

**rupe**

Quality | Integrity | Respect

Making Power BI work for you.

# Our training programme

Our training programme has been designed to help delegates become self-sufficient data analysts that can gather requirements, design and build data models and then create rich interactive reports and dashboards that are consistent with organisational standards and easy to understand.

It caters for people coming from different backgrounds and with differing skill levels.

The content has been designed based upon the evidenced needs of new Power BI Data Analysts (or more experienced analysts who are self-taught) and common requests for teaching topics.

## Course takeaways

- A certificate of attendance for each training course.
- Qualification for CERTIFIED badges once they have completed the required set of training courses.
- Course materials including slides, example Power BI files and templates

# General Training Information

## Public training

- All courses run over two days 10:00 - 15:00 except the free version of Dashboard in a Day which is a single day 09:00-17:00.
- All courses are delivered remotely via Teams.
- Attendees capped at 15 to ensure students get maximum attention.

## Private training

- Private training can be delivered remotely via Teams or delivered in-person.
  - In person training may be arranged upon enquiry.
- Tailored to your teams' needs and requirements.

## Pricing

- **Public training** is priced at **£400 + VAT** per person per course with discounts up to 25% for bulk purchases.
- **Private group training** is priced at **£300 + VAT** per person per course for a group of up to 15 students. Minimum £2100.
- **In person training** is priced separately and will include travel expenses and travel time.

# Power BI Dashboard in a Day

## Who's this course for?

Anyone new or relatively new to Power BI or those who are self-taught and want some best practice guidance.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed
- Some prior report writing experience or Excel pivot tables or equivalent

## A broad and shallow introduction to Power BI.

The training covers the end-to-end process of connecting to data, preparing data, creating reports, and publishing reports.

## Course Outline

- Connect to, import, & transform data from a variety of sources
- Define business rules & KPIs
- Data transformations in M
- Introduction to DAX
- Creating Data Visualisations
- Creating and sharing dashboards with others
- Publishing to the Power BI service

## Delivery

The free version of this course runs over one day 09:00 – 17:00.

The commercial version of this course runs over two days 10:00 – 15:00.

# Data Storytelling Best Practice & Principles

## Who's this course for?

Anyone that wants to communicate with data from report writers to those requesting reports and those creating data presentations.

## Prerequisites

None

**A technology independent training course suitable for those that want to learn how to better communicate with data.**

Learn how to design attractive reports that best communicate the desired story with data.

It is one thing to know how to build a report or dashboard in Power BI, Tableau, Qlik, etc., but it's another to know which chart types to use under different circumstances, how to make it look good and most importantly, how to make it easy for people to consume the information.

Which chart type should you use for different data stories? How can you best use your limited screen real estate? What colours should you use and where and why?

These and other important questions are addressed during this technology independent one-day Data Visualisation training course, based upon the teachings of Nick Desbarats, Stephen Few, Cole Nussbaumer Knaflic, Edward Tufte, and others.

## Course Outline

- Purpose, definitions, and goals of Data Visualisation.
- Some design concepts including design examples in everyday life
- Visual Perception: Human Visual perception and how it applies to data presentation.
- Data Visualisation Design Principles: 10 rules to guide your designs plus considerations for designing for accessibility as well as mobile devices.
- Choosing Effective Charts Visual Elements: Covers all common chart types including pros & cons and best practices.
- The Design & Build Process: The business and technical steps required to build effective data visualisations and the order in which they should be executed.
- Dashboard Design: Dashboard design rules, common mistakes, and real-life examples.
- Storytelling with Data: An introduction to storytelling with data to bring your visualisations to life and to help convince an audience.

# Power BI Data Storytelling Part 1

## Who's this course for?

Anyone looking to better communicate data stories to their intended audience using Power BI.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed.
- A base level of Power BI skills equivalent to having attended the Power BI Dashboard in a Day course.

## Best practice data visualisation in a Power BI context. Tips, tricks and pitfalls.

Power BI Data Storytelling Part 1 is a comprehensive training course designed to equip participants to communicate data stories to their intended audience effectively. Being able to communicate clear data stories is a crucial skill for every Power BI data professional.

This Power BI Data Storytelling training course integrates data storytelling best practice and principles with practical hands-on exercises to create impactful Power BI reports. Whether you are presenting a single chart, table, or complex dashboard, having a solid foundation in the art and science of data storytelling is an essential skill.

## Course Outline

PBIDS1 takes students through a "real world" scenario guiding them on how to choose charts to represent particular stories, how to use colour and how to apply the principle of less is more. A chapter is devoted to Power BI specific tips and tricks and how to avoid common pitfalls before the students bring together all they have learned in a dashboard build exercise.

- Scenario background & User Stories
- Chart Type selection
- Data Storytelling Best Practice & Principles
- Power BI Pitfalls, Tips, Tricks and Bits
- Dashboards

# Power BI Data Storytelling Part 2

## Who's this course for?

Anyone looking to better communicate data stories to their intended audience using Power BI.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed.
- A base level of Power BI skills equivalent to having attended the Power BI Dashboard in a Day course.

## More advanced Power BI visuals, drill throughs, tooltips, parameters and more.

This training course is suitable for those that want to take their Power BI Data Storytelling skills to the next level.

This course tackles more advanced topics such as Templates & Themes, Conditional Formatting & Sparklines, Trends & Forecasts, Custom Tooltips, Drill-Through pages, and much more including powerful features that are not commonly taught. These techniques can dramatically improve your data storytelling ability and drive increased adoption of Power BI in your organisation.

