



SENTURUS

GETTING STARTED: POWER BI ESSENTIALS

Power BI Desktop and Service

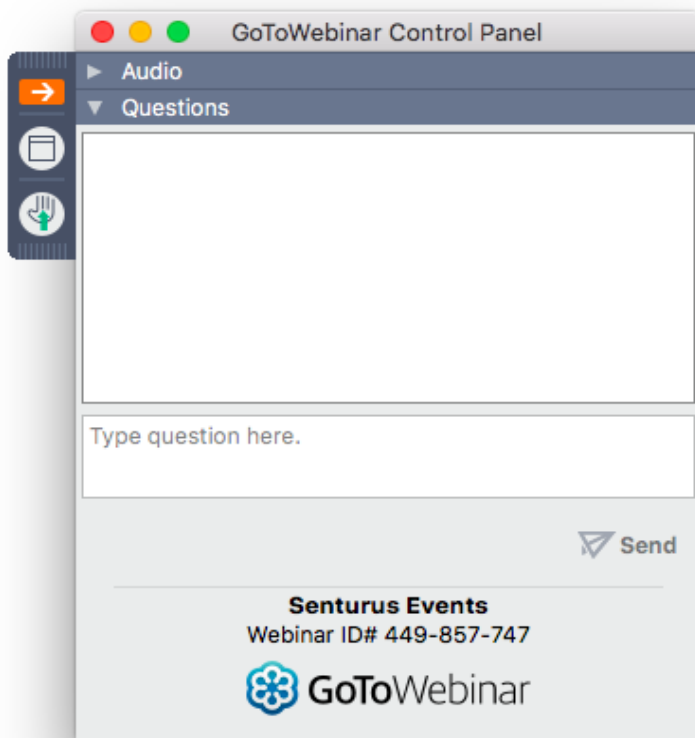


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Presentation Slide Deck

www.senturus.com/resources/

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LEGENDS

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NEW

TOPICS

- + ☐ DASHBOARDS, REPORTING & VISUALIZATIONS (0)
- ☐ DATA ARCHITECTURE (9)
- ☐ DATA PREPARATION (10)
- + ☐ ENTERPRISE PLANNING (0)
- + ☐ PREDICTIVE ANALYTICS (2)
- ☐ SALESFORCE REPORTING (6)

NEED IN-DEPTH TRAINING?

Agenda

- Introduction
- Power BI Desktop
- Power BI Service
- Summary
- Senturus overview
- Additional resources
- Q & A

Introducing...Today's Presenters



Bill Pearson
Microsoft Business
Intelligence Architect
Senturus, Inc.



Michael Weinbauer
Practice Area Director/
Solutions Architect
Senturus, Inc.



POWER BI DESKTOP

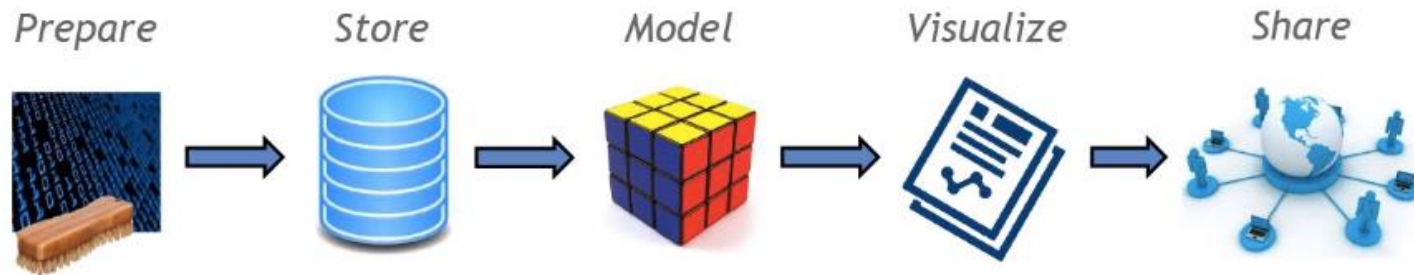


Introduction: Power BI Desktop

- Ideal design environment for Power BI
 - Data models
 - Prototyping / proof-of-concept
- Specifically designed for data analytics

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.

