



# GAINING INSIGHTS WITH POWER BI

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SAINT LOUIS OFFICE 365 USER GROUP

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INFOWORKS, INC.

# AGENDA

- Introduction to Power BI
- Dashboards & Reports
- Administration
- Viewing & Sharing
- Your Data
- DAX



# DANIEL GLENN

Working @ [InfoWorksTN.com](http://InfoWorksTN.com)



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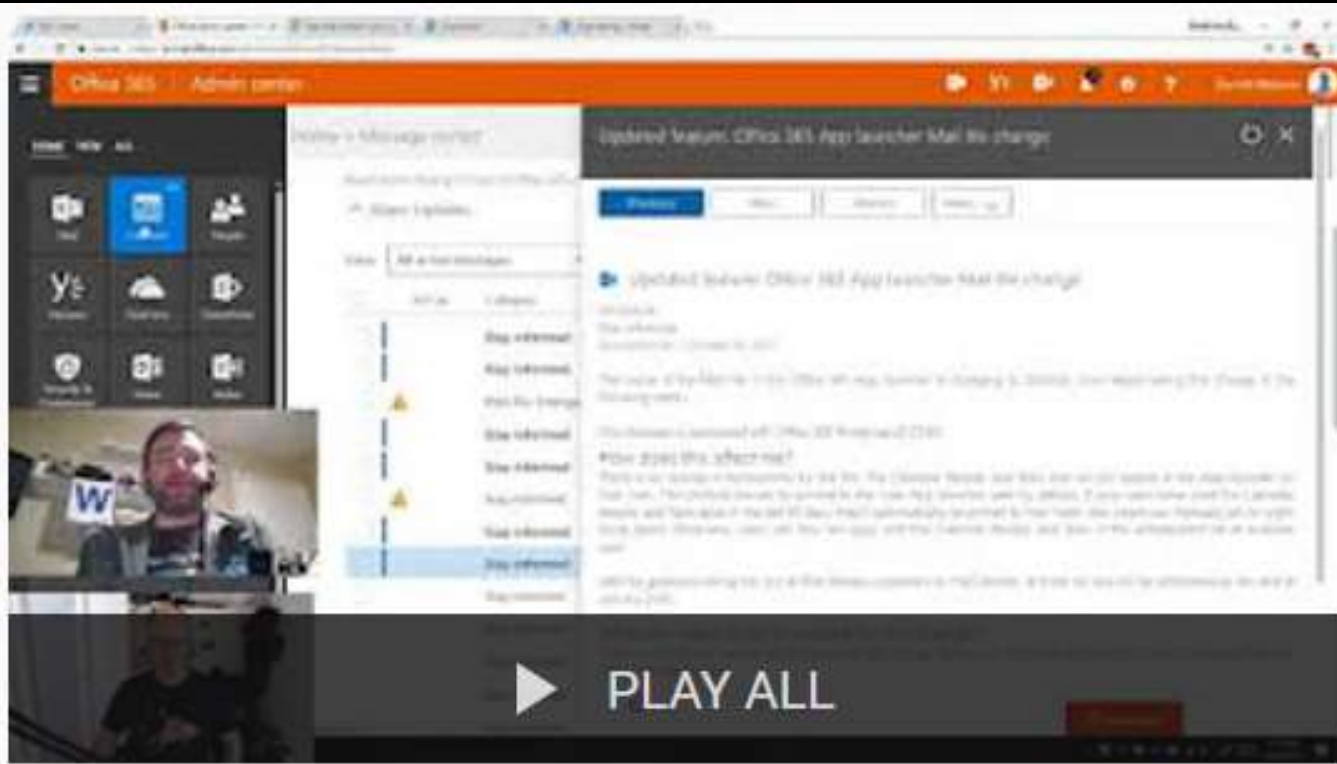
Co-host weekly show @  
[REgarding365.com](http://REgarding365.com)



[youtube.com/c/regarding365](https://youtube.com/c/regarding365)



@REgarding365



Live Show  
every Monday!