## Course Outline

- Themes & Templates
- Conditional formatting & Sparklines
- Trends & Forecasts
- Custom Tooltips
- Drill-through pages
- What-if Parameters
- Connection Types & Row-Level Security
- Power BI Service, Dashboards & Apps

# Power BI Data Preparation Part 1

## Who's this course for?

Those needing to learn how to design best-practice Power BI data models.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed.
- A base level of Power BI skills equivalent to having attended the Power BI Dashboard in a Day course.
- Have a basic understanding of Power BI reporting concepts such as tables, columns, rows, data types and how tables can be related.

## Why we model data for analysis, what happens when we don't, how to design a good model.

Attendees of this course will learn why we need to model data in Power BI according to industry dimensional modelling standards and what happens when we don't. They will then learn how to apply best practice data modelling techniques to design a Power BI data model that optimises performance, ease of use, flexibility, and accuracy.

Students will gain a grounding in the principles enabling them to design dimensional Power BI models for a wide variety of real-world scenarios. There are hands-on exercises throughout the day to reinforce learnings.

## Course Outline

- Overview & Rationale for data modelling in Power BI
- Illustrating the problems encountered with a poor Power BI data model
  - Poor performance
  - Cryptic organisation
  - Lack of flexibility
  - Many to many relationships
  - Bi-directional filters
- Basic dimensional modelling theory as applicable for Power BI
- Exercise to redesign the poor example Power BI data model
- Exercises that illustrating the problems with a poor Power BI data model compared with a pre-prepared best practice Power BI data model

# Power BI Data Preparation Part 2

## Who's this course for?

Those needing to learn how to design best-practice Power BI data models.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed.
- A base level of Power BI skills equivalent to having attended the Power BI Dashboard in a Day course.
- Have attended Power BI Data Preparation Part 1 or have a good understanding of dimensional modelling theory.

## How to build a good practice data model with Power Query.

Attendees of this course will learn how to connect Power BI to different data sources, apply rich transformations to the data, and build a best practice Power BI data model that optimises performance, ease of use, flexibility, and accuracy. Students will delve into M (or Power Query) as well as Power BI data modelling, common errors and best practice.

Students will gain a grounding in the principles of data preparation and data modelling enabling them to build reports combining data from multiple sources. There are hands-on Power BI exercises throughout the day to reinforce learnings.

## Course Outline

- Connecting to data sources
- Data quality & profiling
- Cleaning the data
- Joining data from different source systems
  - Common errors with joins and data models and how to fix them
  - Structuring Power BI queries for optimal and correct joins
- Exploration of M functions such as Column by Example, Pivoting and Unpivoting, Indexes, creating tables, the advanced editor and Custom Functions
- Preparing your model to support time intelligence
- When to use M or DAX
- Model tuning and optimising maintenance tasks

# Power BI DAX Introduction

## Who's this course for?

Anyone looking to enhance their Power BI data models and reports with DAX.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed.
- A base level of Power BI skills equivalent to having attended the Power BI Dashboard in a Day course.
- Have attended Power BI Data Preparation Part 1 or have a good understanding of dimensional modelling theory.

## An introduction to Data Analysis eXpressions (DAX), the query language for Power BI.

Attendees of this course will learn the foundational concepts of the DAX language, equipping them with the skills to enrich their Power BI data models and reports.

Being able to write effective DAX formulas is essential for getting the most out of your data in Power BI. DAX is the native formula and query language for Power BI Desktop, Microsoft PowerPivot and SQL Server Analysis Services Tabular models. DAX formulas are used in measures, calculated columns, calculated tables, and row-level security.

## Course Outline

- Introduction & DAX Overview
- Variables, when and how to use them
- An introduction to the Table Functions you need to know
- Row Context and Filter Context, why they're important, and how to use them
- Making the most of the powerful and versatile CALCULATE function
- How to leverage Relationships in DAX
- Using Time Intelligence functions such as SAMEPERIODLASTYEAR, PREVIOUSQUARTER, etc.

# BI Success

## Who's this course for?

Anyone just an interest in wanting to succeed where others have not.

## Prerequisites

- A recent (< 6 months old) version of Power BI Desktop installed
- A base level of Power BI skills equivalent to having attended the Power BI Dashboard in a Day course.

## How can you ensure that your business intelligence (or data and analytics) function is successful?

The sad fact is that most BI projects fail according to Gartner and many other commentators. This two half days workshop will help yours succeed.

Most BI Projects fail. Depending on which survey you read, the BI failure rate is anywhere from 50% – 80%. Gartner is widely quoted as saying it is 70%.

We start the workshop by discussing why that may be and brainstorming what we believe are the most common reasons. We then compare the groups' results with the top reasons that we at rupe have collated from our experience of over 40 years and our research.

After defining what success means we then delve into the top reasons for failure to understand them in greater depth and think about how we can mitigate them.

We wrap up with a session focussing on how we can ensure our BI initiatives succeed. This includes the mitigation factors derived from the previous sessions but also introduces some extra (and uncommon) positive measures that will make a difference if you can implement them.

## Course Outline

- Why BI Projects Fail
  - Poor communication
  - Poor data quality
  - Lack of buy-in from the Board
  - Complexity
  - And many more!
- How my BI function will succeed

Please get in touch if you have any questions.  
We look forward to hearing from you.

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