Getting Started: Power BI Essentials

Power BI Desktop and Service

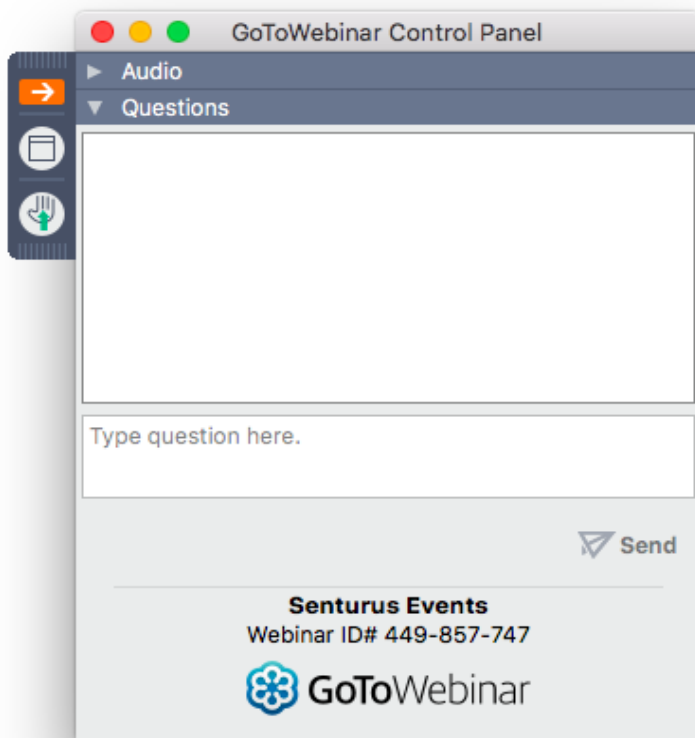# GoToWebinar Control Panel

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TOPICS

+ ☐ DASHBOARDS, REPORTING & VISUALIZATIONS (0)

☐ DATA ARCHITECTURE (9)

☐ DATA PREPARATION (10)

+ ☐ ENTERPRISE PLANNING (0)

+ ☐ PREDICTIVE ANALYTICS (2)

☐ SALESFORCE REPORTING (6)

NEED IN-DEPTH TRAINING?

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Agenda

- Introduction

- Power BI Desktop

- Power BI Service

- Summary

- Senturus overview

- Additional resources

- Q & A

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Introducing...Today's Presenters

Bill Pearson

Microsoft Business
Intelligence Architect

Senturus, Inc.

Michael Weinhauer

Practice Area Director/
Solutions Architect

Senturus, Inc.

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POWER BI DESKTOP

Introduction: Power BI Desktop

- Ideal design environment for Power BI
  - Data models
  - Prototyping / proof-of-concept

- Specifically designed for data analytics

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Power BI Desktop Self-Service Use Case

I'm an analyst who has data in flat files upon which I want to perform some analysis – and I don't want to get IT involved in what is an exploration effort.


| Prepare | Store | Model | Visualize | Share |
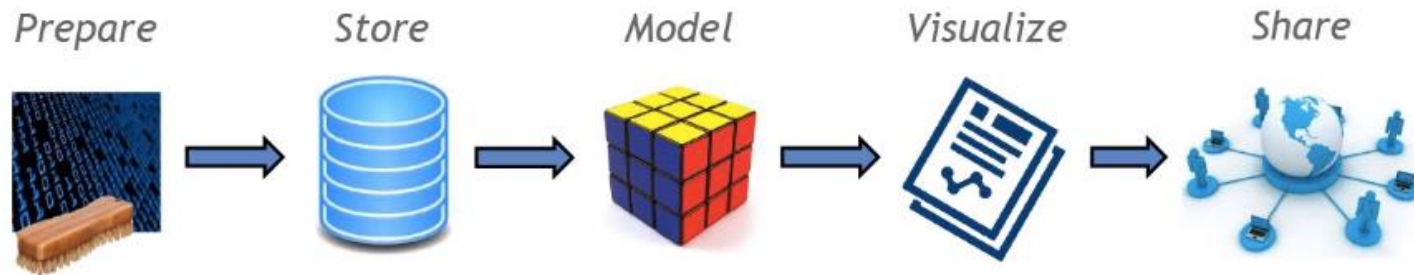
Power BI Desktop Walkthrough

- Two data files (Excel spreadsheet and a CSV file)

