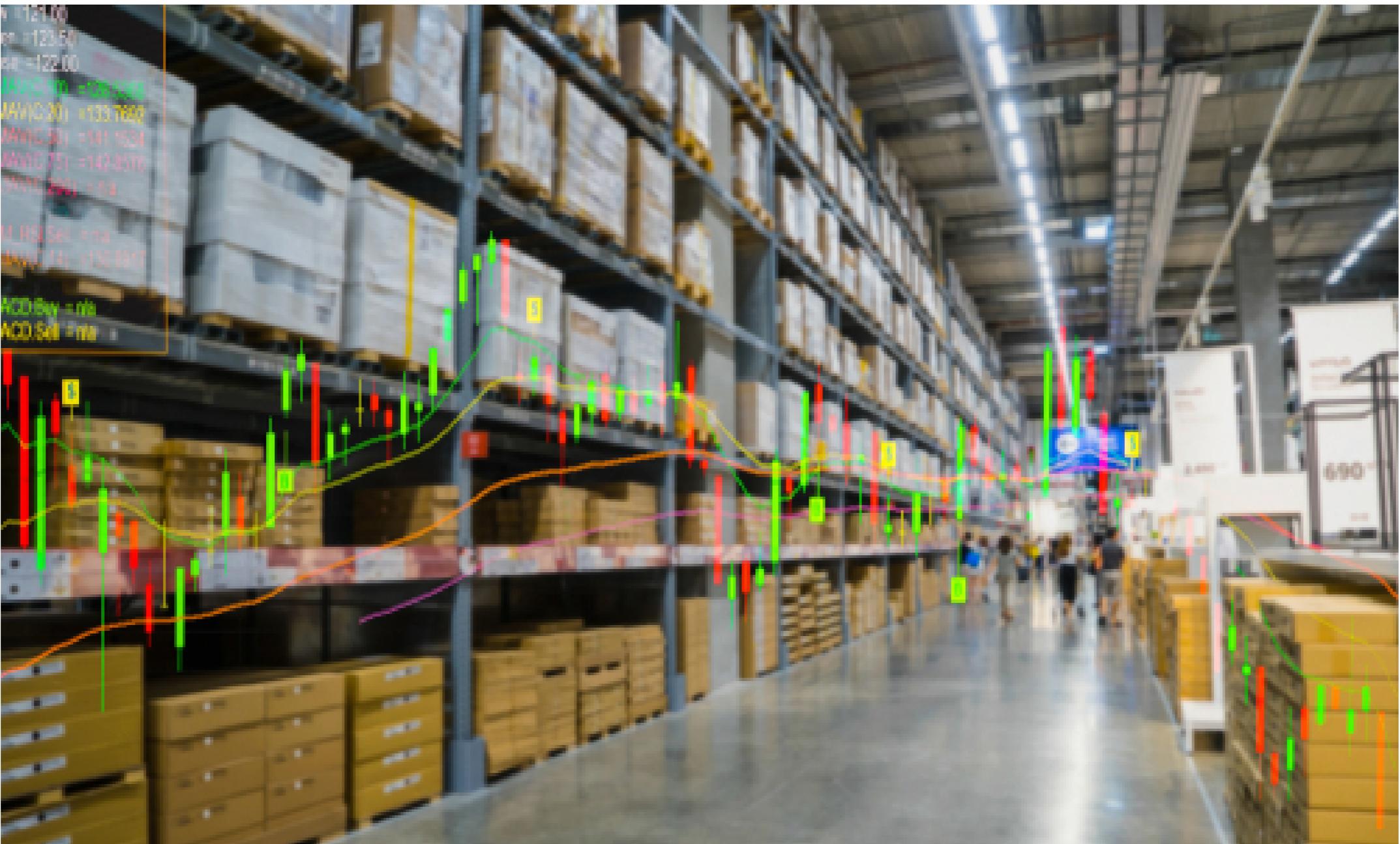
Keep all filters

On

Add drill-through fields here

Fields Pane

Wide World Importers (WWI) dataset



Wide World Importers (WWI) dataset structure

- Snowflake schema
- Fact Table:
 - FactSales.csv
- Dimension Tables:
 - DimCustomer.csv
 - DimEmployee.xlsx
 - DimStockItem.csv
 - DimDate.csv
 - DimCity.csv

Let's practice!

INTRODUCTION TO POWER BI

Getting started!

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Let's practice!

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Slicers and Tables

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Let's practice!

INTRODUCTION TO POWER BI

Transforming data

INTRODUCTION TO POWER BI



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Transforming data

- Dataset may contain:
 - Columns you don't need
 - Inconvenient and inconsistent formatting
 - Extra characters
 - Blank rows
- Cleaning data

Loading data

FactSale.csv

File Origin: 65001: Unicode (UTF-8) Delimiter: Comma Data Type Detection: Based on first 200 rows