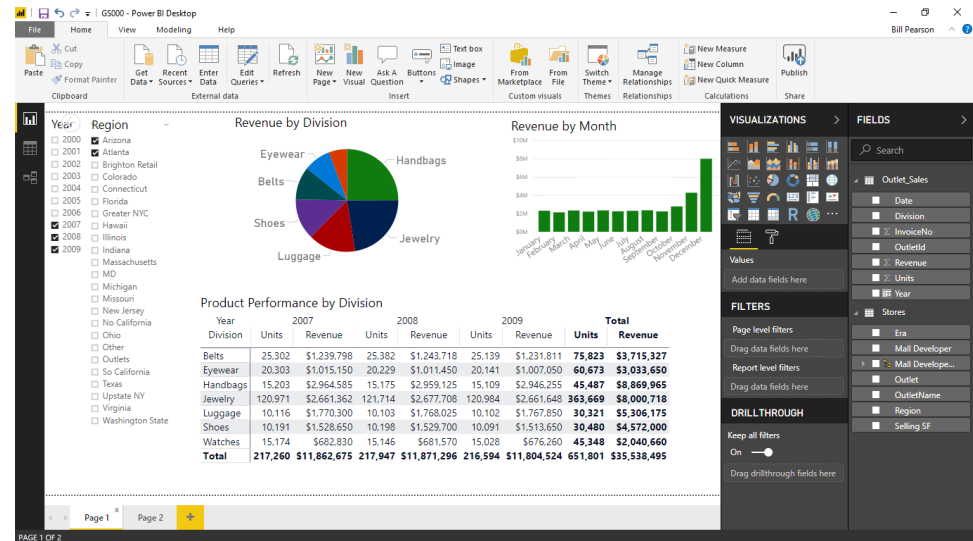


Power BI Desktop Walkthrough

- 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

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

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

Options for Creating Data Models

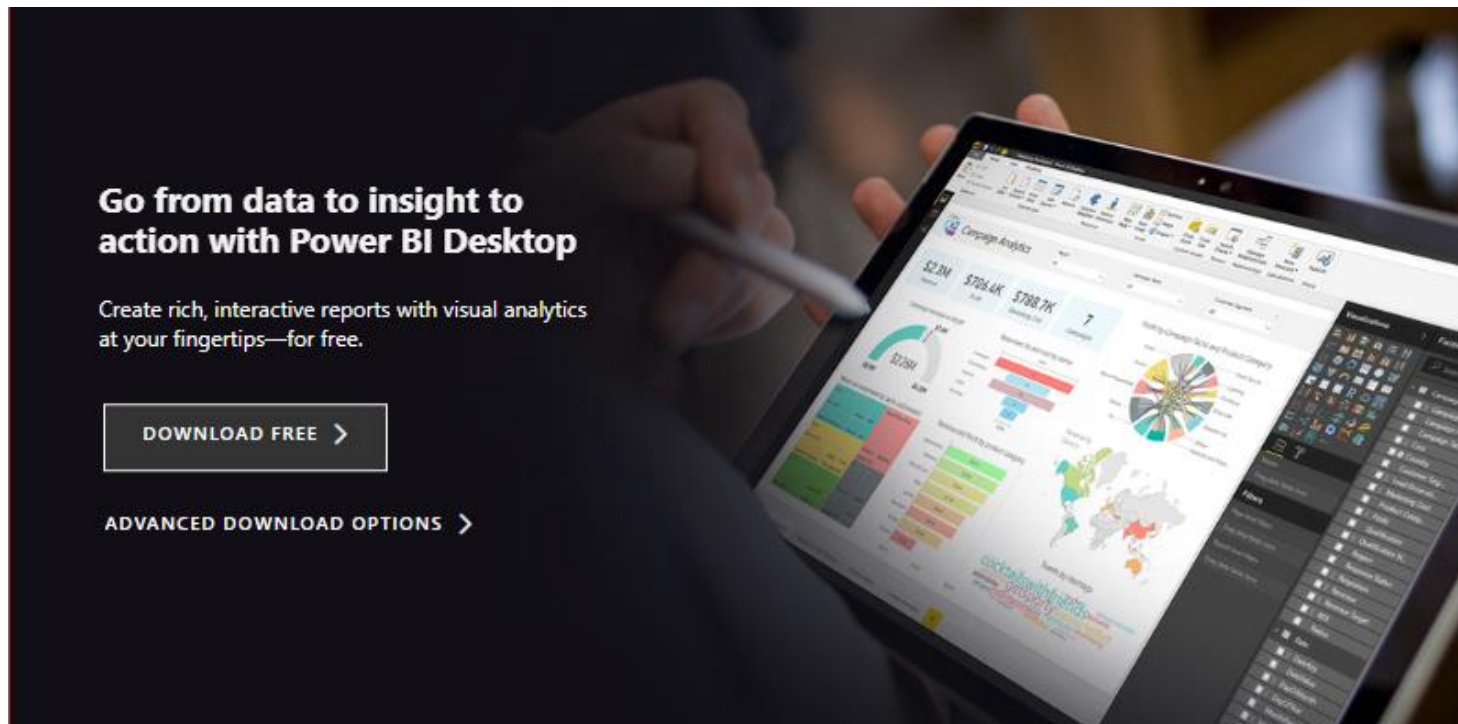
Two options for creating self-serve data models

