Gaining Insights with Power BI

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InfoWorks, Inc.

Agenda

- Introduction to Power BI
- What are Dashboards & Reports?
- Administration
- Viewing & Sharing
- Working With Your Data
- DAX

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Live Show
every Monday!

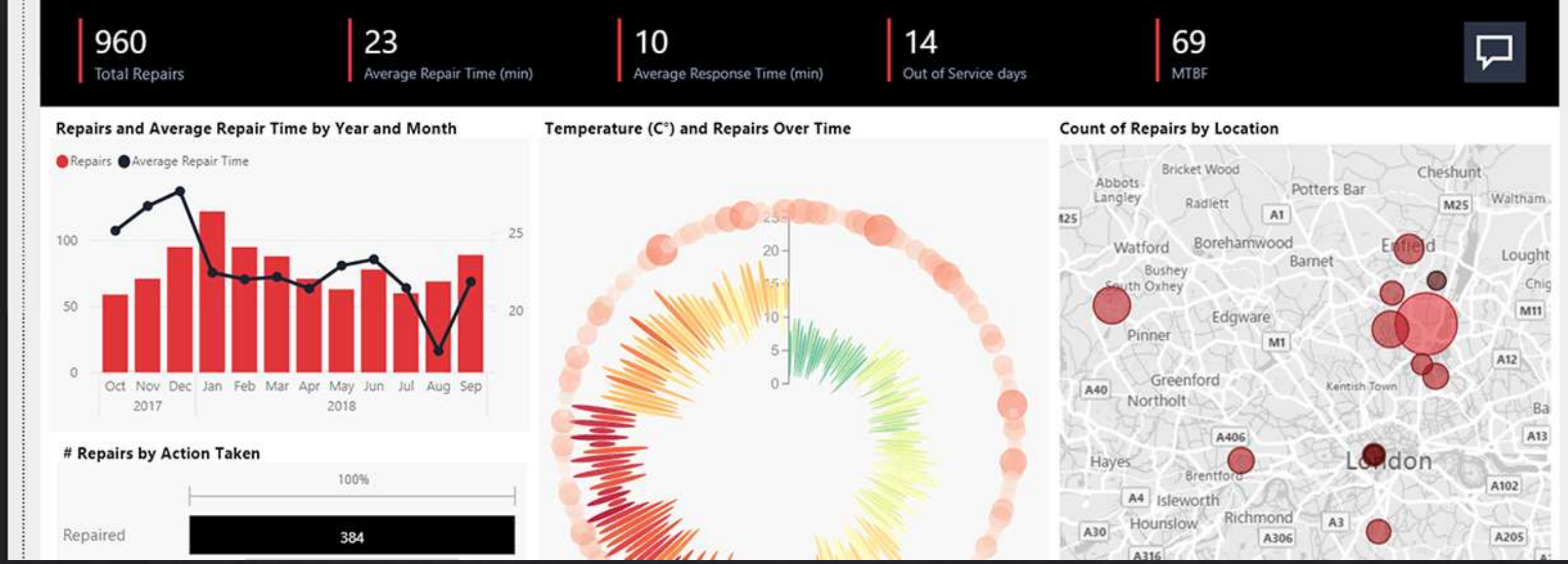
Recordings and get updates:
https://MessageCenter.Show

Who is InfoWorks?

Who is InfoWorks?

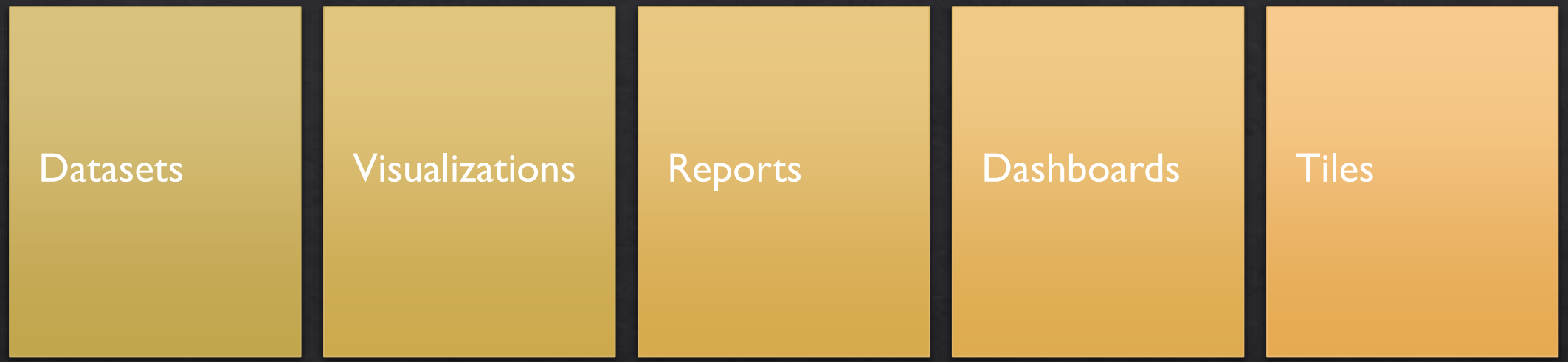
- Agile solution provider in the Mid-South region
- Focused on helping our client partners achieve great things
- 100% Employee Owned
- Diverse expertise to deliver sustainable solutions
- Voted a Best Place to Work nine times