- Make data connections to my files

- Import data

- Inspect relationships

- Build a few visualizations

- Learn about Power BI Desktop features

- Publish Power BI model to Power BI Service

- Discuss how to download the free Power BI Desktop

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Let's Take a Look …

Demo / Walkthrough
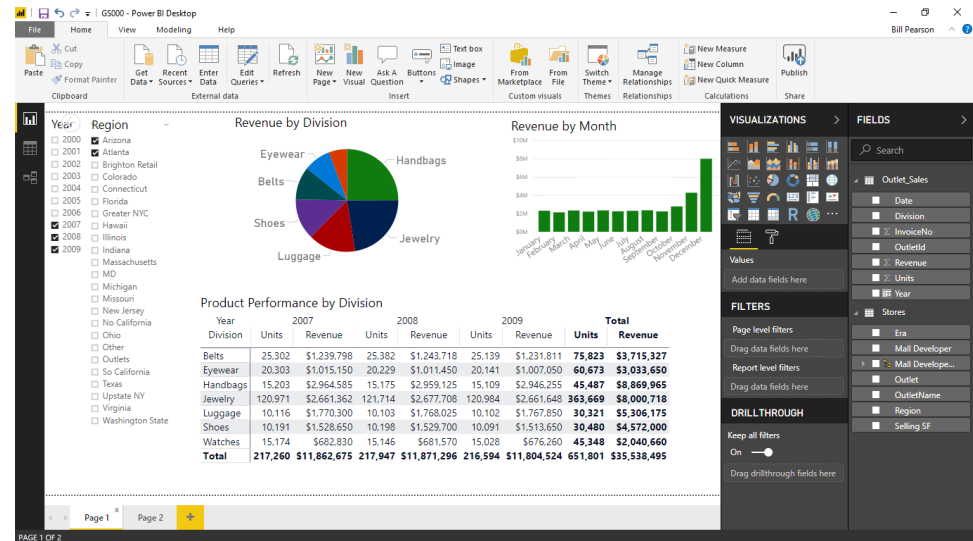
As a Design / Development Environment

Main design steps

- Connect to data
- Transform data
- Refine data model
- Create relationships
- Create visualizations

Visualizations and fields panes

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Making Data Connections

Three options
- Import data
- Direct query
  - Native query direct to data source
  - No data imported / cached
- Live connection (SSAS only)
  - Power BI connects directly to SSAS, generates DAX
  - Power BI becomes presentation layer for SSAS

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Options for Creating Data Models

Two options for creating self-serve data models
- Excel PowerPivot
  - Can deploy to Power BI Service or SharePoint
  - Microsoft Office will lag Power BI Desktop
- Power BI Desktop
  - Combines all Excel Power BI
  - Standalone, free tool
  - Monthly updates with significant advances
  - Can publish only to Power BI Service, Power BI Premium Server and SharePoint 2019

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How to Install Power BI Desktop

Free download

- https://powerbi.microsoft.com/en-us/desktop/
- Downloads menu in Power BI Service

Go from data to insight to action with Power BI Desktop

Create rich, interactive reports with visual analytics at your fingertips—for free.

DOWNLOAD FREE ›

ADVANCED DOWNLOAD OPTIONS ›

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Power BI Service

Introduction: Power BI Service

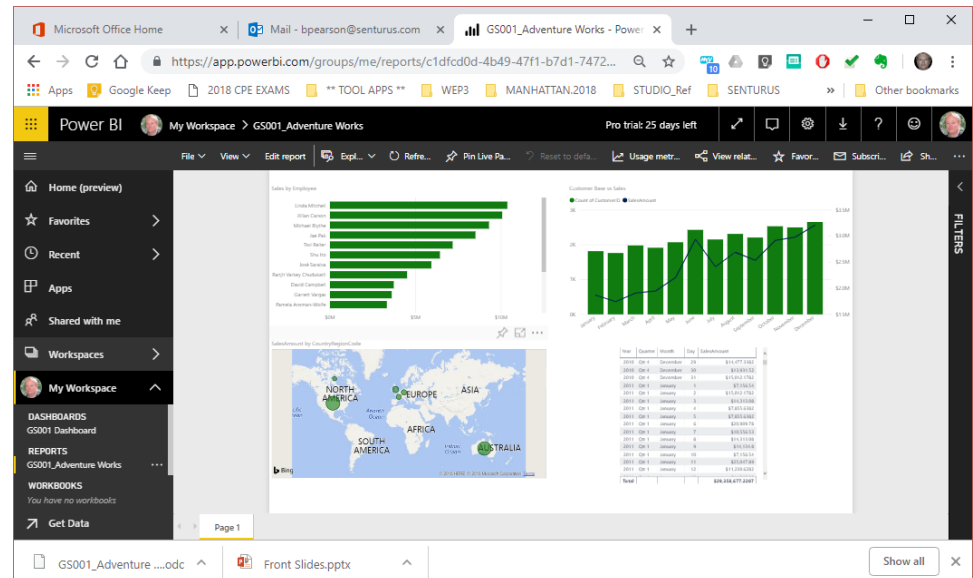Azure-based, business analytics service used for PowerBI.com features, including