- 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

How to Install Power BI Desktop

Free download

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





POWER BI SERVICE

A screenshot of the Microsoft Power BI Service landing page. The page has a yellow background. At the top, there is a navigation bar with the Microsoft logo, "Power BI", and links for "Products", "Solutions", "Partners", "Learning", and a "Sign in" button. The main content area features a large heading "Bring your data to life with Microsoft Power BI" with a small icon of a person. Below the heading is a paragraph of text: "Microsoft Power BI transforms your company's data into rich visuals for you to collect and organize so you can focus on what matters to you. Stay in the know, spot trends as they happen, and push your business further." A "Get started free" button is located below the text. On the right side, there is a laptop displaying a dashboard with various charts and graphs.

Introduction: Power BI Service

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

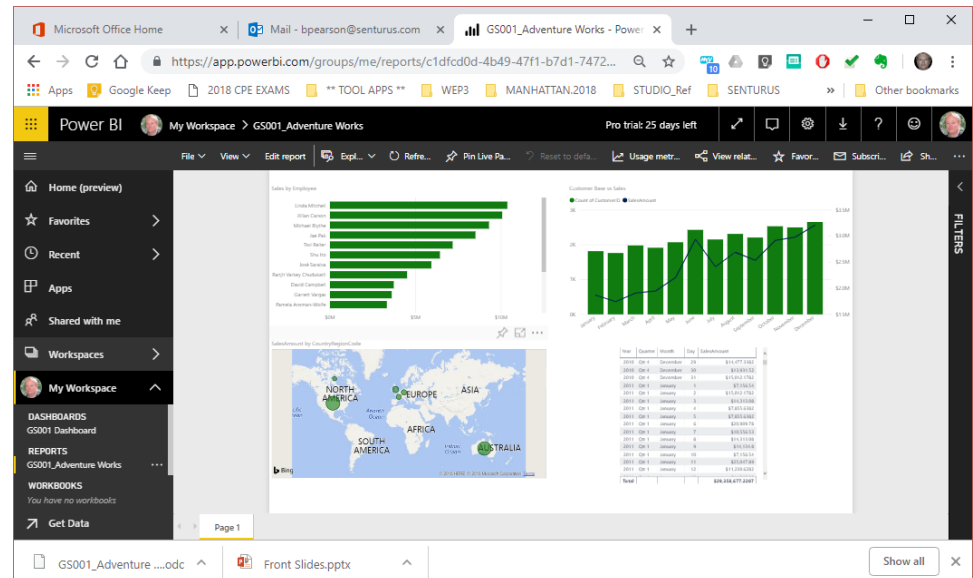
- Connections to online services / sources
- Publishing / refreshing data models
- Viewing dashboards and reports online
- Using Q & A (natural language search)
- Sharing / collaborating
- Analyze with Excel

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

Let's Take a Look ...

