

The image features the O'Reilly logo in white, bold, sans-serif capital letters, with a registered trademark symbol (®) at the end. The logo is centered horizontally and positioned in the middle of the frame. The background is a gradient of orange and yellow, with several large, semi-transparent circles of varying shades of orange and red overlaid, creating a layered, abstract effect.

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Power BI Bootcamp

Nicolás Lagreste Zucchini

María Florencia Hourcouri



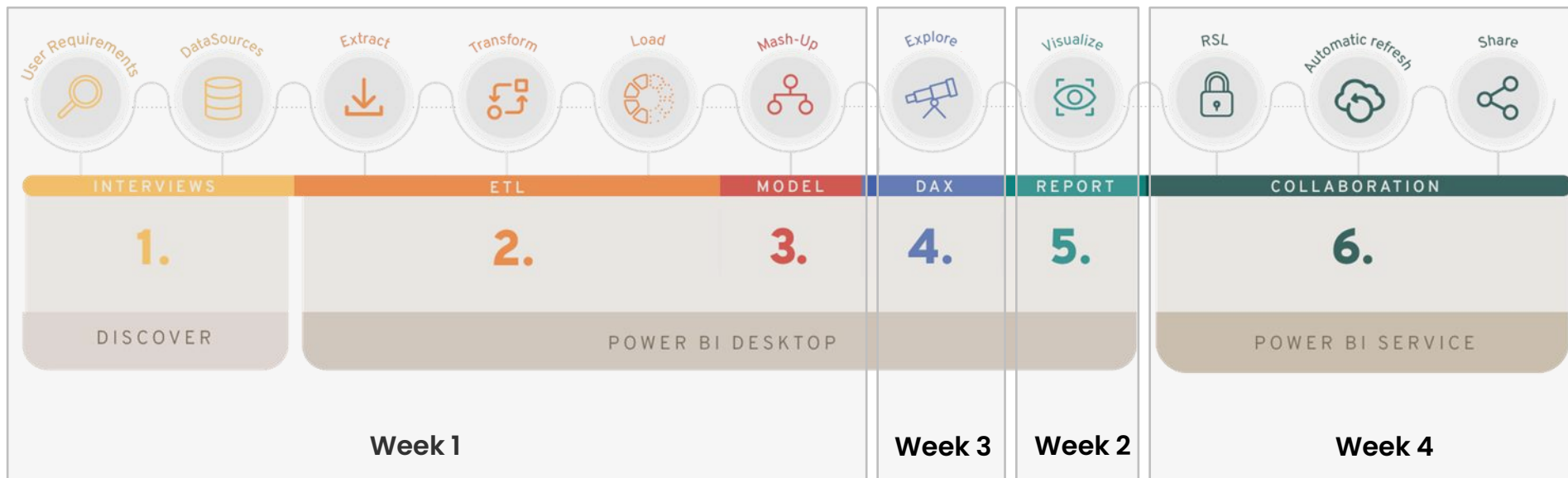


Course Agenda

- **Week 1:** Introduction to Business Intelligence, Power BI and Power Query.
- **Week 2:** Advanced and Interactive Visuals.
- **Week 3:** Calculated measures, columns & custom tables with Power BI Programming Language (DAX).
- **Week 4:** Ways to collaborate and share in Power BI.



Our Method: Flow of Report Development



INTERVIEWS

ETL

MODEL

DAX

REPORT

COLLABORATION



About us:



Nicolás Lagreste Zucchini 

✉ nico@analyticmood.com

🌐 www.analyticmood.com

analytic mood

- **Co-founder of Analytic Mood** — Leading data solutions and business strategies.
- **Experienced Data Expert and Business Analyst** — Extensive experience with NTT Data, Kabel, BI Applications, Grupo Solutio and Analytic Mood.
- **Microsoft Power BI Lead** — Oversees the full development cycle from design to deployment.
- **Power BI Community Speaker** — Presented at the latest Power BI Summit, engaging with industry peers.



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analytic mood

- **Co-founder of Analytic Mood** — Pioneering data-driven solutions and strategic innovations.
- **Educational Background** — Holds a Master's degree in "Business Intelligence & Technological Innovation" from EAE Business School.
- **Consultant & Trainer in Microsoft Power BI** — Expert in guiding professionals through Power BI applications and analytics.
- **Power BI Community Contributor** — Recently spoke at the Power BI Summit, sharing expertise with fellow data enthusiasts.



Exercise 0.0 – Initial set up

Download the shared .ZIP

Link: <https://www.analyticmood.com/en/resources>

User: PBIUser

Pass: Oreilly\$2023



NOTE: use the latest version of Power BI Desktop.



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WEEK 04

Ways to collaborate
and share in Power BI.





Week 4: Ways to collaborate and share in Power BI.

- How to share your reports or dashboard in Power BI Service.
- How to collaborate with coworkers in workspaces to create meaningful reports and dashboards.
- How to collaborate in Microsoft Teams.
- How to print reports.
- How to publish to the web. This allows you to publish Power BI reports to the whole Internet by embedding visualizations in blog posts, websites, social media, and other online communications.



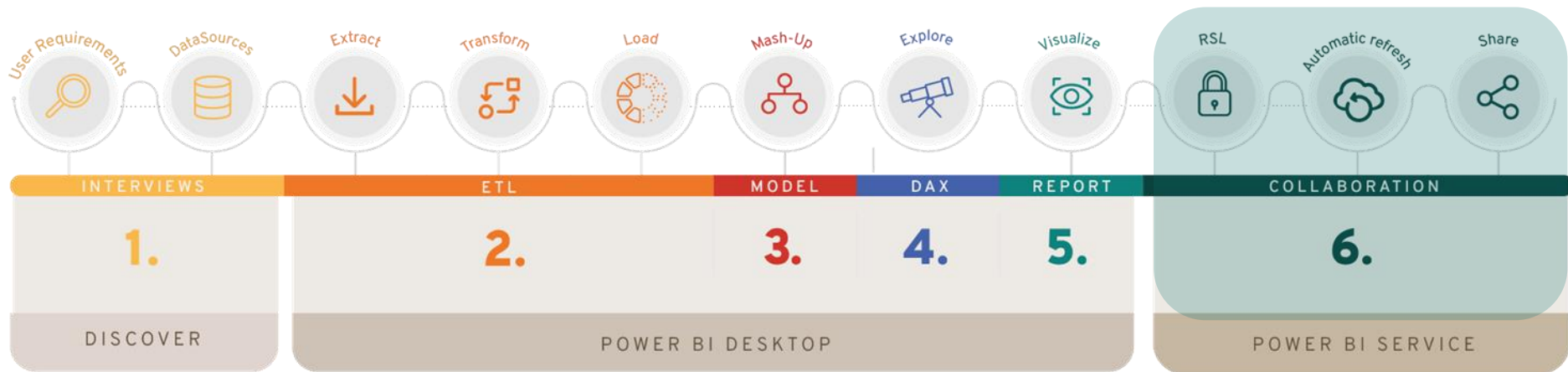


Introduction to Power BI Service

- Review of Week 3 and Exercise 3.5
- Presentation: Introduction to Power BI Service.
- Demo Case 4.1: Log in and Publish the report.
- Exercise Case 4.1
- Q&A



Our Method: Flow of Report Development





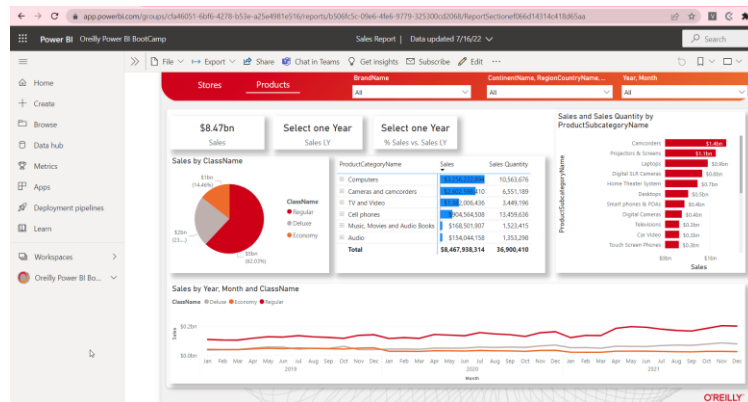
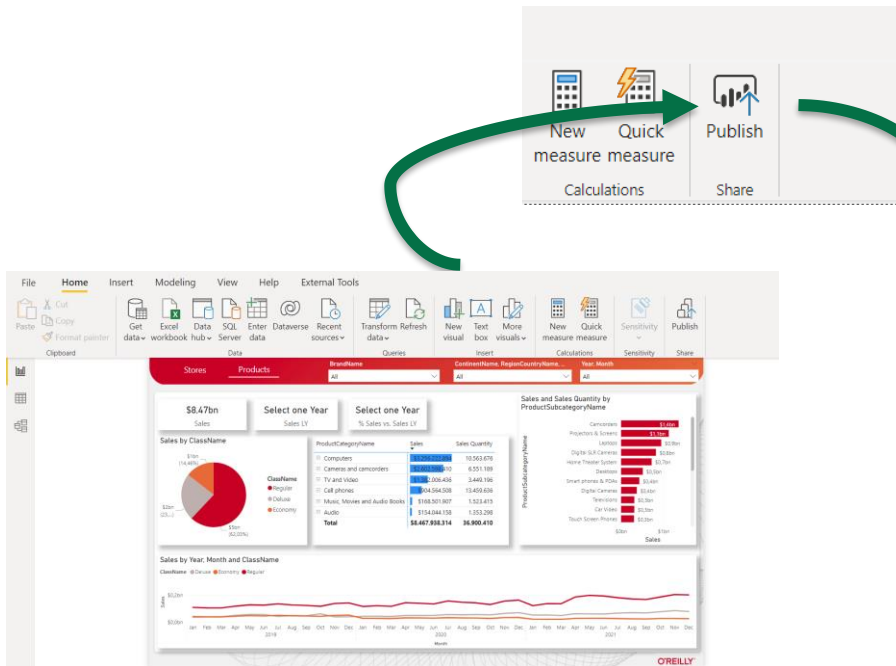
Demo 4.1