- Connections to online services / sources
- Publishing / refreshing data models
- Viewing dashboards and reports online
- Using Q & A (natural language search)
- Sharing / collaborating
- Analyze with Excel

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Power BI Service Walkthrough

- Inspect published models and explore features

- Navigate among datasets, reports and dashboards

- Explain how to assemble dashboards

- Q & A

- Discuss how to sign up for the Power BI Service

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Let's Take a Look …

Demo / Walkthrough

Signing Up for Power BI Service

https://powerbi.microsoft.com/en-us/landing/signin/

It's free!
Sign up for free or become a Pro User for even more storage and BI tools.
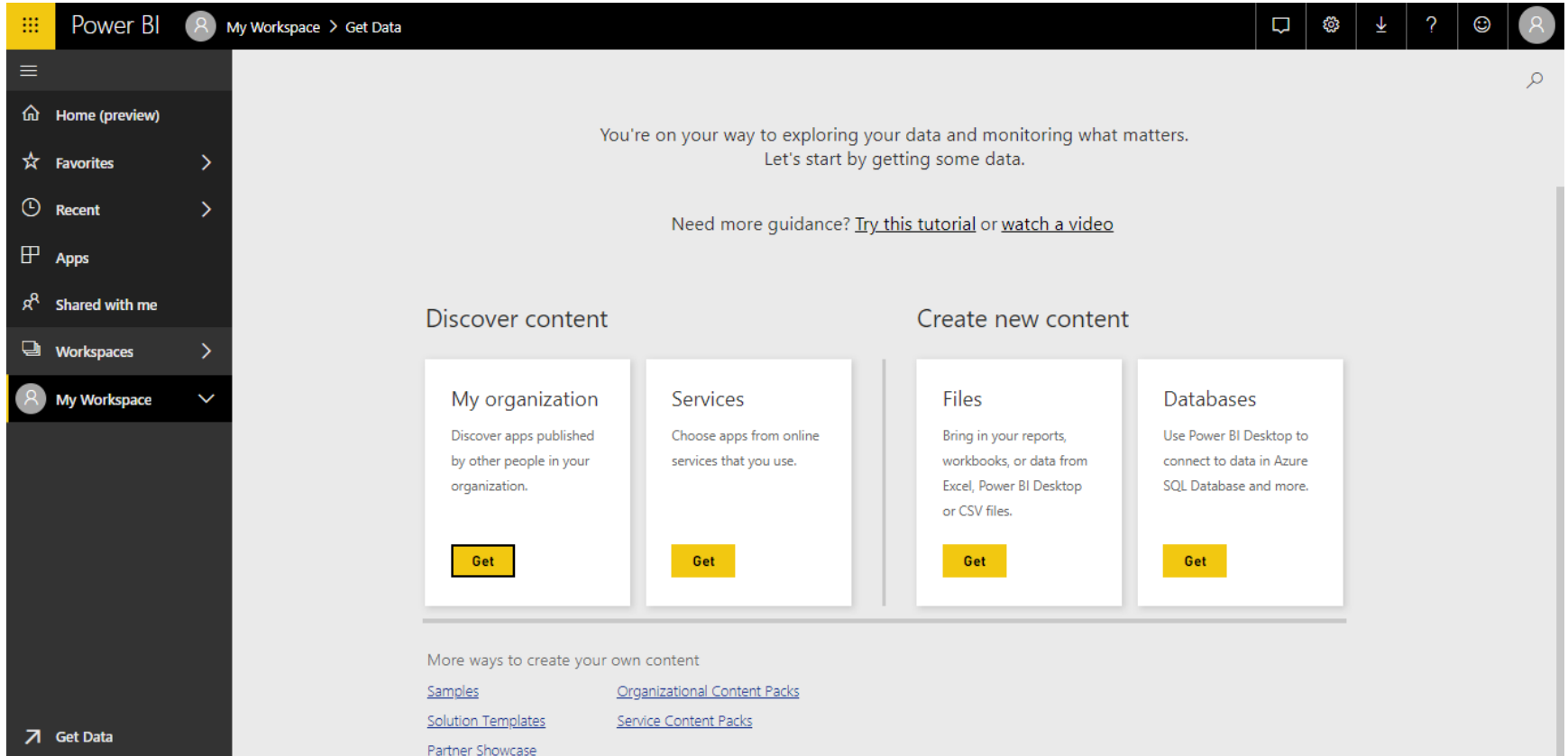
Ready to get started?

