

Power BI For Beginners



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What is Power BI?

Power BI is a business intelligence tool that allows you to effectively report insights through easy to use customizable visualizations and dashboards.

Why use power BI?

- ★ **Easy to use no coding involved**
- ★ **Integrates seamlessly with any data source**
- ★ **Fast and can handle large datasets.**



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Power BI components:

There are three components to Power BI each of them serving different purposes.

Power BI Desktop:

Free desktop application that provides data analysis and creation tools.

Power BI service:

Cloud based version of Power BI with report editing and publishing features.

Power BI mobile:

A mobile app of Power BI, which allows you to author, view, and share reports on the go.



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Getting started with power BI:

There are three main views in Power BI.

Report view:

This view is the default view, where you can visualize data and create reports.

Data view:

This view lets you examine datasets associated with your reports.

Model view:

This view helps you establish different relationships between datasets.



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Visualizing your first dataset:

(A). Upload datasets into Power BI:

- ✓ Underneath the Home tab, click on Get Data.
- ✓ Choose any of your datasets and double click .
- ✓ Click on Load if not prior data needs processing .
- ✓ If you need to transform the data, click Transform which will launch Power Query. Keep reading this cheat sheet for how to apply transformations in Power Query.
- ✓ Inspect your data by clicking on the Data View.



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Create relationship in power BI:

- ✓ If you have different datasets you want to connect. First, upload them into Power BI.
- ✓ Click on the Model View from the left-hand pane.
- ✓ Connect key columns from different datasets by dragging one to another (e.g., EmployeeID to e.g., SalespersonID)



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Create your first visualization:

- ✓ Click on the Report View and go to the Visualizations pane on the right hand side.
- ✓ Select the type of visualization you would like to plot your data on. Keep reading this cheat to learn different visualizations available in Power BI.
- ✓ Under the Field pane on the right hand side, drag the variables of your choice into Values or Axis.

Values let you visualize aggregate measures (e.g. Total Revenue)

Axis let you visualize categories (e.g. Sales Person)



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Aggregating data:

- Power BI sums numerical fields when visualizing them under Values. However, you can choose different aggregations.

- ✓ Select the visualization you just created.
- ✓ Go to the Visualizations section on the right - hand side.
- ✓ Go to Values the visualized column should be there.
- ✓ On the selected column click on the dropdown arrow ▼ and change the aggregation (i.e., AVERAGE, MAX, COUNT, etc..)



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