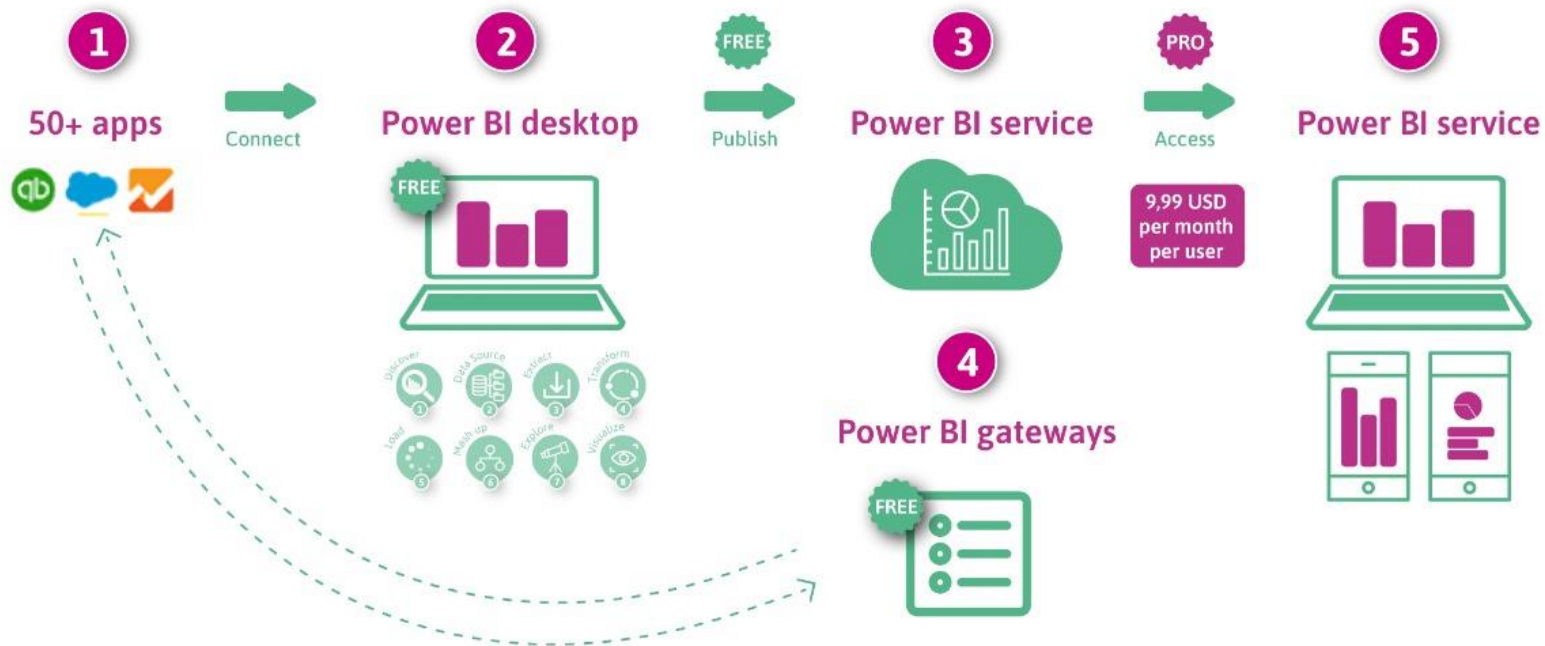


Introduction to Power BI Service

Before we start, we are going to publish the report created in the previous module. We do it through Power BI Desktop, with the Publish button.



Power BI architecture

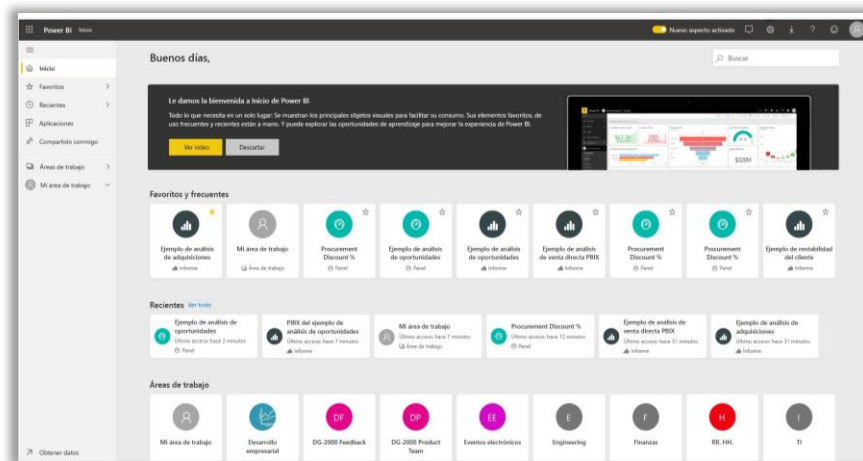


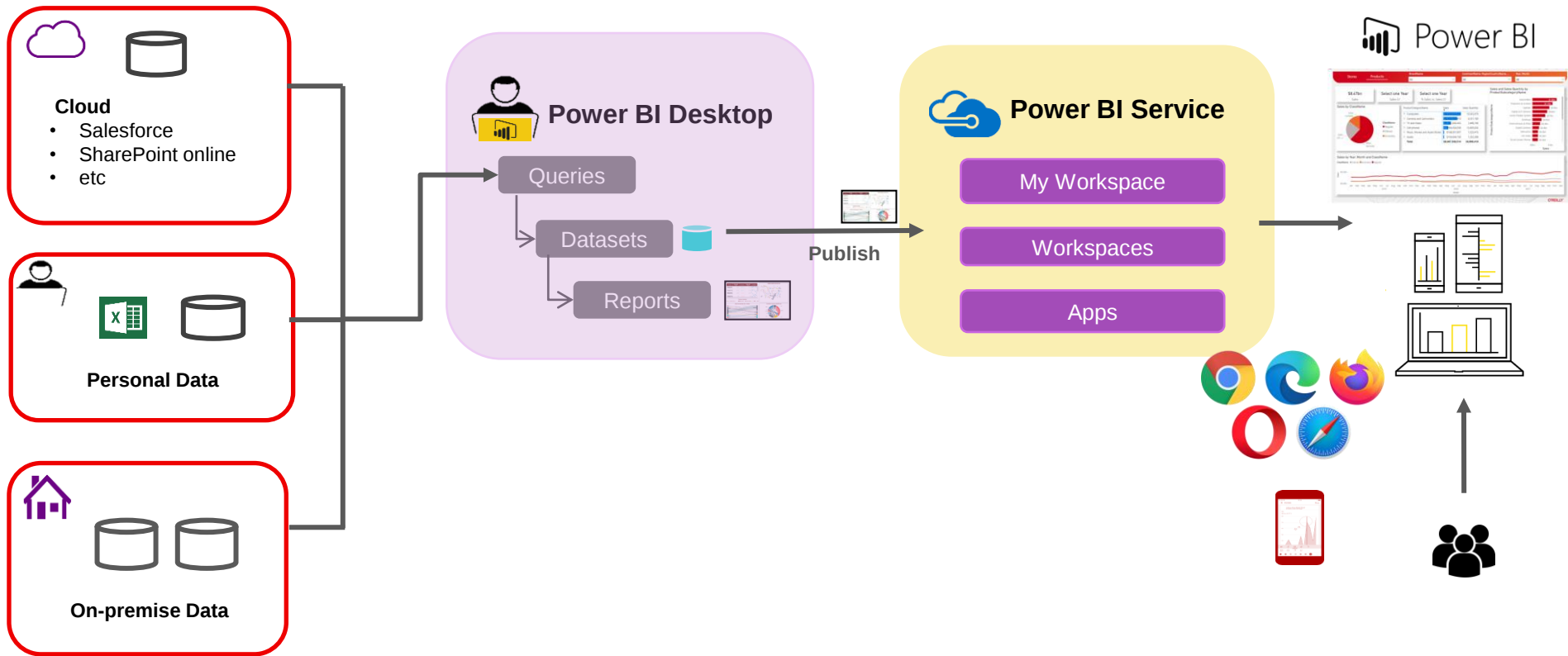


Introduction to Power BI Service

Power BI is a cloud-based business analytics service that allows anyone to:

- Visualize and analyze data faster, more efficiently and more consciously
- Connect users to a wide variety of data
- Use easy-to-use dashboards, interactive reports and engaging visualizations that bring data to life
- Insights from any device
- Collaboration across your organization

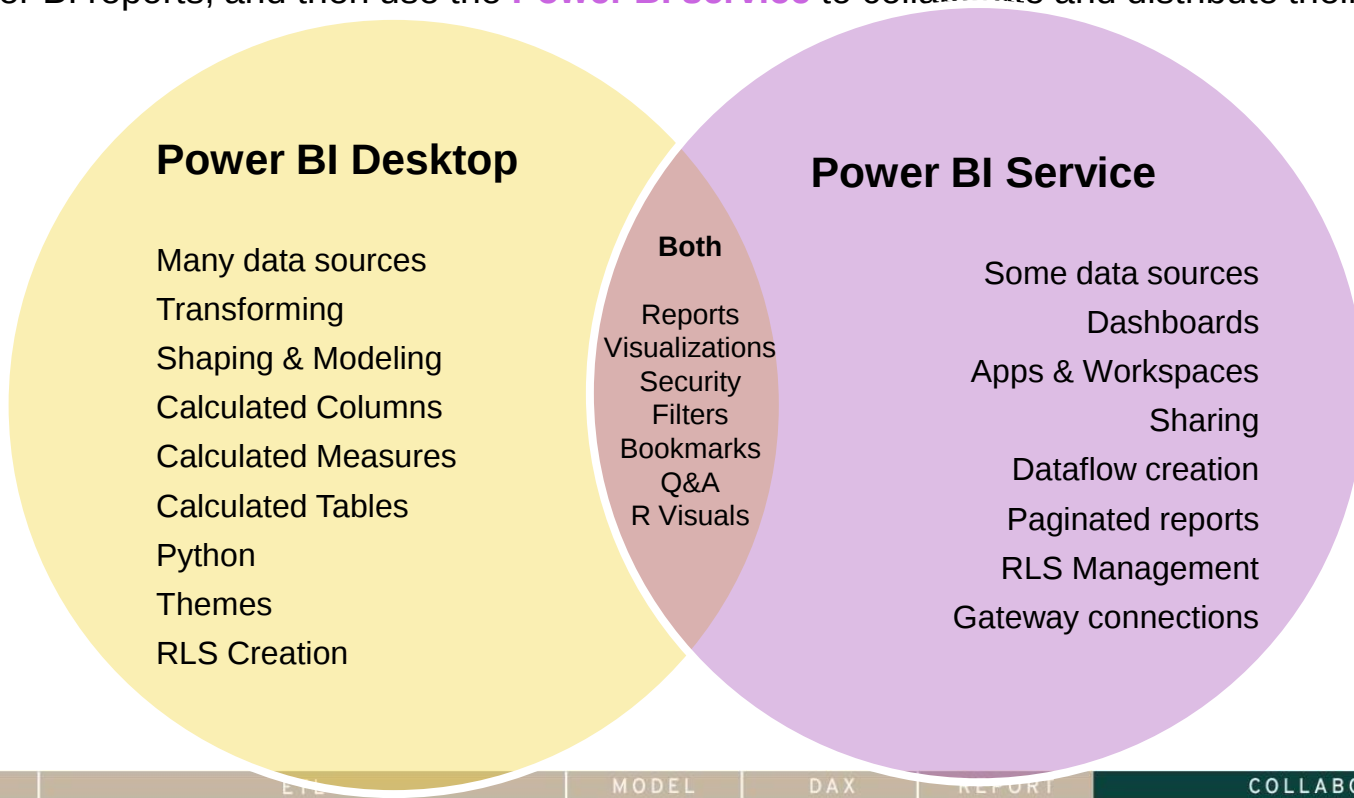






Introduction to Power BI Service

Most Power BI report designers who work on business intelligence projects use **Power BI Desktop** to create Power BI reports, and then use the **Power BI service** to collaborate and distribute their reports.