Demo / Walkthrough



Signing Up for Power BI Service

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

A dark-themed banner for Power BI Service sign-up. On the left, the text "It's free!" is in large yellow font, followed by "Sign up for free or become a Pro User for even more storage and BI tools." in white. On the right, under the heading "Ready to get started?", there is a white input field containing "wep3@data-architect.com" and a yellow "Use it free" button. Below the button, small white text reads "By clicking Use it free, you agree to the [Power BI Terms of Service](#)." data-bbox="60 290 962 474"/>

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 X

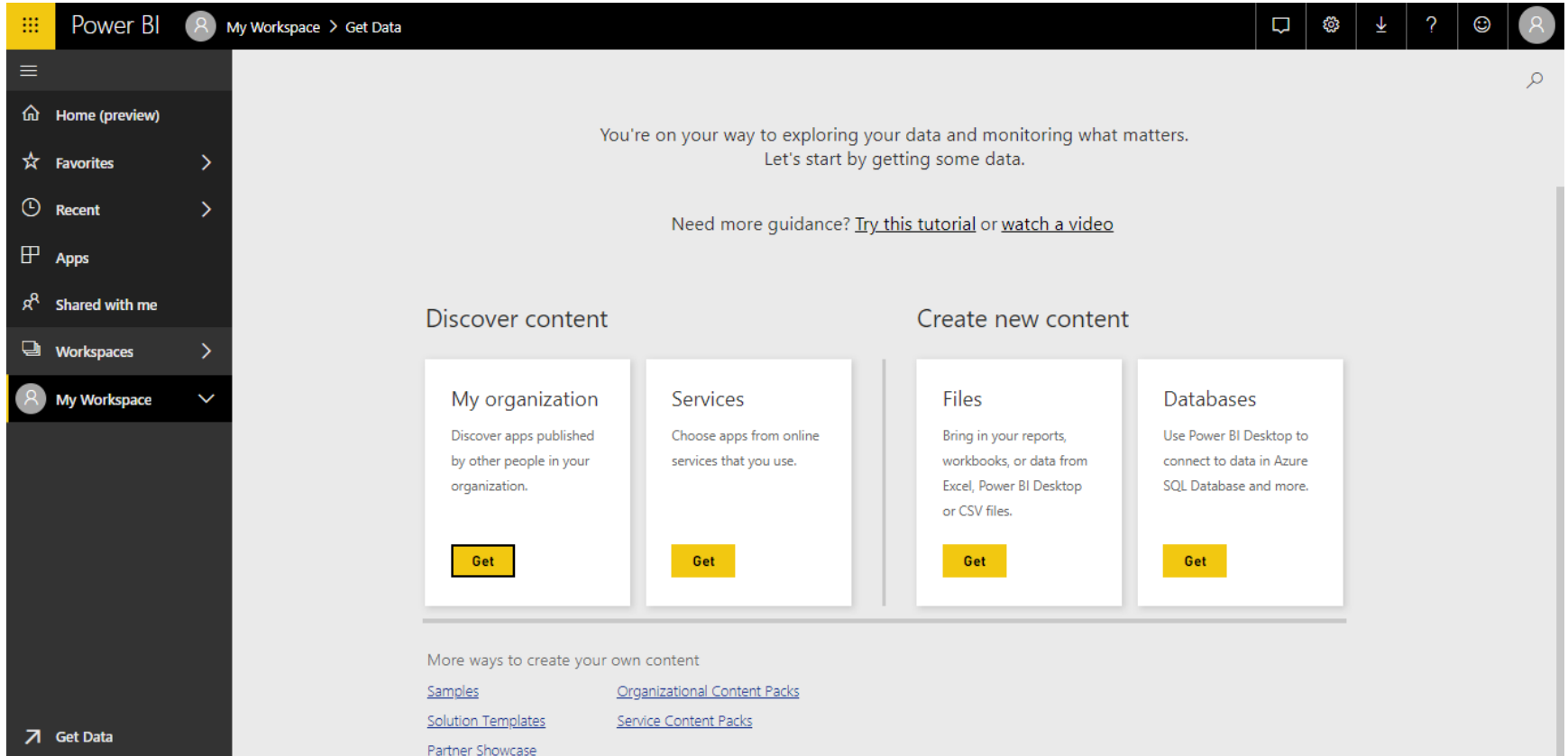
Use it free

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)

