

Power BI Desktop Introduction

Two days to professional-grade BI reports and dashboards.

◆ THIS CLASS AT A GLANCE

Excel can take you a long way — but at some point, your reports outgrow it. Power BI is where serious data work lives. In two intensive days you will go from no Power BI experience to publishing your own interactive dashboards.

- Connect to data sources and reshape with Power Query
- Build a relational data model with star and snowflake schemas
- Write DAX measures, calculated columns and time intelligence
- Create interactive dashboards with drill-down and bookmarks
- Use built-in AI: Decomposition Tree, Key Influencers, Smart Narratives
- Optimize performance with the Optimize Ribbon and Performance Analyzer

Power BI Desktop Introduction

C O U R S E O V E R V I E W

Power BI is Microsoft's industry-leading business intelligence platform. It is the tool serious analysts and report developers use to build the dashboards executives rely on.

This class covers the complete end-to-end BI workflow: connect, transform, model, calculate, visualize. By the end of day two you will have built a full Power BI report from scratch and published it.

HOW WE TEACH

Your instructor is a working professional, not a presenter reading from slides.

Public classes have up to 6 students for maximum individual attention. Private team training scales to fit your group, however large.

Every concept is taught, then immediately practiced. You leave with the muscle memory, not just the notes.

WHO SHOULD ATTEND

Individuals who want to learn Power BI Desktop from the ground up — no prior experience required.

Team members who want to become report and dashboard creators.

Excel power users ready to move beyond Excel's reporting limits.

Anyone who needs to deliver professional-grade BI to a leadership audience.

WHAT YOU TAKE HOME

- Printed class binder with step-by-step labs and challenge exercises.
- Microsoft Power BI exercise files — 1-year access included.
- Certificate of completion plus 16 CPE credits (TSBPA accredited).

C L A S S E S S E N T I A L S

Level: Advanced

Format: In-person classroom or live online (always a live instructor)

Duration: 2 days — 9:15 AM to 5:00 PM each day

Tuition: \$1,190 · includes all materials

Locations: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver · Live Online

Credits: 16 CPE credits — accredited through the Texas State Board of Public Accountancy

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PROGRAM AGENDA — DETAILED COURSE OUTLINE

PROGRAM AGENDA

1. Power BI Overview

- **Power BI Desktop:** the report-authoring application
- **Power BI Service:** the cloud platform for sharing and collaboration
- **Power BI Mobile & Report Server:** viewing and on-premises options
- **Power Query overview:** the engine behind data shaping

2. Connecting & Shaping Data

- **Data connectors:** files, databases, web pages and more
- **Storage & import modes:** Import vs. DirectQuery
- **Table transformations:** cleaning and reshaping data
- **Database & web connections:** pulling from external sources
- **Profiling tools:** checking data quality before you model
- **Text, numeric, date & time tools:** the most-used transformations
- **Index & conditional columns:** row numbers and IF logic
- **Grouping, aggregating, pivoting:** rolling up and reshaping
- **Merging & appending:** joining and stacking queries
- **Parameters & Excel imports:** reusable inputs and migration

3. Relational Data Model

- **Normalization:** designing tables that scale
- **Fact & dimension tables:** the foundation of analytics
- **Keys & relationships:** primary, foreign, and how to connect them
- **Star & snowflake schemas:** the two most common shapes
- **Relationship cardinality:** 1-to-1, 1-to-many, many-to-many
- **Filter context & flow:** how filters travel through the model
- **Bi-directional filters:** when to use them and when not to
- **Hierarchies & data categories:** drill-down structures and geo data

4. DAX Calculated Fields

- **DAX vs. M:** two languages, two purposes
- **Calculated columns & measures:** what each one is for
- **Implicit, explicit & Quick Measures:** three ways to write DAX
- **DAX syntax & operators:** the foundation
- **Math, stats, logical, text, date functions:** the core toolkit
- **RELATED, CALCULATE, FILTER, ALL:** the most important DAX functions
- **Iterator (X) functions:** row-by-row calculations
- **Time intelligence:** YTD, prior period, moving averages

5. Visualizing Data

- **Data viz best practices:** what makes a chart effective
- **Dashboard design framework:** how to lay out a report
- **Cards, KPIs, line charts, trends:** the building blocks
- **Tables, matrices, conditional formatting:** tabular reporting
- **Top N filtering & map visuals:** ranking and geographic analysis
- **Drill-down & drill-through:** interactive exploration
- **Slicers, bookmarks, page navigation:** report interactivity
- **Custom tooltips & visuals:** extending the standard library
- **Mobile layouts:** designing for phones
- **Publishing to Power BI Service:** sharing your work
- **Row-Level Security (RLS):** controlling who sees what

6. AI Tools & Optimization

- **Decomposition trees:** drill into any measure interactively
- **Key Influencers:** automated driver analysis
- **Smart Narratives:** AI-generated written summaries
- **Natural-language Q&A:** ask questions of your data
- **Performance Analyzer:** find slow visuals and queries
- **Optimize Ribbon & presets:** tuning report performance



A L T E R T O Y O U R M A N A G E R

Use this template to request approval. Customize the bracketed parts and send.

Dear [Manager's Name],

I would like to request approval to attend the Power BI Desktop Introduction class offered by Excel Experts. It is a two-day, hands-on intensive that will give me the skill set to deliver professional-grade BI reports — exactly what we need for [team / project / report name].

What I'll bring back to the team

- **Professional BI reports** — the kind of dashboards leadership expects, built by me.
- **A proper data model** — star schemas and relationships that scale beyond Excel.
- **DAX** — the formula language that powers Power BI's most advanced calculations.
- **Time intelligence** — YTD, prior period, rolling averages, all on tap.
- **AI-powered analysis** — Decomposition Trees, Key Influencers, and natural-language Q&A.

Why this class specifically

- **Two full days** — a complete end-to-end intensive, not a multi-week drip.
- **Taught by a working BI professional** — not a recorded video or a generic presenter.
- **Small public classes (up to 6 students)** — or live online if travel is a concern; private team training is also available.
- **16 CPE credits included** — accredited through the Texas State Board of Public Accountancy.
- **Locally available** — Dallas-Fort Worth, Houston, Austin, Oklahoma City, Denver, or live online.

The investment

- **Tuition:** \$1,190
- **Time out of office:** 2 business days
- **Included materials:** printed class binder, Power BI exercise files (1-year access), certificate of completion

I expect to deliver value within the first few weeks by replacing manual Excel reports with refreshable Power BI dashboards — and I will be able to share what I learn with the rest of the team.

Class details and online registration: dfwexcel.com/power-bi-desktop-introduction-class/

Questions: 817-841-9560

Thank you for considering this. I would appreciate your approval to enroll.

Sincerely,

[Your Name]

REGISTRATION

Enroll Today!

Online: dfwexcel.com

Phone: 817-841-9560

Price: \$1,190

Format: In-person classroom or live online

Cities: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver

TRAIN YOUR TEAM

Bring Excel Experts to your office:

- Private group training on your schedule
- Tailored to your team's industry and data
- On-site, at our classrooms, or virtual
- 1-on-1 coaching also available

dfwexcel.com/excel-experts-train-your-team/