Poll



You can publish a report to the Power BI service without having a Pro account.

- ☐ True
- ☐ False





Exercise 4.1





Exercise 4.1

- **Goal:** Deliver reports and dashboards to other users
- Open the file ***Exercise4.1.pbix***
- **Save it as “X_Y_Report”.**
 - X → Initial of name*
 - Y → Initial of surname*
- Log in Power BI Desktop with the user:
 - training01@analyticmood.com → (surnames A-K)
 - training02@analyticmood.com → (surnames L-S)
 - training03@analyticmood.com → (surnames T-Z)

Password: AnalyticMood123
- Publish the report in the work area: **My Workspace**
- Validate that it has been uploaded correctly. Go to app.powerbi.com on your browser.



Sharing Reports

- Demo 4.2: How to share reports:
 - ❑ Workspaces
 - ❑ Apps
 - ❑ Types of members and access
 - ❑ Publish to Web



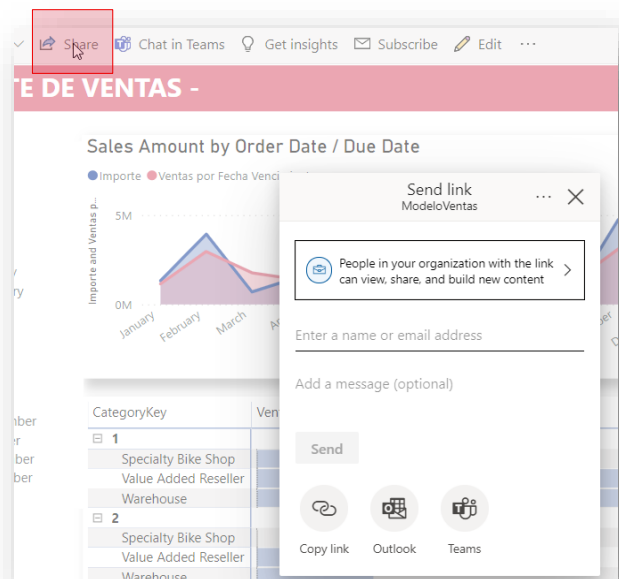
Demo 4.2





Sharing

Sharing is the easiest way to give people access to your reports and dashboards in the Power BI service. You can share with people inside or outside your organization.



When you share a report or dashboard, the people you share it with can view it and interact with it, but can't edit it. The recipients see the same data that you see in the reports and dashboards.

They also get access to the entire underlying dataset, unless row-level security (RLS) is applied to it. The coworkers you share with can reshare with their coworkers if you allow them to.



Sharing

Prerequisites:

- You need a Power BI Pro or Premium Per User (PPU) license, whether you share content inside or outside your organization.
- Your recipients also need Power BI Pro or Premium Per User (PPU) licenses, unless the content is in a Premium capacity.
- If you want to allow recipients to edit a shared report, you have to assign the user a workspace role that allows editing. To learn more about role-level permissions and how to assign roles, read Roles in workspaces.

Where you can share

- You can share reports and dashboards from My Workspace.
- You can share from workspaces other than My Workspace, if you have the Admin or Member role in the workspace. If you have the Contributor or Viewer role, you can share if you have Reshare permissions.
- You can share from the Power BI mobile apps.
- You can't share directly from Power BI Desktop. You publish reports from Power BI Desktop to the Power BI service.



My Workspace

My workspace is your personal sandbox where you can create content for yourself.

You can see your workspaces in Power BI by selecting Workspaces from your navigation pane.

Good evening, Nicolás

Find and share actionable insights to make data-driven decisions

+ New report

Recommended

- Getting started with Power BI: Explore basic Power BI concepts
- Getting started with Power BI: Intro—What is Power BI?
- Getting started with Power BI: Quick start—Getting around in the...
- Getting started with Power BI: View and understand a Power BI re...
- Getting started with Power BI: How to: Know y

Recent Favorites My apps

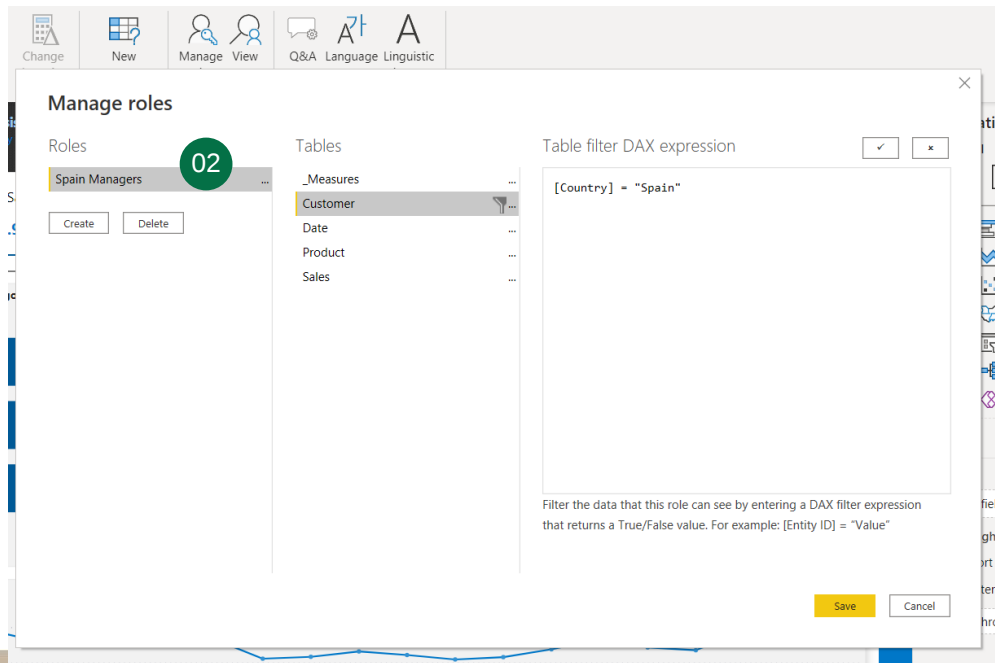
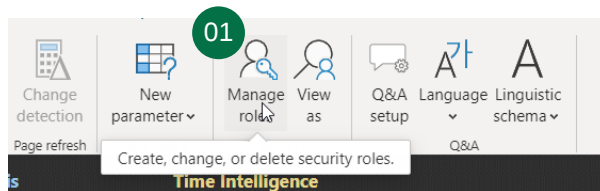
Filter by keyword Filter

Name	Type	Opened	Location	Endorsement	Sensitivity
My workspace	Workspace	now	Workspaces	—	—
Exercise3.6	Report	26 minutes ago	Oreilly Power BI Boot...	—	—



Security: Role's creation

- In Power BI Desktop



Create security roles using RLS.

All rows in tables where the specified DAX condition applies will be filtered.



Security: Role's creation

- In Power BI Service

01

All Content Datasets + dataflows

	Name	Type	Owner
	Exercise3.6	Report	Oreilly Po
	Exercise3.6		reilly Po
	Sales Report		reilly Po
	Sales Report DataSet		reilly Po

Analyze in Excel

Create report

Create paginated report

Create formatted table

Delete

Quick insights

Security

Rename

02

Row-Level Security

Spain Managers (0)



Roles created on desktop

Members (0)

People or groups who belong to this role

Enter email addresses

Add

Assign the users we want to have that role (filter)



Apps

- It allows the business users to view and interact with the reports shared by Power BI Service.
- Reports and dashboards can be distributed to a larger audience
- Users cannot personalize or create filters for existing reports/dashboards.

Security settings:

Private: Only members of the group will be able to view the contents.

Public: Any member of the organization will be able to see the contents.

Demos

Setup Navigation Permissions

Build your app

App name *

Demos

Description *

Enter a summary

200 characters left

Support site

Share where your users can find help

App logo

Upload

Delete

App theme color

Contact Information

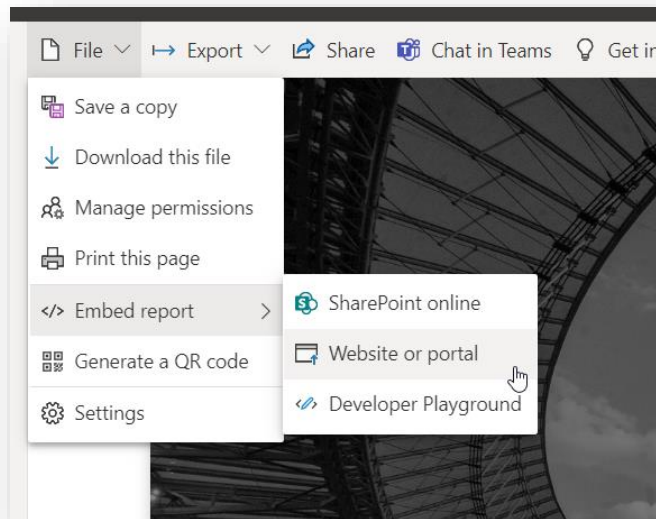
Show app publisher

Publish to Web

- New functionality that allows you to embed the created reports in a web page or blog and share the amazing visual effects through your emails or social networks. You can reach millions of users with any device and from anywhere.