Office 365 Message Center: The  
week that was

Recordings and updates: [REgarding365.com](http://REgarding365.com)

# WHO IS INFOWORKS?



# WHO IS INFOWORKS?

- Agile solution provider in the Mid-South region
- Focused on helping our client partners achieve great things
- 100% Employee Owned
- Diverse expertise to deliver sustainable solutions
- Voted a Best Place to Work nine times



Who  
we are

# WHO IS INFOWORKS?



# WHO IS INFOWORKS?

- We work with companies of all shapes and sizes
  - Fortune 500 companies
  - Small and medium size organizations
  - Non profit organizations
  
- We work with a diverse set of industries
  - Financial Services
  - Healthcare
  - Higher Education
  - Manufacturing



Our  
Clients

# WHO IS INFOWORKS?



# WHO IS INFOWORKS?

Commitment to Clients, Culture, & Community

Our Firm





**WHAT IS POWER BI?**



# EXPERIENCE YOUR INSIGHT – ANY DATA, ANY WAY, ANYWHERE

## MICROSOFT CLOUD

Microsoft Azure  Office 365

 Microsoft Dynamics

Stream Analytics

## NON-MICROSOFT CLOUD

 Acumatica

 Marketo

 salesforce

 COMSCORE

 Intuit QuickBooks

 twilio



Analysis

## ON-PREMISE DATA

 Hadoop

 SAP

Microsoft SQL Server

ORACLE

TERADATA

IBM

Intelligent Apps



**5,000,000+**  
subscribers

**190+**  
countries

**200,000+**  
organizations



Datasets

Visualizations

Reports

Dashboards

Tiles

Datasets

Visualizations

Reports

Dashboards

Tiles

Power BI Service



Power BI Service

Power BI Desktop

Power BI APPS



# DASHBOARDS AND REPORTS





## WHY USE A DASHBOARD?

Transform business data into insights

Keep the organization focused

Tell your data story and be an influence

- Business-driven & updated often
- Use Key Performance Indicators
- Actionable



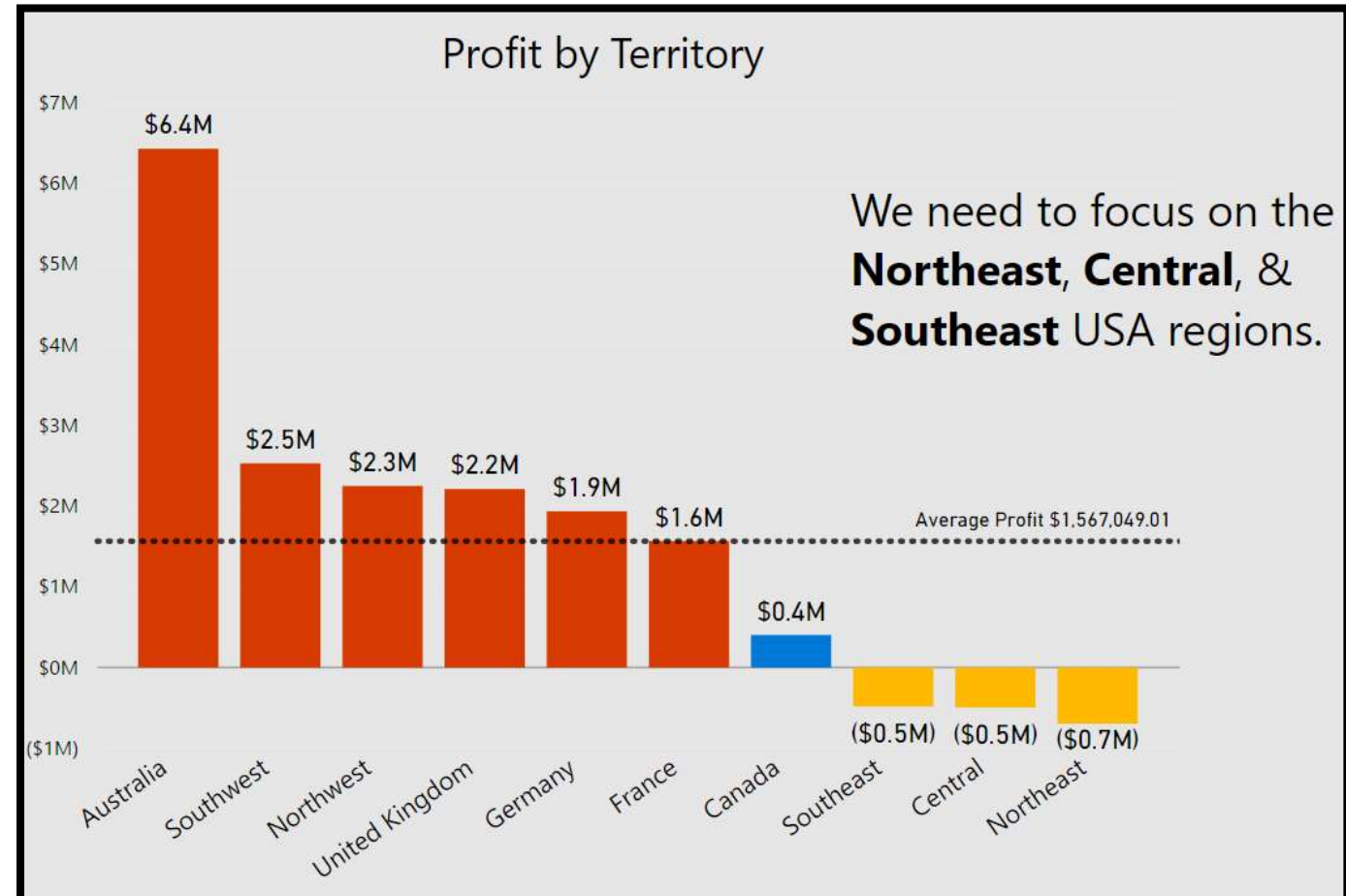
- Business-driven & updated often
- Use Key Performance Indicators
- Actionable