wep3@data-architect.com ✕   **Use it free**

By clicking Use it free, you agree to the Power BI Terms of Service.

- Sign up with a domain e-mail address – not "common" e-mail address

- Note organization constraints

- Start with free account – will prompt for Pro account upon attempt to use Pro features (60-day free trial)

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Signing In to Power BI Service

www./powerbi.com

Understanding Power BI Service

- Welcome to Power BI page

- Power BI portal

- Power BI components
  - Datasets
  - Reports
  - Dashboards

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Power BI Portal: Navigation Pane

- Organizes deployed content
- By default, all content deployed to My Workspace
- Pro subscription can
  - Create other workspaces for collaboration
  - Select which workspace to deploy content

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Power BI Components

- Data sources, workbooks and datasets

- Reports

- Dashboards

The elements depend upon each other

$$\text{Datasets} \rightarrow \text{Reports} \rightarrow \text{Dashboards}$$
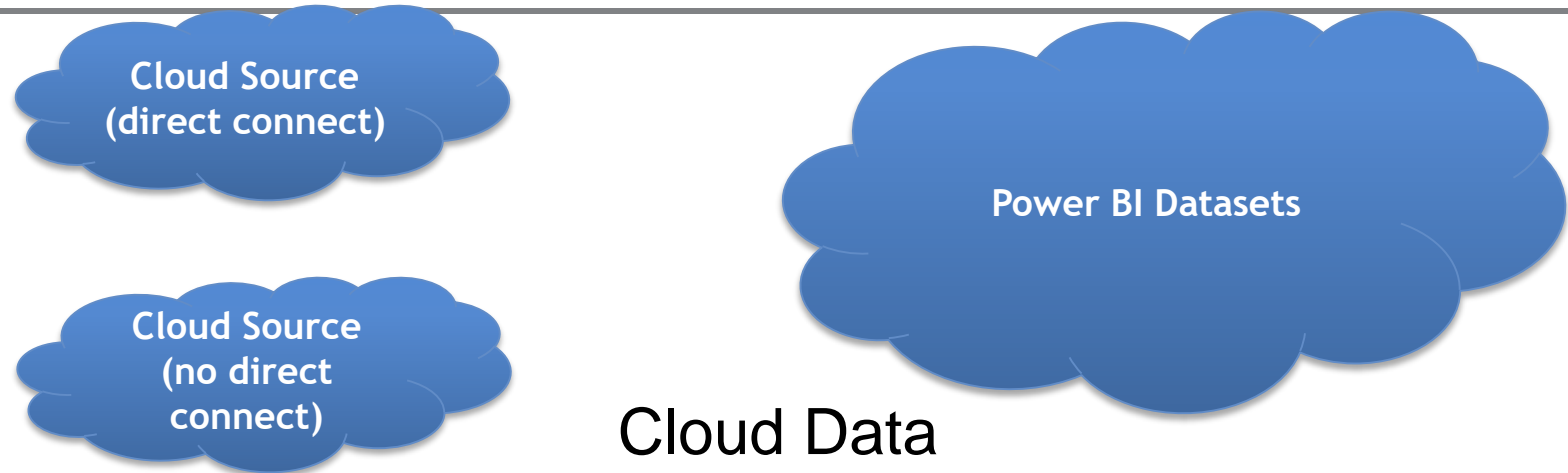
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Power BI Components: Data Sources and Datasets