Warning

When you use **Publish to web**, anyone on the Internet can view your published report or visual. Viewing requires no authentication. It includes viewing detail-level data that your reports aggregate. Before publishing a report, make sure it's okay for you to share the data and visualizations publicly. Don't publish confidential or proprietary information. If in doubt, check your organization's policies before publishing.



Licencing



Power BI FREE

- Includes 1 GB of storage in Import Mode
- Cannot be shared with other users (reports, dashboard and datasets)
- Sharing reports is only possible in Public Mode
- Does not include Dataflows

Power BI PRO

- All the functionality of Power BI
- Monthly cost of \$10 USD per User / Month (plus applicable taxes)
- Includes 10 GB of storage in Import Mode
- Annual subscription required, more information at

Power BI Premium

- Monthly subscription required
- Has a minimum base cost to cover
- Based on the amount of resources to be used
- This option is recommended from 500 users (cost-benefit)
- Additionally includes Power BI Report Server licensing (on-premise)
- Part of Office 365 subscription

Power BI Embedded

- Licensing according to requirements
- Has a minimum base cost to cover
- Based on the amount of resources to be used and does not require PRO licenses to visualize
- PRO license is required to design / model
- Has limitations compared to the Power BI Free / PRO versions
- Does not include mobile access

Power BI Premium Per User

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



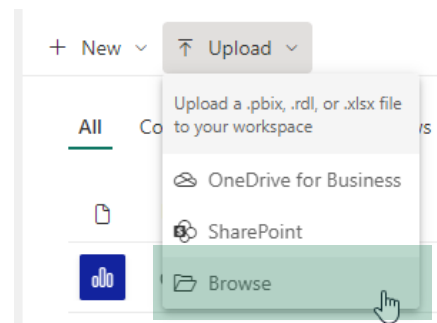
Exercise 4.2





Exercise 4.2

- **Goal:** Interacting and editing
- Access Power BI Service (Remember: app.powerbi.com on your browser).
- Find your report in your “*My Workspace*” and share it with:
 - training@analyticmood.com
- *Challenge 01:* try accessing the workspace: **Oreilly Workspace** and upload your report here.





Full capabilities of Power BI Service

- Demo Case 4.3: exploring the capabilities
- See the difference between a Report and a Dataset.
- Show Dashboards.
- Export data to PDF, PowerPoint
- Connect to the model from Excel
- Republish PBIX File.



Demo 4.3





Report / DataSet

When a PBIX is published in the service, file will be divided into a report and a Data Set:

	Name	Type
	Sales Report	Report
	Sales Report DataSet	Dataset

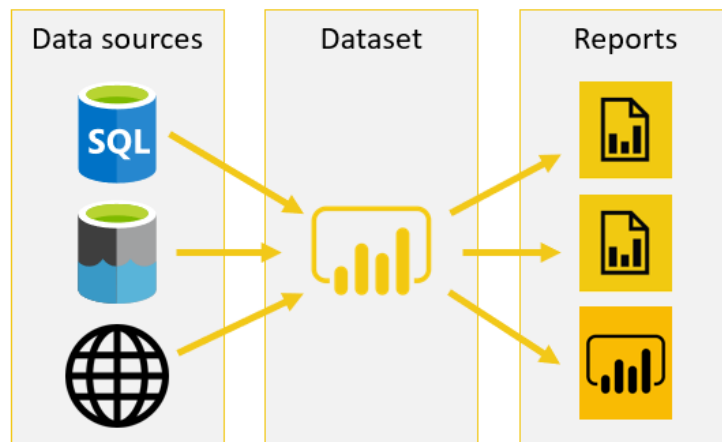
DataSet = Model. Tables, relations, Dax formulas.

Report: All visual elements: Charts, tables, sliders, etc.

DataSet

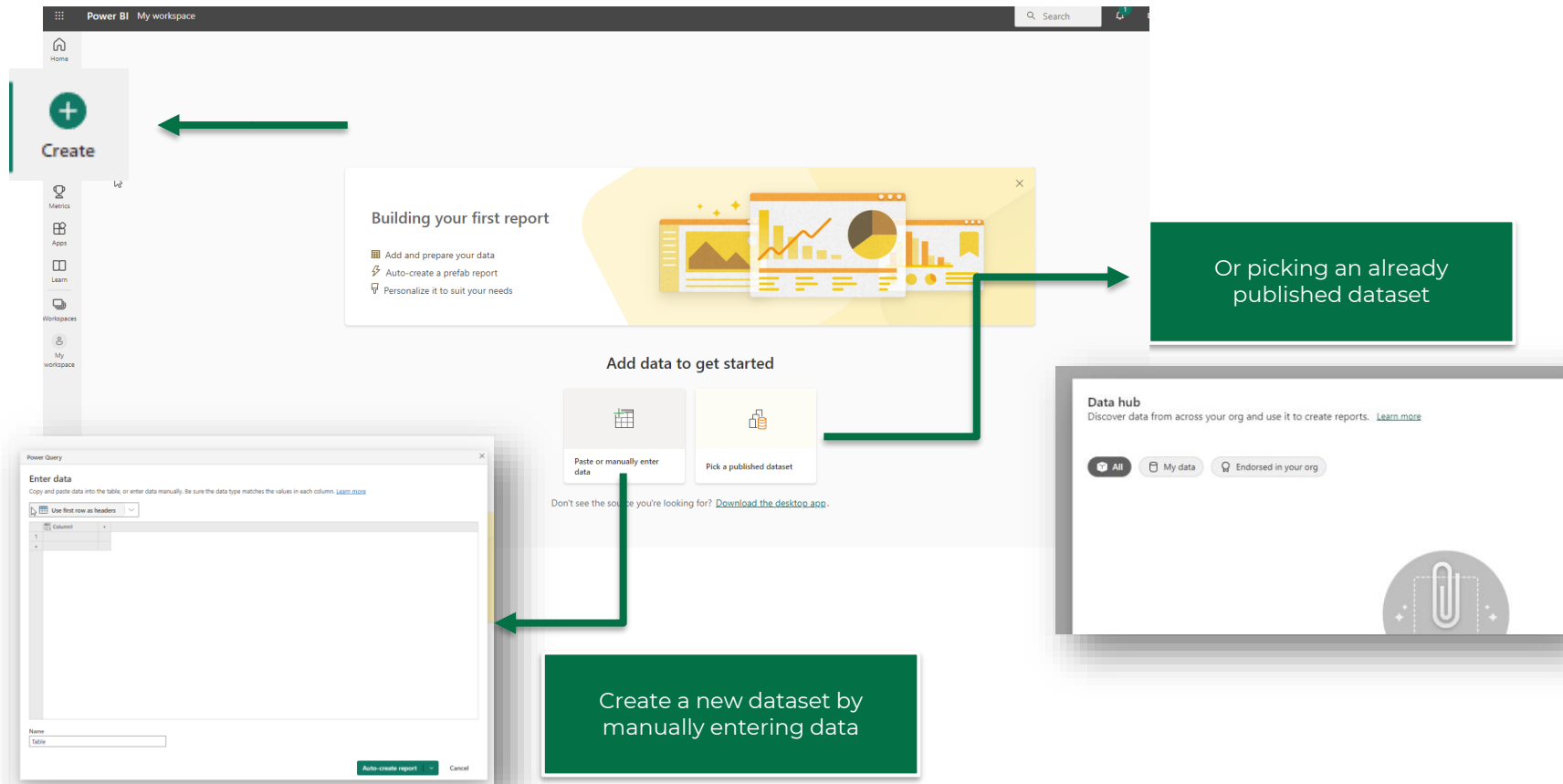
A dataset is a collection of data that you import into the tool. Power BI allows you to import and connect to certain types of datasets and put them all in one place.

In the navigation bar, the datasets you have connected to appear under the Datasets heading. Each dataset in the list represents a data source, for example, an Excel workbook in OneDrive, a local SSAS tabular dataset, or a CRM 365 database.





DataSet





DataSet

Example of creating
a new DataSet

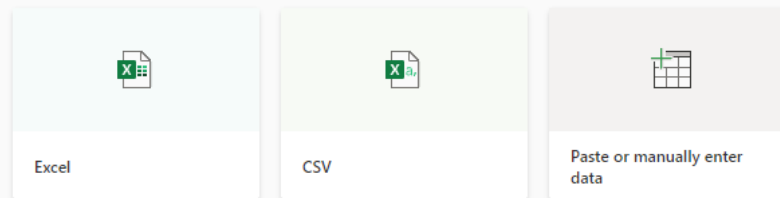
 My workspace

+ New ▾ Upload ▾

-  Report
Visualize your data
-  Paginated report
Build a paginated report
-  Dashboard
Build a single-page data story
-  Dataset
Create a dataset to use in a report
-  Streaming dataset
Build visuals from real-time data

and we'll show you h

Add data to get started



Don't see the source you're looking for? [Download the desktop app.](#)

Select a file

Quick access

As you open files from shared libraries, they'll appear in this Quick access list.

[More places...](#)



New datasets can be created within the service by importing data from Excel or CSV files.

DataSet



Settings for Sales Report DataSet

[View dataset](#)

This dataset has been configured by nico@analyticmood.com.

[Refresh history](#)

- ▶ Dataset description
- ▶ Gateway connection
- ▶ Data source credentials
- ▶ Parameters
- ▶ Scheduled refresh
- ▶ Q&A
- ▶ Featured Q&A questions
- ▶ Endorsement and discovery
- ▶ Request access
- ▶ Large dataset storage format
- ▶ Dataset...

Settings configuration

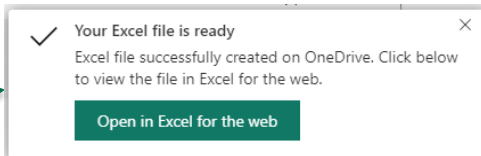
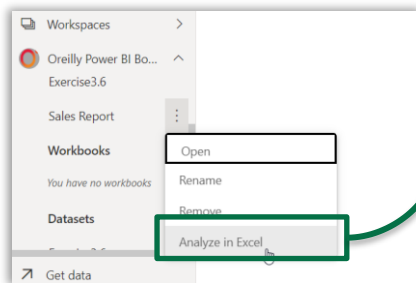
By default the datasets are updated once a day, but this can be modified and refreshed manually or an update schedule can be created.