Signing In to Power BI Service

[www./powerbi.com](https://www.powerbi.com)



The screenshot shows the Power BI Service home page. The top navigation bar includes the Power BI logo, a user profile icon, and the text "My Workspace > Get Data". The left sidebar contains a menu with options: Home (preview), Favorites, Recent, Apps, Shared with me, Workspaces, and My Workspace (selected). The main content area features a welcome message: "You're on your way to exploring your data and monitoring what matters. Let's start by getting some data." Below this, there is a link to "Try this tutorial" or "watch a video". The page is divided into two main sections: "Discover content" and "Create new content". Under "Discover content", there are four cards: "My organization" (Discover apps published by other people in your organization), "Services" (Choose apps from online services that you use), "Files" (Bring in your reports, workbooks, or data from Excel, Power BI Desktop or CSV files), and "Databases" (Use Power BI Desktop to connect to data in Azure SQL Database and more). Each card has a yellow "Get" button. Under "Create new content", there are four links: "Samples", "Organizational Content Packs", "Solution Templates", and "Service Content Packs". At the bottom left, there is a "Get Data" button.

Power BI My Workspace > Get Data

Home (preview)
Favorites >
Recent >
Apps
Shared with me
Workspaces >
My Workspace

You're on your way to exploring your data and monitoring what matters.
Let's start by getting some data.

Need more guidance? [Try this tutorial](#) or [watch a video](#)

Discover content

My organization
Discover apps published by other people in your organization.
[Get](#)

Services
Choose apps from online services that you use.
[Get](#)

Create new content

Files
Bring in your reports, workbooks, or data from Excel, Power BI Desktop or CSV files.
[Get](#)

Databases
Use Power BI Desktop to connect to data in Azure SQL Database and more.
[Get](#)

More ways to create your own content

[Samples](#) [Organizational Content Packs](#)
[Solution Templates](#) [Service Content Packs](#)
[Partner Showcase](#)

Get Data

Understanding Power BI Service

- Welcome to Power BI page
- Power BI portal
- Power BI components
 - Datasets
 - Reports
 - Dashboards

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

Power BI Components

- Data sources, workbooks and datasets
- Reports
- Dashboards

The elements depend upon each other

Datasets → Reports → Dashboards

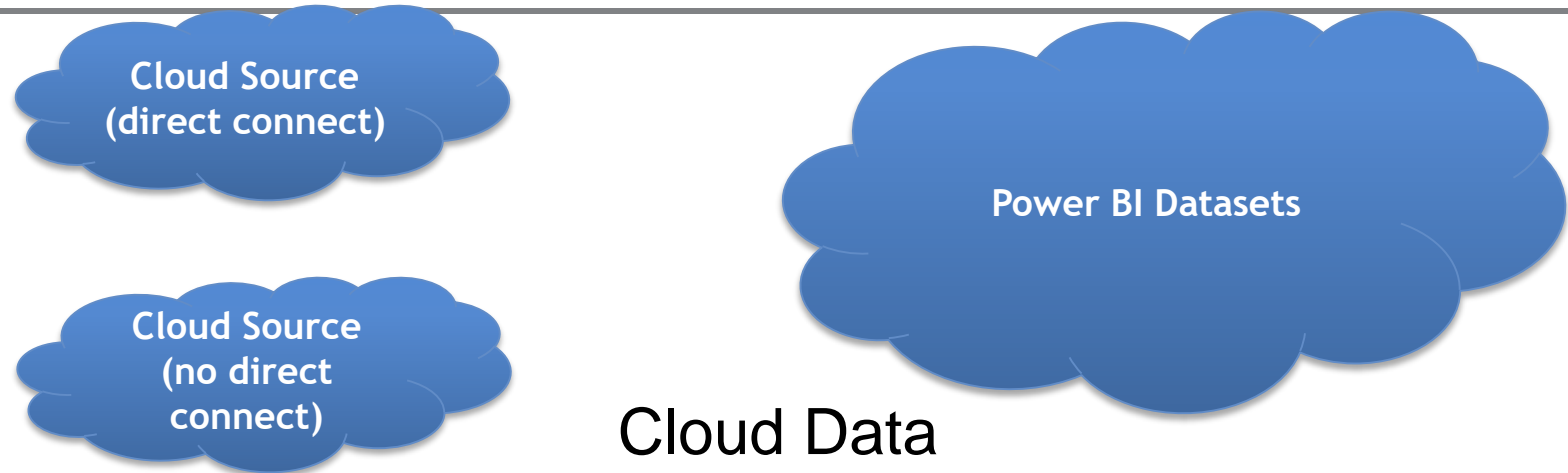
Power BI Components: Data Sources and Datasets