Datasets can have multiple tables / other sources
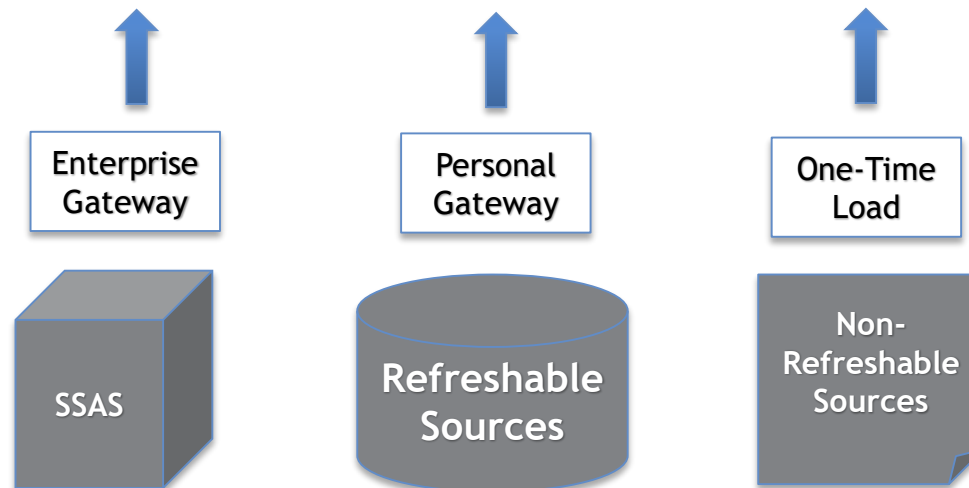
Two primary types of data sources
- Cloud services (SaaS)
- On-premises data sources

- Data can either be
  - Imported into a Power BI dataset
  - Left in original source accessed directly via a live connection

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Power BI Components: Data Sources and Datasets

Cloud Source (direct connect)

Cloud Source (no direct connect)

Power BI Datasets

Cloud Data

On-premises Data

| Enterprise Gateway | Personal Gateway | One-Time Load |

SSAS

Refreshable Sources

Non-Refreshable Sources

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Power BI Components: Reports

- Primary way to analyze data in Power BI
- Reading view vs. editing view
- Creating reports
  - From scratch
  - Importing from
    - Excel (Power view only – not pivot tables)
    - Power BI Desktop
  - Apps / organizational content packs – reports automatically distributed / access controlled

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Power BI Components: Reports (continued)

- One dataset per report, currently
- Approaches to multi-source reporting
  - Dashboard
  - Self-serve model
  - Connect to organizational model in SSAS Tabular
    - Simply connect to model
    - Nothing to build or import with dynamic connection

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Power BI Components: Dashboards

A summarized view of metrics with drill through to underlying detailed reports

Creating dashboards
- From existing reports ("pinning")
- Using Q & A to create / pin report

Distributing dashboards
- Via mail
- Via app workspaces

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Power BI Components: Dashboards (continued)

Drilling into dashboard tiles

- If created by pinning a visualization, navigates user to corresponding report

- If created by Q & A, navigates user to page containing natural question with its visualization

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Signing Up for Power BI Service

https://powerbi.microsoft.com/en-us/landing/signin/

- Sign up with a domain e-mail address – not "common" e-mail address
- Note organization constraints
- Start with free account – will prompt for Pro account upon attempt to use Pro features (60-day free trial)

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Summary

Overview

Getting Started: Power BI Desktop

Getting Started: Power BI Service

Summary

Free Consultation

Talk to one of our business analytics experts for one hour to answer your questions about