- Refresh History: Displays the update history.
- Gateway Connection: Indicates whether the Gateway is connected and online.
- Data Source Credentials: Shows if the credentials used to connect to the data source are correct.
- Parameters: Displays the parameter settings.
- Schedule Refresh: A refresh schedule can be configured.
- Featured Q&A questions: List of questions to be displayed to those consuming reports based on the dataset.
- Endorsement: Approved or certified dataset.

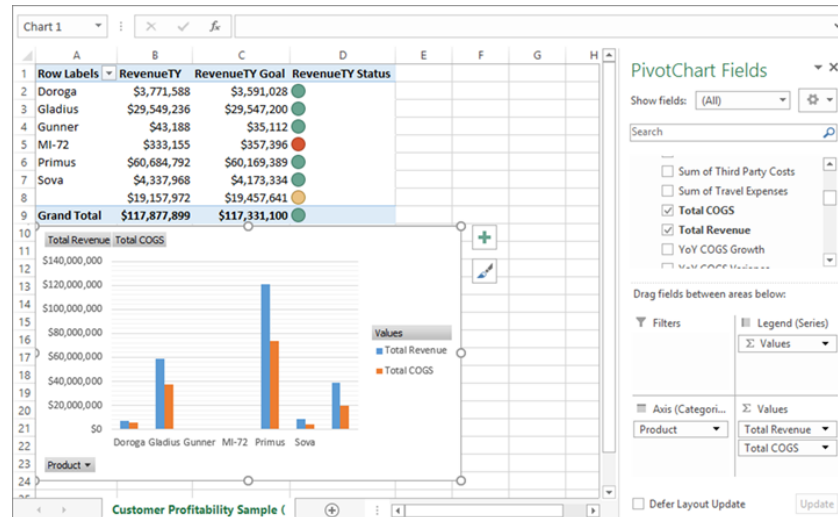


DataSet

Analyze in Excel



New functionality that allows us to export the data source in order to analyze it from Excel.





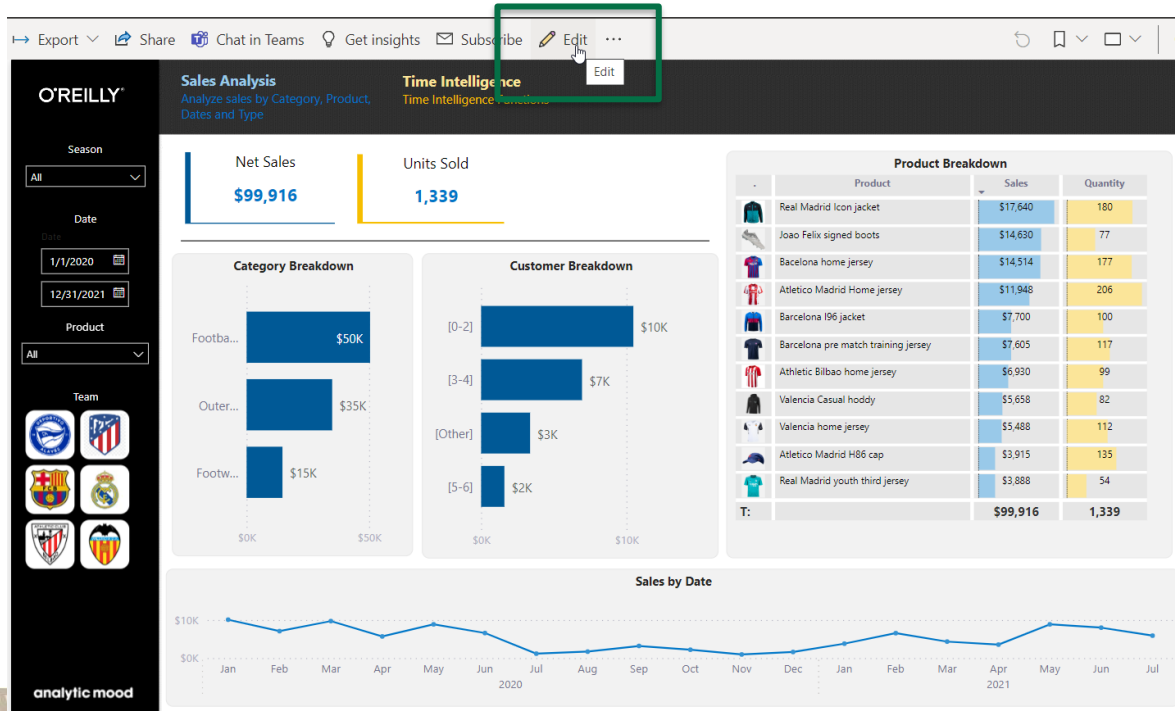
Report

- A Power BI report is one or more pages of visualizations (tables and charts, such as line charts, pie charts, rectangle charts, and more). Visualizations are also called visual objects.
- All visualizations in a report come from a single data set.
- Reports can be created from scratch in Power BI, can be imported with dashboards that colleagues share with you, or can be created by connecting to datasets from Excel, Power BI Desktop, databases, SaaS applications, and content packages.

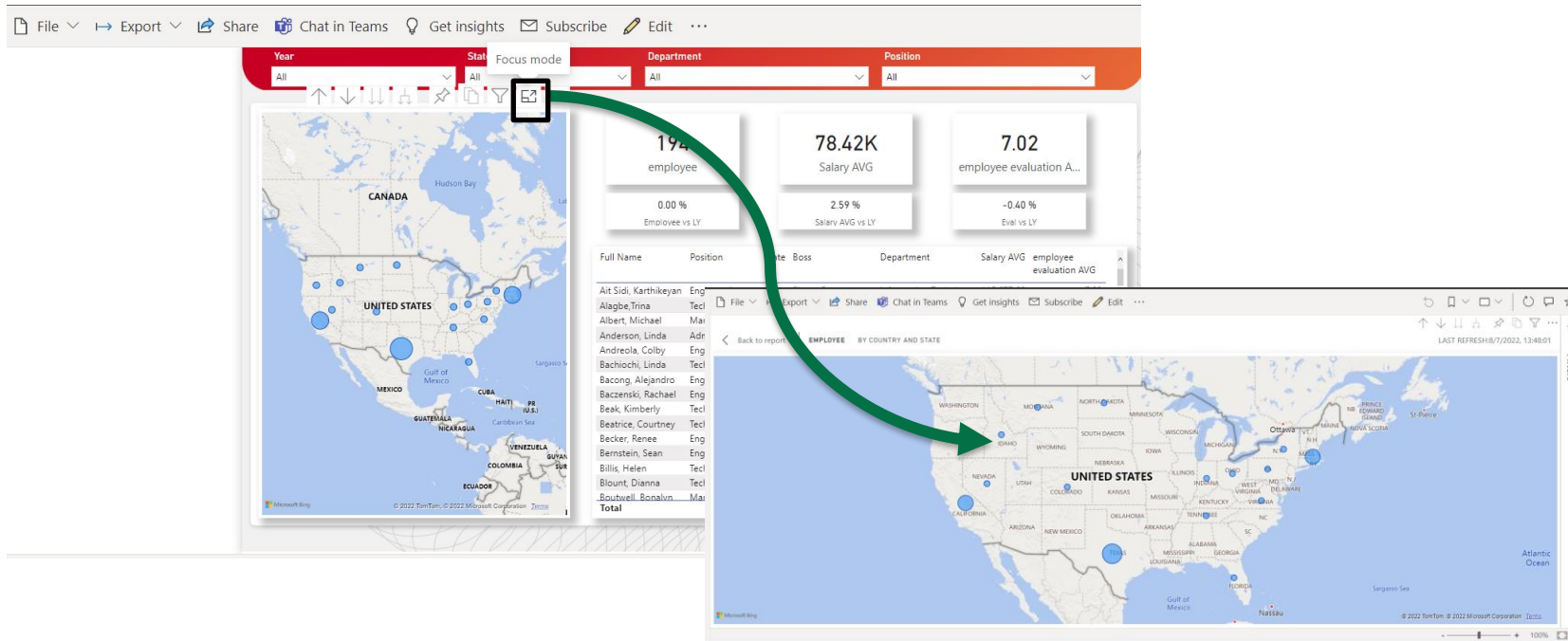


Report – Edit

- We can edit a report from within the service.
- Remember that not all Power BI Desktop functionalities are accessible from here.



Report view



Report view



File Export Share Chat in Teams Get insights Subscribe Edit

Year State Department Position

All All All All

Full screen
Fit to page
Fit to width
Actual size
High-contrast color

194 employee
78.42K Salary AVG
7.02 employee evaluation A...

0.00 % Employee vs LY
2.59 % Salary AVG vs LY
-0.40 % Eval vs LY

Full Name Position State Boss Department

Alt Sidi, Karthikeyan	Engineer II	MA	Simon Roup	Information Techn
Alagbe, Trina	Technician I	CA	Elijah Gray	Production
Albert, Michael	Manager	MA	Janet King	Production
Anderson, Linda	Administrative II	TX	David Stanley	Admin Offices
Andreola, Colby	Engineer II	CA	Alex Sweetwater	Software Engineer
Bachiochi, Linda	Technician I	TX	Brannon Miller	Production
Bacong, Alejandro	Engineer I	TX	Peter Monroe	Information Techn
Baczinski, Rachael	Engineer I	TX	Alex Sweetwater	Software Engineer
Beak, Kimberly	Technician II	CA	Kelley Spirea	Production
Beatrice, Courtney	Technician II	CA	Elijah Gray	Production
Becker, Renee	Engineer I	MA	Simon Roup	Information Techn
Bernstein, Sean	Engineer I	TX	Alex Sweetwater	Software Engineer
Billis, Helen	Technician I	TX	Brannon Miller	Production
Blount, Dianna	Technician II	MA	Michael Albert	Production
Boutwell, Bonalyn	Manager	CA	Elijah Gray	Admin Offices
Total				

Year State Department Position

All All All All

194 employee
78.42K Salary AVG
7.02 employee evaluation A...