Sale Key	City Key	Customer Key	Bill To Customer Key	Stock Item Key	Invoice Date Key	Delivery Date Key	Salesperson Key	W1
49258	71135	0	0	194	10/22/2013	10/23/2013	86	
49265	41568	0	0	204	10/22/2013	10/23/2013	83	
49456	70409	0	0	202	10/22/2013	10/23/2013	74	
49372	48937	0	0	173	10/22/2013	10/23/2013	83	
49624	41981	0	0	168	10/24/2013	10/25/2013	85	
49635	70510	0	0	164	10/24/2013	10/25/2013	84	
49908	66274	0	0	198	10/25/2013	10/26/2013	70	
50034	44106	0	0	180	10/25/2013	10/26/2013	85	
50190	56014	0	0	195	10/26/2013	10/27/2013	74	
50487	79969	0	0	164	10/28/2013	10/29/2013	19	
50367	81342	0	0	180	10/28/2013	10/29/2013	85	
50379	91464	0	0	174	10/28/2013	10/29/2013	70	
50436	38583	0	0	192	10/28/2013	10/29/2013	19	
50715	85575	0	0	190	10/29/2013	10/30/2013	39	
50739	81481	0	0	168	10/29/2013	10/30/2013	83	
50914	75393	0	0	171	10/30/2013	10/31/2013	74	
51426	87371	0	0	163	11/4/2013	11/5/2013	84	
51623	47499	0	0	179	11/5/2013	11/6/2013	19	
51656	84269	0	0	187	11/5/2013	11/6/2013	19	
51680	52627	0	0	184	11/5/2013	11/6/2013	91	

Load Transform Data Cancel

Loading data

FactSale.csv

File Origin: 65001: Unicode (UTF-8) Delimiter: Comma Data Type Detection: Based on first 200 rows

Sale Key	City Key	Customer Key	Bill To Customer Key	Stock Item Key	Invoice Date Key	Delivery Date Key	Salesperson Key	W1
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51623	47499	0	0	179	11/5/2013	11/6/2013	19	
51656	84269	0	0	187	11/5/2013	11/6/2013	19	
51680	52627	0	0	184	11/5/2013	11/6/2013	91	

Load Transform Data Cancel

Loading data

FactSale.csv

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50487	79969	0	0	164	10/28/2013	10/29/2013	19	
50367	81342	0	0	180	10/28/2013	10/29/2013	85	
50379	91464	0	0	174	10/28/2013	10/29/2013	70	
50436	38583	0	0	192	10/28/2013	10/29/2013	19	
50715	85575	0	0	190	10/29/2013	10/30/2013	39	
50739	81481	0	0	168	10/29/2013	10/30/2013	83	
50914	75393	0	0	171	10/30/2013	10/31/2013	74	
51426	87371	0	0	163	11/4/2013	11/5/2013	84	
51623	47499	0	0	179	11/5/2013	11/6/2013	19	
51656	84269	0	0	187	11/5/2013	11/6/2013	19	
51680	52627	0	0	184	11/5/2013	11/6/2013	91	

Load Transform Data Cancel

Power Query Editor

The screenshot shows the Microsoft Power Query Editor interface. The title bar reads "Untitled - Power Query Editor". The ribbon menu includes File, Home, Transform, Add Column, View, Tools, and Help. The Home tab is selected, displaying various icons for managing queries and data sources. The main area shows a table with 21 columns and 999+ rows, with the first few rows visible. The columns are labeled: Sale Key, City Key, Customer Key, Bill To Customer Key, and Stock Item. The "Query Settings" pane on the right shows the query is named "FactSale" and lists the applied steps: "Source", "Promoted Headers", and "Changed Type". The status bar at the bottom indicates "21 COLUMNS, 999+ ROWS" and "Column profiling based on top 1000 rows".

1 ² ₃ Sale Key	1 ² ₃ City Key	1 ² ₃ Customer Key	1 ² ₃ Bill To Customer Key	1 ² ₃ Stock Item
1	49258	71135	0	0
2	49265	41568	0	0
3	49456	70409	0	0
4	49372	48937	0	0
5	49624	41981	0	0
6	49635	70510	0	0
7	49908	66274	0	0
8	50034	44106	0	0
9	50190	56014	0	0
10	50487	79969	0	0
11	50367	81342	0	0
12	50379	91464	0	0
13	50436	38583	0	0
14	50715	85575	0	0
15	50739	81481	0	0
16	50914	75393	0	0
17	51426	87371	0	0
18	51623	47499	0	0
19	51656	84269	0	0
20	51680	52627	0	0
21	51759	55733	0	0
22	51852	48937	0	0

21 COLUMNS, 999+ ROWS Column profiling based on top 1000 rows

PREVIEW DOWNLOADED AT 3:42 PM

Don't forget to Close & Apply

The screenshot shows the Microsoft Power Query Editor interface. The title bar reads "Untitled - Power Query Editor". The ribbon menu is visible with tabs: File, Home, Transform, Add Column, View, and Help. The "Home" tab is currently selected. In the ribbon, the "Close & Apply" button is highlighted with a mouse cursor. A tooltip window appears over the "Close & Apply" button, containing the text: "Close the Query Editor window and apply any pending changes." Below the ribbon, there are several buttons: New, Recent Sources, Enter Data, Data source settings, Manage Parameters, Refresh Preview, Manage, Choose Columns, and Manage. The "Data Sources" and "Parameters" sections are also visible. At the bottom of the screen, a preview pane shows a table with columns: Cost of living, Crime, Culture, and Health. The table has two rows, with the second row being edited. The preview pane also displays some M code: `= Table.TransformColumnTypes(#"Changed Type", {{"Cost of living", Int64}, {"Crime", Int64}, {"Culture", Int64}, {"Health", Int64}})`. On the left side, there is a navigation pane with items: "Ranking of best and wor...", "States of the United Stat...", and "A C Health".

Let's practice!

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Power Query Editor

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Transforming and formatting columns

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