- Data prep

- Data modeling

- Creating compelling visualizations

- Infrastructure / best way to deploy

No obligation

Contact info@senturus.com

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WHO WE ARE

Business Analytics Consultants

Bridging the Gap Between Data & Decision Making

Business Needs → SENTURUS → **Analysis Ready Data** → **DECISIONS & ACTIONS**

Business Analytics Architects

- Dashboards, Reporting & Visualizations

- Data Preparation & Modern Data Warehousing

- Self-Service Business Analytics

- Salesforce Reporting

- Big Data & Advanced Analytics

- Planning & Forecasting Systems

- Proprietary Analytics Connector Software

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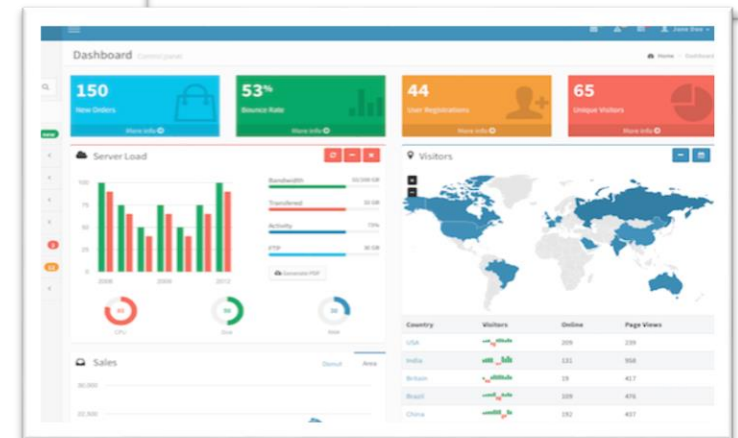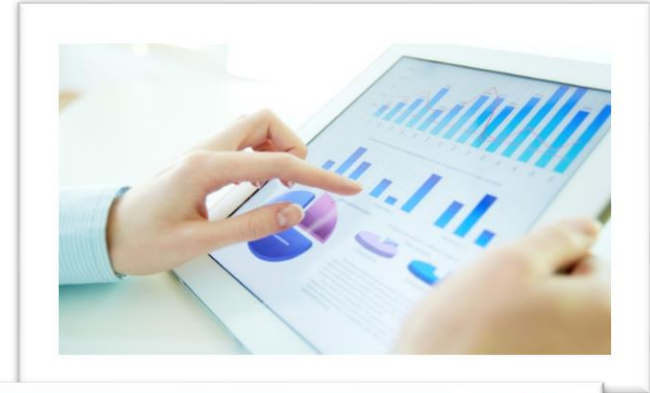
1200+ Clients, 2000+ Projects, 18+ Years

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Upcoming Events

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TIPS FOR INSTALLING COGNOS ANALYTICS 11.1.1

NEW VERSION, NEW STEPS, NEW INSTALLATION TOOL

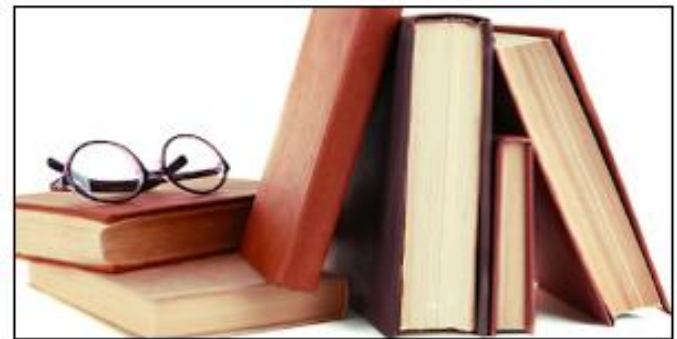Thursday, December 13 - 11am PT (2pm ET) - 60 minutes

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BLOG

A great place to find out what's top of mind at Senturus.
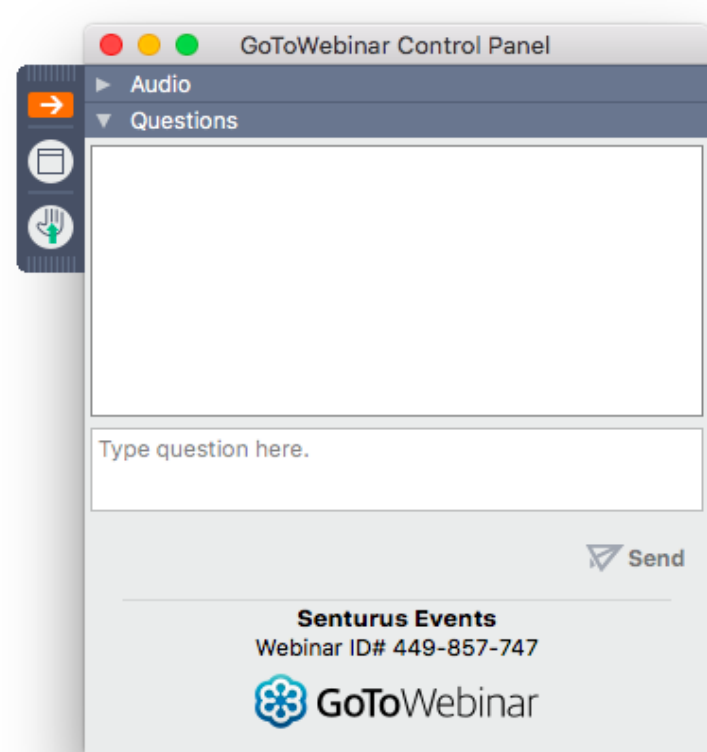
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Q&A

If your question or issue is broader than what can be answered today, contact us at

info@senturus.com

and we will set up a free consultation.

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Thank You!

www.senturus.com
info@senturus.com
888 601 6010