0.00 % Employee vs LY
2.59 % Salary AVG vs LY
-0.40 % Eval vs LY

Full Name Position State Boss Department Salary AVG employee evaluation AVG

Alt Sidi, Karthikeyan	Engineer II	MA	Simon Roup	Information Technology	115,677.60	7.33
Alagbe, Trina	Technician I	CA	Elijah Gray	Production	37,800.00	8.67
Albert, Michael	Manager	MA	Janet King	Production	100,389.00	6.00
Anderson, Linda	Administrative II	TX	David Stanley	Admin Offices	61,789.00	8.67
Andreola, Colby	Engineer II	CA	Alex Sweetwater	Software Engineering	67,904.33	9.67
Bachiochi, Linda	Technician I	TX	Brannon Miller	Production	45,441.33	7.00
Bacong, Alejandro	Engineer I	TX	Peter Monroe	Information Technology	86,213.42	8.00
Baczinski, Rachael	Engineer I	TX	Alex Sweetwater	Software Engineering	88,416.00	5.67
Beak, Kimberly	Technician II	CA	Kelley Spirea	Production	86,942.40	7.67
Beatrice, Courtney	Technician II	CA	Elijah Gray	Production	74,083.75	8.00
Becker, Renee	Engineer I	MA	Simon Roup	Information Technology	81,558.95	5.33
Bernstein, Sean	Engineer I	TX	Alex Sweetwater	Software Engineering	88,416.00	5.33
Billis, Helen	Technician I	TX	Brannon Miller	Production	30,789.33	8.00
Blount, Dianna	Technician II	MA	Michael Albert	Production	71,246.50	7.33
Boutwell, Bonalyn	Manager	CA	Elijah Gray	Admin Offices	66,307.58	7.00
Total					78,422.33	7.02

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Export data to PDF, PowerPoint

File Export Share Chat in Teams Get insights Subscribe Edit ...

Analyze in Excel
PowerPoint
PDF

Year: All State: All Department: All Position: All

194 employee
0.00 % Employee vs LY

78.42K Salary AVG
2.59 % Salary AVG vs LY

7.02 employee evaluation A...
-0.40 % Eval vs LY

Map of North America showing locations in the United States, Canada, Mexico, and Central America.

Full Name	Position	State	Boss	Department	Salary AVG	employee evaluation AVG
Ait Sidi, Karthikeyan	Engineer II	MA	Simon Roup	Information Technology	115,677.60	7.33
Alagbe, Trina	Technician I	CA	Elijah Gray	Production	37,800.00	8.67
Albert, Michael	Manager	MA	Janet King	Production	100,389.00	6.00
Anderson, Linda	Administrative II	TX	David Stanley	Admin Offices	61,789.00	8.67
Andreola, Colby	Engineer II	CA	Alex Sweetwater	Software Engineering	87,904.33	9.67
Bachiochi, Linda	Technician I	TX	Brannon Miller	Production	45,441.33	7.00
Bacong, Alejandro	Engineer I	TX	Peter Monroe	Information Technology	86,213.42	8.00
Baczinski, Rachael	Engineer I	TX	Alex Sweetwater	Software Engineering	88,416.00	5.67
Beak, Kimberly	Technician II	CA	Kelley Spirea	Production	86,942.40	7.67
Beatrice, Courtney	Technician II	CA	Elijah Gray	Production	74,083.75	8.00
Becker, Renee	Engineer I	MA	Simon Roup	Information Technology	81,558.95	5.33
Bernstein, Sean	Engineer I	TX	Alex Sweetwater	Software Engineering	88,416.00	5.33
Billis, Helen	Technician I	TX	Brannon Miller	Production	30,789.33	8.00
Blount, Dianna	Technician II	MA	Michael Albert	Production	71,246.50	7.33
Boutwell, Bonalyn	Manager	CA	Elijah Gray	Admin Offices	66,307.58	7.00
Total					78,422.33	7.02

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Create reports based on datasets from different workspaces

- To create a report on an existing dataset, you can start in Power BI Desktop or in the Power BI service. In the service you should go to "My Workspace" or some other workspace you have access to.

Option 01 -Service

01



Oreilly Power BI BootCamp

+ New Create a pipeline

Report Visualize your data

Paginated report

02

Add data to get started



Paste or manually enter data



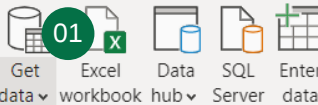
Pick a published dataset

03

Name	Endorsement	Owner	Workspace	Refreshed
Exercise3.6	-		Oreilly Power BI BootCamp	8/21/22, 1:51:56 PM
Ventas y Costes FAR10	-		AnalyticMood	8/21/22, 5:33:13 AM
Team 6	-		Power BI Neueda	8/12/22, 4:10:51 PM
Team 4	-		Power BI Neueda	8/11/22, 4:23:46 PM

Option 02 - Desktop

01



Common data sources

Excel workbook

Power BI datasets

Power BI dataflows

02

to create reports. [Learn more](#)

Filter by keyword

Filter (1)

Owner	Workspace	Refreshed	Sensitivity
Nicolás Lagre...	Oreilly Power BI Boot...	8/21/22, 1:51:56 PM	-
Maria Florenc...	AnalyticMood	8/21/22, 5:33:13 AM	-
Training Anal...	Power BI Neueda	8/12/22, 4:10:51 PM	-
Training Anal...	Power BI Neueda	8/12/22, 4:23:46 PM	-
Training Anal...	Power BI Neueda	8/11/22, 11:55:29 PM	-



Full practice with a connection to SharePoint and how scheduled updates work.

- Demo 4.4:
- Full practice connecting to SharePoint from Power BI Desktop
- Publish in Service of Power BI
- Configure the automatic refresh of the report.



Demo





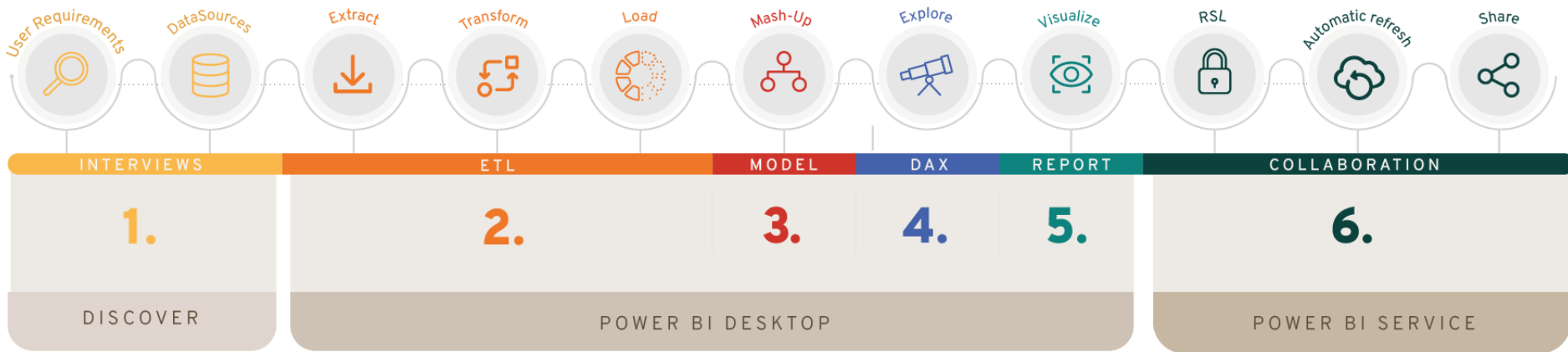
FINAL DEMO

Full example to recap flow of
development





Our Method: Flow of Report Development





Interviews

Understand processes, needs and data sources



- Where are our employees located?
- Which is the position and department with the highest salary and evaluation?
- Salary and performance evaluation through years



Interviews

Understand processes, needs and data sources



- Excel Workbook
- Text/CSV
- XML
- JSON
- Folder
- PDF
- Parquet
- SharePoint folder
- SQL Server database
- Access database
- SQL Server Analysis Services database
- Oracle database
- IBM Db2 database
- IBM Informix database (Beta)
- IBM Netezza
- MySQL database

- Share Point



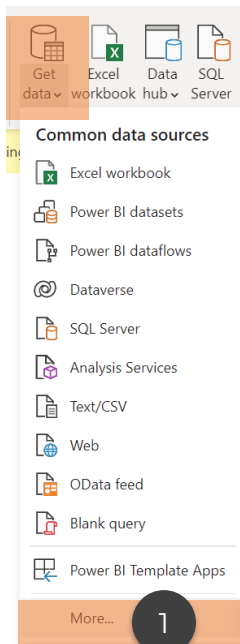
Power BI Desktop: Power Query

Clean and transform data sources

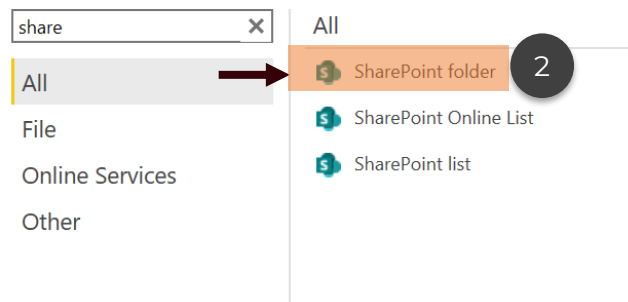
Extract



Connection to
SharePoint
folder



Get Data



SharePoint folder



OK

Cancel



Power BI Desktop: Power Query

Clean and transform data sources

Extract



Filter the
specific file

<https://biapps.sharepoint.com/sites/Cursos>

Content	Name	Extension	Date accessed	Date modified	Date created	Attributes
Binary	HHRRR.xlsx	.xlsx	null	11/02/2022 18:24:34	11/02/2022 18:24:34	Record

The data in the preview has been truncated due to size limits.