Datasets can have multiple tables / other sources

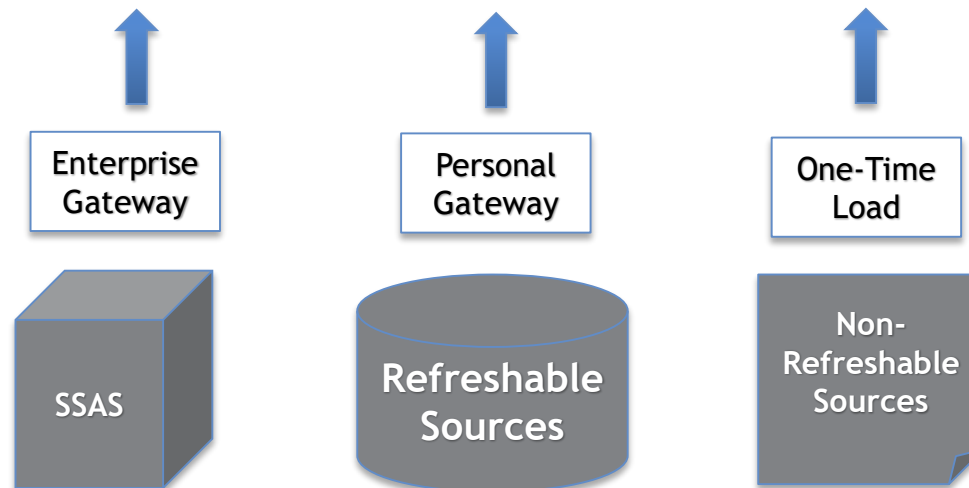
Two primary types of data sources

- 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

Power BI Components: Data Sources and Datasets



On-premises Data



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

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

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

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

Signing Up for Power BI Service

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

A black banner with yellow and white text. On the left, it says "It's free!" in large yellow font, followed by "Sign up for free or become a Pro User for even more storage and BI tools." in white. On the right, it says "Ready to get started?" in white. Below this is a white input field containing "wep3@data-architect.com" with a small 'x' icon to its right. To the right of the input field is a yellow button with the text "Use it free" in black. Below the input field, in small white text, it says "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
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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

