

Modern Analyst and Business Intelligence with Excel, Power BI, MS Teams, and SharePoint

Course Description: In this course, you will learn how to modernize and empower data conversations within your organization using Excel & Power BI together with MS Teams, and SharePoint. You'll gain awareness of the business intelligence landscape, technology capabilities, and their roles.

Prerequisites: Familiarity with Microsoft Excel, Office 365 and Excel 2016+, PivotTables, Microsoft Teams and SharePoint.

Duration: 2 days (16 hours)

Course Outline

Day 1

Module 1: Introduction to modern analytics using Excel and Power BI

Learn how Microsoft Office 365/Microsoft Excel 2016+, combined with Microsoft Power Query, Data Model, Power BI Desktop, and Power BI service come together to provide Microsoft modern analytics capabilities.

- Introduction
- Benefits of modern analytics
- Ecosystem of modern analytics
- Roles of modern analytics
- Install and update modern analytics applications

Module 2: Automate data cleaning with Power Query

Power Query in Microsoft Excel is a powerful data connection, cleaning, and shaping technology that is a core part of the Microsoft modern analytics suite of business intelligence tools. Achieving clean data for analysis consumes countless hours for professionals across all industries. With Power Query, your data preparation and cleaning will be transformed, automated, and improved, giving you time for analysis and for driving business impact.

- Introduction
- Explore the Power Query user interface
- Import data
- Common data challenges and Power Query transformations
- Lab 01 - Use Power Query in Excel

Module 3: Introduction to foundations in data modeling

This module introduces data modeling concepts and the recommended best practices for creating a data model. You will learn about data model relationships, table types, measures, and calculated columns.

- Introduction

- *Data model relationships*
- *Data model table types*
- *Data model measures*
- *Data model calculated columns*
- *Data model benefits*

Module 4: Transition from Excel to Power BI

Power BI Desktop is a Microsoft application encompassing Power Query and DAX data model technologies from Excel with the cloud Power BI service and many other features.

- Excel to Power BI introduction
- Power Query in Power BI Desktop
- Data modeling in Power BI Desktop
- Exercise - Import to Power BI Desktop

Day 2

Module 5: Design interactive data experiences with Power BI Desktop

Power BI enables report authors to produce interactive reports using visuals, slicers, bookmarks, and more.

- Introduction
- Use Power BI
- Use Power BI to build a data model

Module 6: Secure, publish, and share data in Power BI

Secure, share, publish, and keep data up to date using workspaces in the Power BI service, empowering teams to discover limitless data insights.

- Share and use reports in Power BI
- Row-level security
- Publish a report to a Power BI workspace
- Share reports and user experience
- Protect data in Power BI
- Data refresh and alerts

Module 7: Transcend data analysis together with Power BI and Excel

This module explains the different ways that Microsoft Excel users can interact with Microsoft Power BI datasets to analyze data.

- Enable compatibility with Excel
- Connect Excel to Power BI datasets
- Dataset types and security
- Convert PivotTables to formulas
- Office 365/Excel 2016+ formulas
- Featured tables and lineage
- Excel and Power BI are better together
- Exercise - Creating an Excel report using a Power BI Dataset

- Exercise - Excel and Power BI service better together

Module 8: Integrate Power BI in Microsoft Teams and SharePoint

This module goes into the different ways users can incorporate Power BI reports or visuals into Microsoft Teams and SharePoint to collaborate with others.

- *Introduction*
- *Power BI together with Microsoft Teams*
- *Power BI together with SharePoint Online*