Combine

4

Transform Data

Cancel



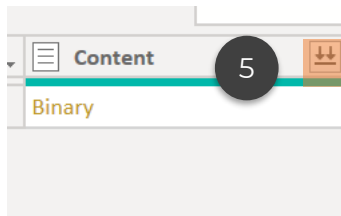
Power BI Desktop: Power Query

Clean and transform data sources

Transform



Filter the
specific file



Combine Files

Select the object to be extracted from each file. [Learn more](#)

Sample File: First file

Display Options

Parameter1 [3]

Employee

Performance evaluation

Salary

Salary

ID Empleado	Salary	Date
1205033102	26536	01/01/2018
1211051232	27684	01/01/2018
1204032927	28153	01/01/2018
1308060366	28865	01/01/2018
1408069882	29135	01/01/2018
1202031618	30150	01/01/2018
1001735072	30600	01/01/2018
1011022887	31152	01/01/2018
1304055987	32015	01/01/2018
1107027392	32400	01/01/2018
1302053339	32615	01/01/2018
1305057440	33015	01/01/2018
1203032357	34126	01/01/2018
1309061015	34200	01/01/2018
1211050793	55146	01/01/2018
1311063114	42974	01/01/2018
1406068293	36784	01/01/2018
711007713	36900	01/01/2018
1011022814	37156	01/01/2018
1011022883	37800	01/01/2018

☐ Skip files with errors

6

OK

Cancel



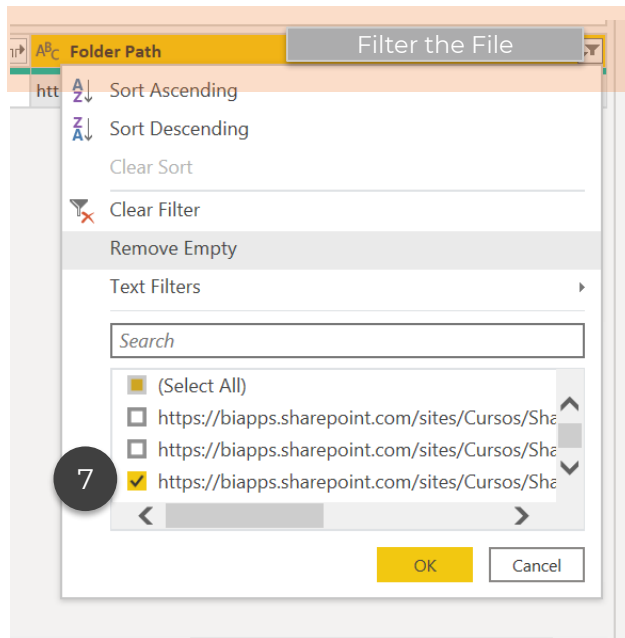
Power BI Desktop: Power Query

Clean and transform data sources

Transform



**Filter the
specific file**





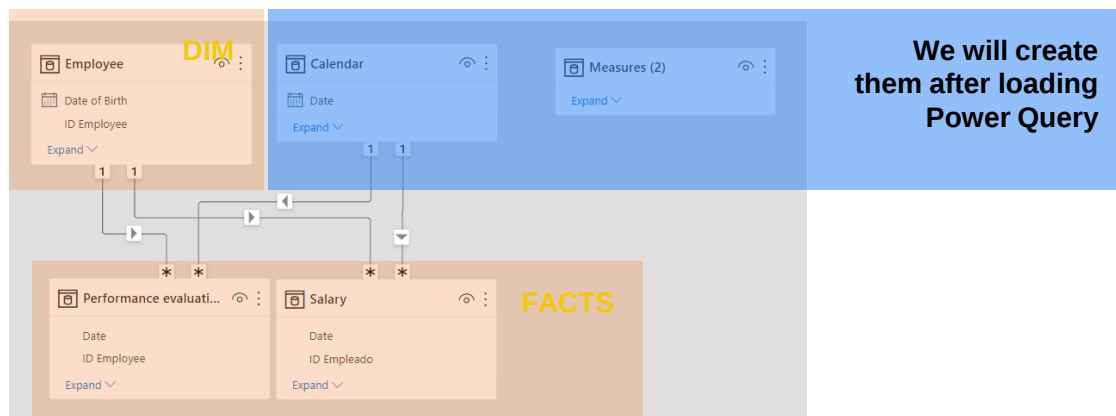
Power BI Desktop: Power Query

Clean and transform data sources

Transform



Plan the model and transform the structure of data if necessary.





Power BI Desktop: Power Query

Clean and transform data sources

Transform



Plan the model and transform the structure of data if necessary.

WHO: DIM EMPLOYEE

ID Employ	Full Name	Date of Birth	Departme	Position	Boss	Age	ID State
1000974650	Stanley, Davi	jueves, 17 de diciembre de 1970	Admin Office	Manager	Debra Houli	50	15
1106026579	Gordon, Dav	lunes, 21 de mayo de 1979	Admin Office	Administrati	David Stanle	41	15
1201031308	Foster-Baker	miércoles, 16 de abril de 1969	Admin Office	Manager	David Stanle	52	15
1409070147	Dunn, Amy	miércoles, 28 de noviembre de 1973	Admin Office	Manager	Debra Houli	47	15
1304055947	Anderson, Li	domingo, 22 de mayo de 1977	Admin Office	Administrati	David Stanle	43	15
1106026572	LaRotonda, V	domingo, 26 de abril de 1964	Admin Office	Administrati	David Stanle	57	15

MERGE

DIM EMPLOYEE DETAIL

ID State	State	Country
1	CA	EEUU
2	CO	EEUU
3	FL	EEUU
4	ID	EEUU
5	IN	EEUU
6	MA	EEUU



Power BI Desktop: Power Query

Clean and transform data sources



Plan the model
and transform
the structure of
data if
necessary.

1 Merge Queries

2 Merge

Select a table and matching columns to merge.

Employee

ID Employee	Full Name	Date of Birth
1000974650	Stanley, David	17/12/
1106026579	Gordon, David	21/05/
1201031308	Foster-Baker, Amy	16/04/
1409070147	Dunn, Amy	28/11/

3 Columns to Expand

Columns to Expand

Aggregate

Expand All Columns

Expand

OK Cancel

Join Kind

Left Outer (all from first, matching from second)

Use fuzzy matching to perform the merge

Fuzzy matching options

The selection matches 194 of 194 rows from the first table.

OK Cancel

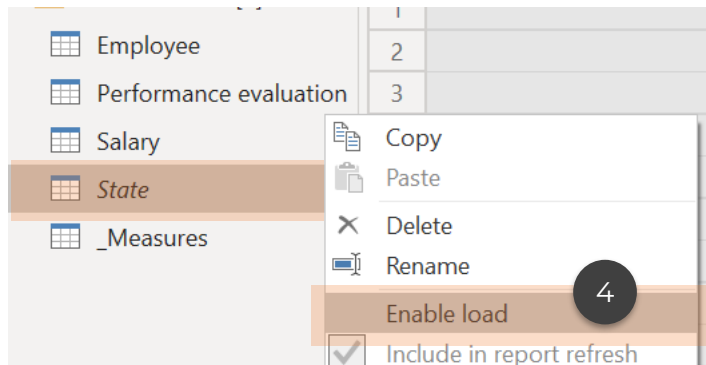


Power BI Desktop: Power Query

Clean and transform data sources



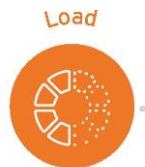
Plan the model and transform the structure of data if necessary.



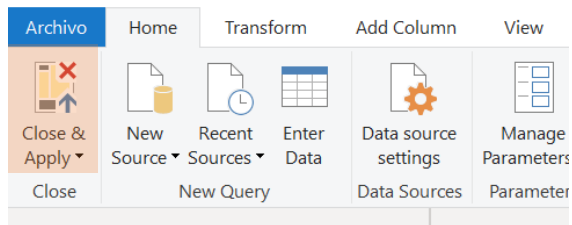


Power BI Desktop: Power Query

Clean and transform data sources



**Load data to
Power BI**





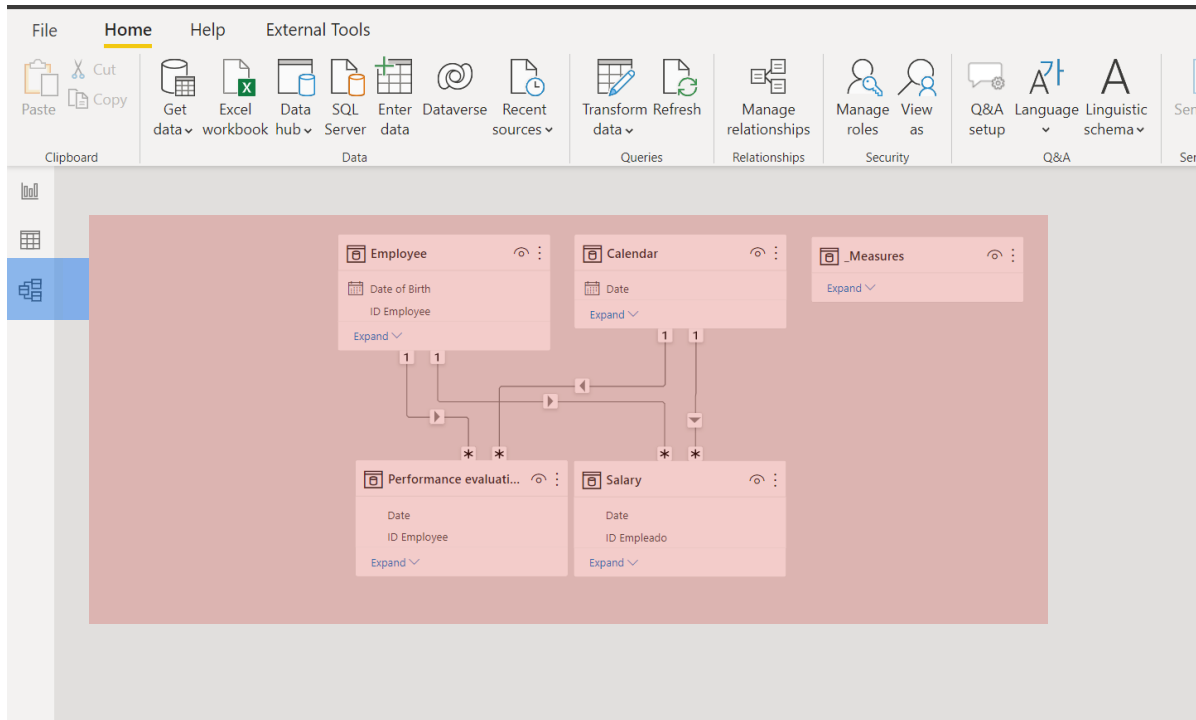
Power BI Desktop: Model

Mash-Up tables to create a model that allowed different analysis



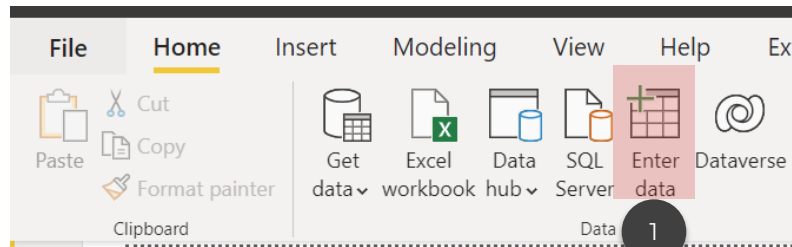
Create:

- Calendar
- _Measures
- Make the relations





Create Measure table



Create Table

	Column1	+
1		
+		

Name:

2

Load

Edit

Cancel



Create Calendar table

File Home Help External Tools Table tools Column tools

Paste Cut Copy Get data Excel Data SQL Server Enter data Dataverse Recent sources Transform data Refresh data Manage relationships New measure Quick measure New table

ID Employee	Date	Performance appraisal
1211051232	miércoles, 1 de enero de 2020	7
1112030816	miércoles, 1 de enero de 2020	6
1001268402	miércoles, 1 de enero de 2020	10
1012023010	miércoles, 1 de enero de 2020	5
1101023839	miércoles, 1 de enero de 2020	7
1301052347	miércoles, 1 de enero de 2020	7
1101023619	miércoles, 1 de enero de 2020	6

```
1 Calendar_ = ADDCOLUMNS(  
2     CALENDAR (min(Salary[Date]),MAX(Salary[Date]) ),  
3     "Year", YEAR([Date]),  
4     "Month_num", MONTH([Date]),  
5     "Month", FORMAT([Date],"mmm"),  
6     "Week",WEEKNUM([Date]))
```



Power BI Desktop: DAX

KPIs to answer business questions

Explore



Structure

Formatting

Properties

Sort

Groups

Relationships

Calculations

1 Kind of purchase =

2 SWITCH(TRUE(),

3 Sales[SalesQuantity] < 20, "Retail",

4 "WholeSale")

Quantity

ReturnAmount

DiscountQuantity

DiscountAmount

TotalCost

SalesAmount

ETLLoadID

LoadDate

UpdateDate

Year

Kind of purchase

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2007

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2009

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2009

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2008

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2009

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2008

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2008

Retail

0

S/0

0

S/0

S/.3.214,4

6.990,00 €

1

01/01/2010 0:00:00

01/01/2010 0:00:00

2009

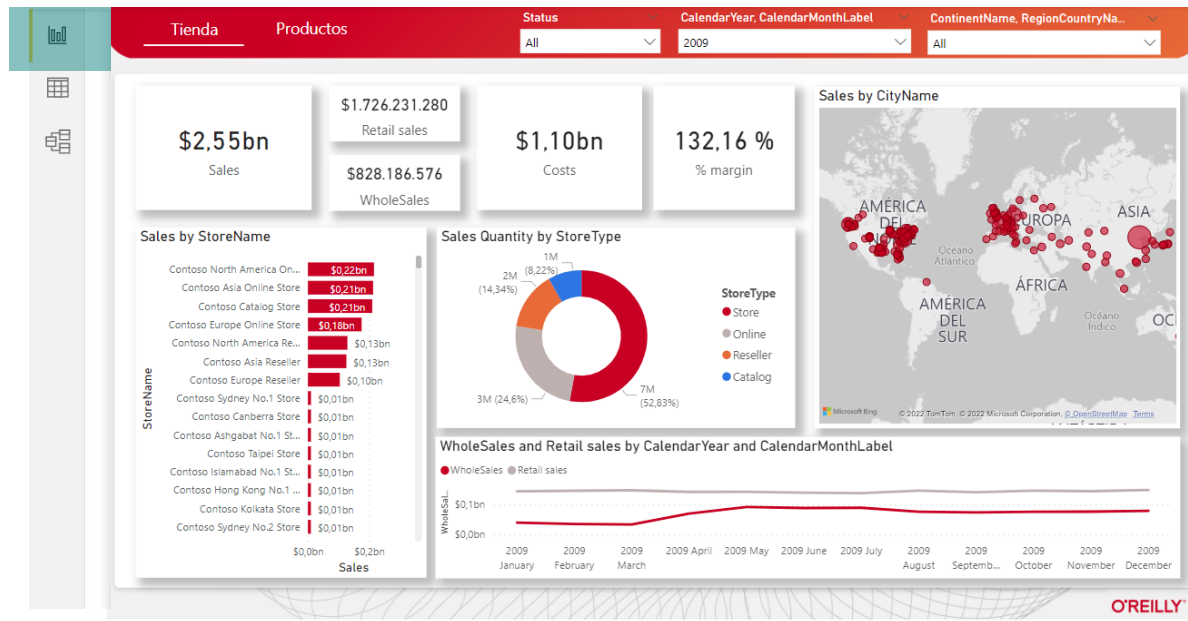
Retail



Power BI Desktop: Report

Create visuals for business users to understand their business

Visualize





Web Service Power BI

Share reports with colleagues

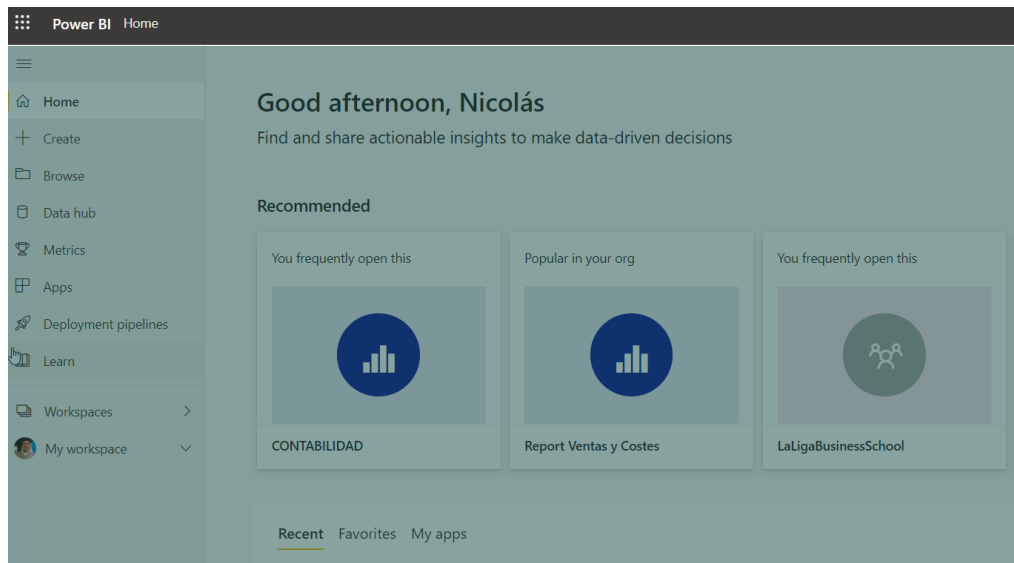
RSL



Automatic refresh

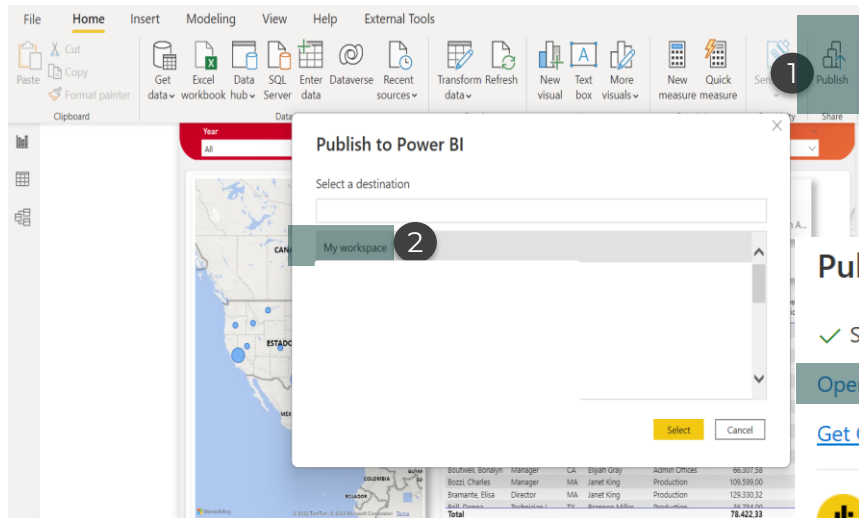


Share





Publish in Service of Power BI



Publishing to Power BI

✓ Success!

Open 'DEMO RRHH.pbix' in Power BI

[Get Quick Insights](#)



Did you know?

You can create a portrait view of your report, tailored for mobile phones. On the **View** tab, select **Mobile Layout**. [Learn more](#)

Got it



Schedule Refresh

 DEMO RRHH Report

 DEMO RRHH Dataset





Settings for DEMO RRHH

[View dataset](#)

[Refresh history](#)

Dataset description

Describe the contents of this dataset.

500 characters left

Apply

Discard

Gateway connection

Data source credentials

⊗ Failed to test the connection to your data source. Please retry your credentials. [Learn more](#)

SharePoint  [Edit credentials](#) [Share view](#)



Schedule Refresh

Configure DEMO RRHH

sharePointSiteUrl

Authentication method

Privacy level setting for this data source

3

Scheduled refresh

Keep your data up to date

Configure a data refresh schedule to import data from the data source into the dataset. [Learn more](#)

☒ On

Refresh frequency

Time zone

Time

[Add another time](#)

Send refresh failure notifications to

☒ Dataset owner

☐ These contacts:

Poll



In power BI Service we can schedule the refresh of the reports daily.

- ☐ True
- ☐ False



Q&A



- Write your questions in the chat so that we can answer and discuss them together.



About us:



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analytic mood

- **Co-founder of Analytic Mood** — Leading data solutions and business strategies.
- **Experienced Data Expert and Business Analyst** — Extensive experience with NTT Data, Kabel, BI Applications, Grupo Solutio and Analytic Mood.
- **Microsoft Power BI Lead** — Oversees the full development cycle from design to deployment.
- **Power BI Community Speaker** — Presented at the latest Power BI Summit, engaging with industry peers.



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analytic mood

- **Co-founder of Analytic Mood** — Pioneering data-driven solutions and strategic innovations.
- **Educational Background** — Holds a Master's degree in "Business Intelligence & Technological Innovation" from EAE Business School.
- **Consultant & Trainer in Microsoft Power BI** — Expert in guiding professionals through Power BI applications and analytics.
- **Power BI Community Contributor** — Recently spoke at the Power BI Summit, sharing expertise with fellow data enthusiasts.



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THANK YOU!