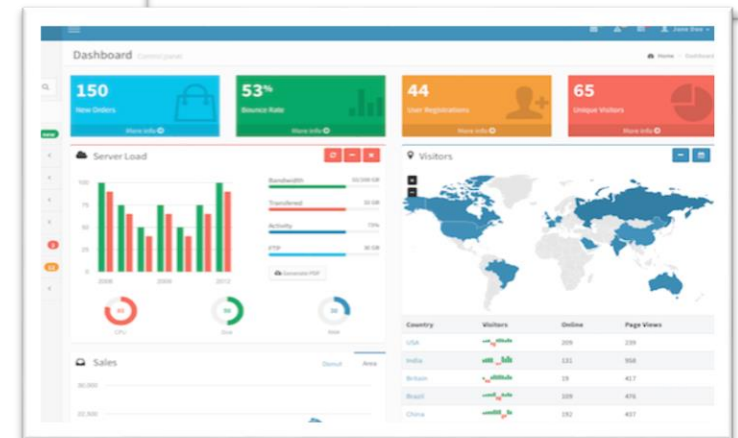
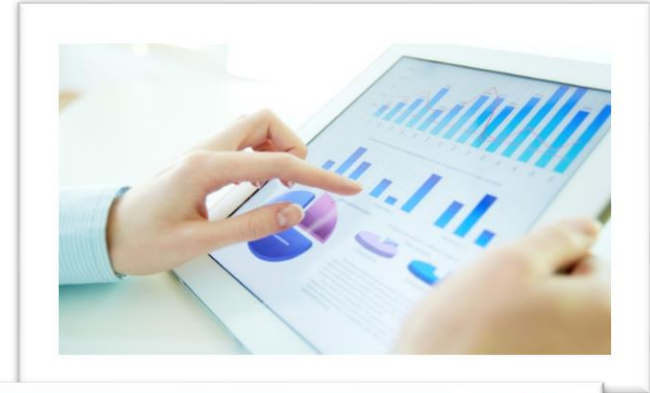
Business Analytics Consultants

Bridging the Gap Between Data & Decision Making



Business 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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ADDITIONAL RESOURCES

Upcoming Events

senturus.com/events



TIPS FOR INSTALLING COGNOS ANALYTICS 11.1.1

NEW VERSION, NEW STEPS, NEW INSTALLATION TOOL

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

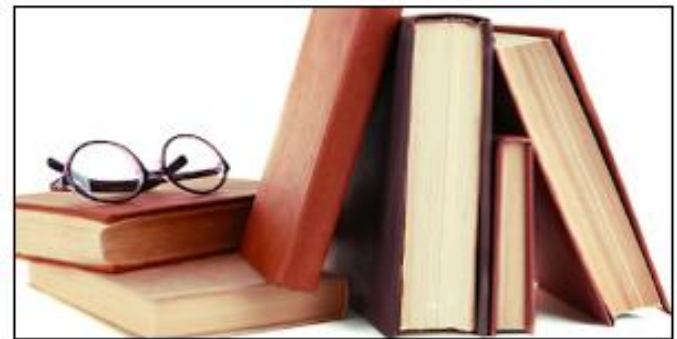
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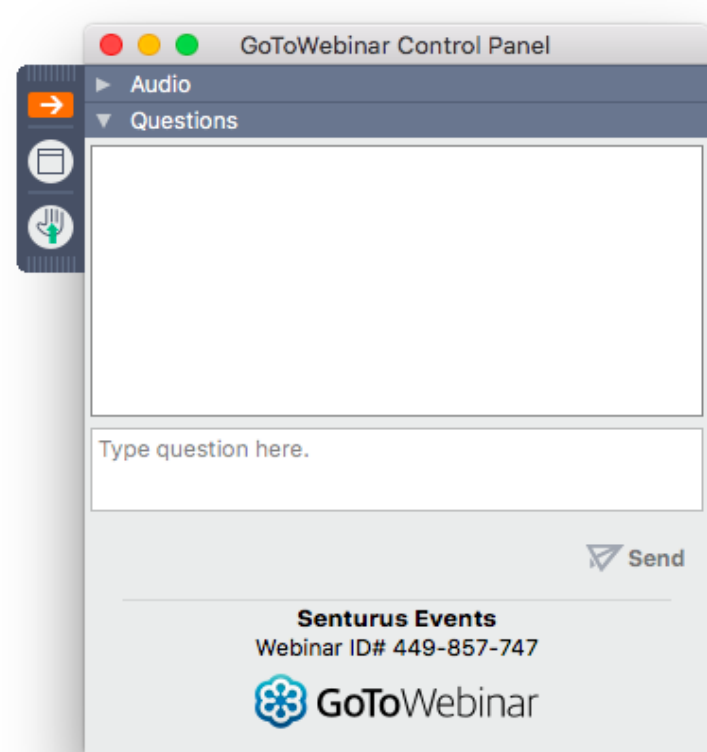
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Q&A

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.



Thank You!

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