- Tell and show with labels, descriptions
- No thinking required for quick analysis
- Less is more
- Minimize distractions
  - Continuity
  - Symmetry
  - Proximity
  - Similarity



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## DASHBOARDS - MAIN TAKEAWAYS

### Tell a story

- Limit the number of points you are trying to make
- 3-5 charts on a page
- Present with text (connect points with commentary)
- Where should I start looking, what's next, where to end

### Call to action

Make it clear what decision should be made



# ADMINISTRATION



# ADMINISTRATION - DEMO

- Power BI Admin Portal
- Desktop rollout and updates



# VIEWING AND SHARING



# SHARING - DEMO

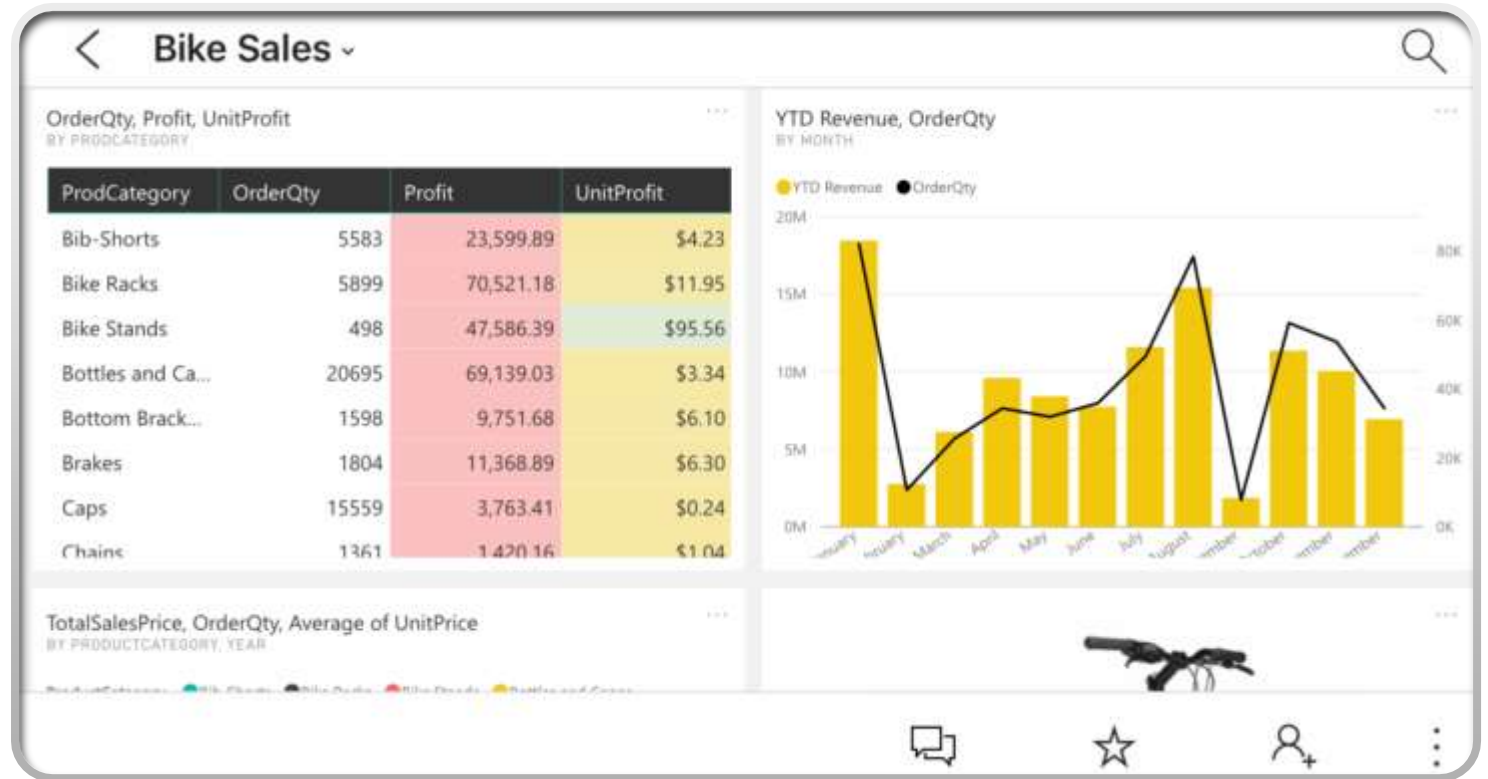
- Share dashboards
- Content packs
- Apps
- App Workspaces

## SHARING ON THE WEB

- Embedding reports (very rare)
- On SharePoint pages (you should do this!!)

# MOBILE VIEWING

- Power BI mobile apps
  - iOS
  - Android





# YOUR DATA



DATA

Working with data

## YOUR DATA

- You should study and know your data before you use it
- Many data sources are available to us
- \*If using on-premises data, a data gateway is needed to be installed on your network before you can share your reports, etc.

# EXPLORING DATA IMPORT OPTIONS

- Many options for getting data
  - Excel
  - SQL Server
  - Text
  - Web
  - Odata feeds
  - .....

# On-premises data gateway

One gateway for multiple cloud services and experiences

## Cloud services



### Gateway Cloud Service

- Encrypts and stores data source credentials and on-premises data gateway details
- Routes queries and results between cloud services, on-premises data gateway, and data source



### Azure Service Bus



### On-premises data gateway

- Decrypts data source credentials and connects to data source
- Sends queries to data source and returns the results to gateway cloud service

## On-premises data sources



# GATEWAY CONFIGURATION STEPS

Identify

Identify gateway server

Install

Install data gateway

Connect

Connect with Azure



# INTRO TO DAX



# INTRO TO DAX

- **DAX** stands for **Data Analysis Expressions**
- It is a functional language
- Two primary data types: Numeric and 'Other'
  - Numeric: integers, decimals, currency
  - Other: strings and binary objects
- Uses operator overloading
  - Mix data types in your calculations
  - Results will change based on the input data type
  - Happens automatically – could have negative consequences (KNOW YOUR DATA)

# DAX RESOURCES

- DAX Basics:  
[DanielGlenn.com/DAXBasics](https://DanielGlenn.com/DAXBasics)
- Video Course:  
[DanielGlenn.com/DAXvideos](https://DanielGlenn.com/DAXvideos)



QUESTIONS?





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