Who we are

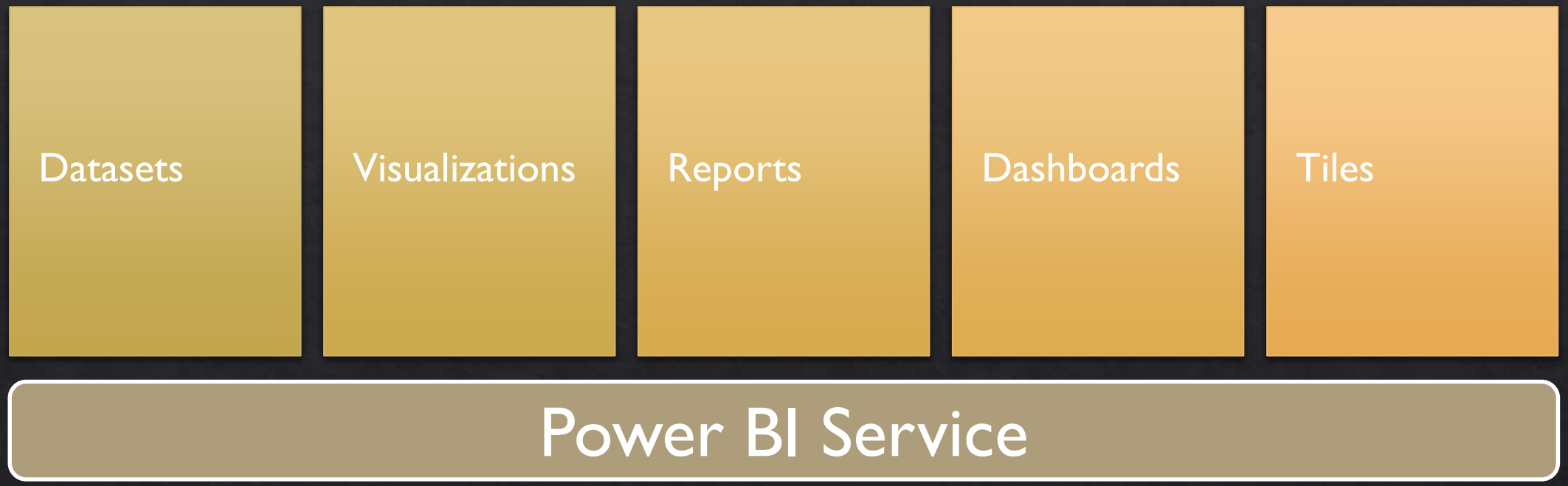


What is Power BI?

Experience Your Insight – any data, any way, anywhere



Power BI building blocks



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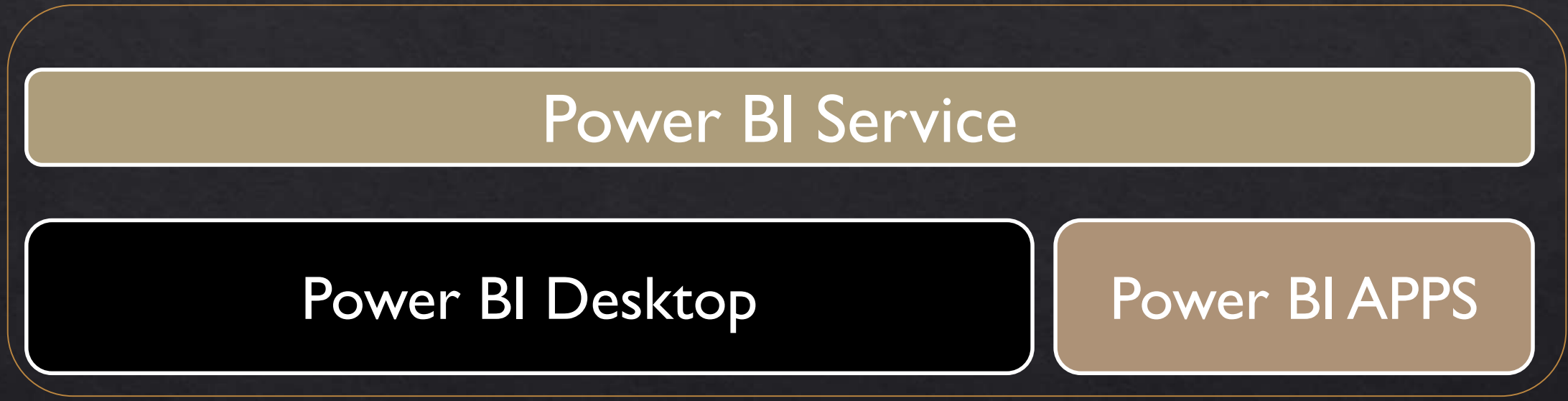


Power BI building blocks

Dashboards and Reports

Why use a dashboard?

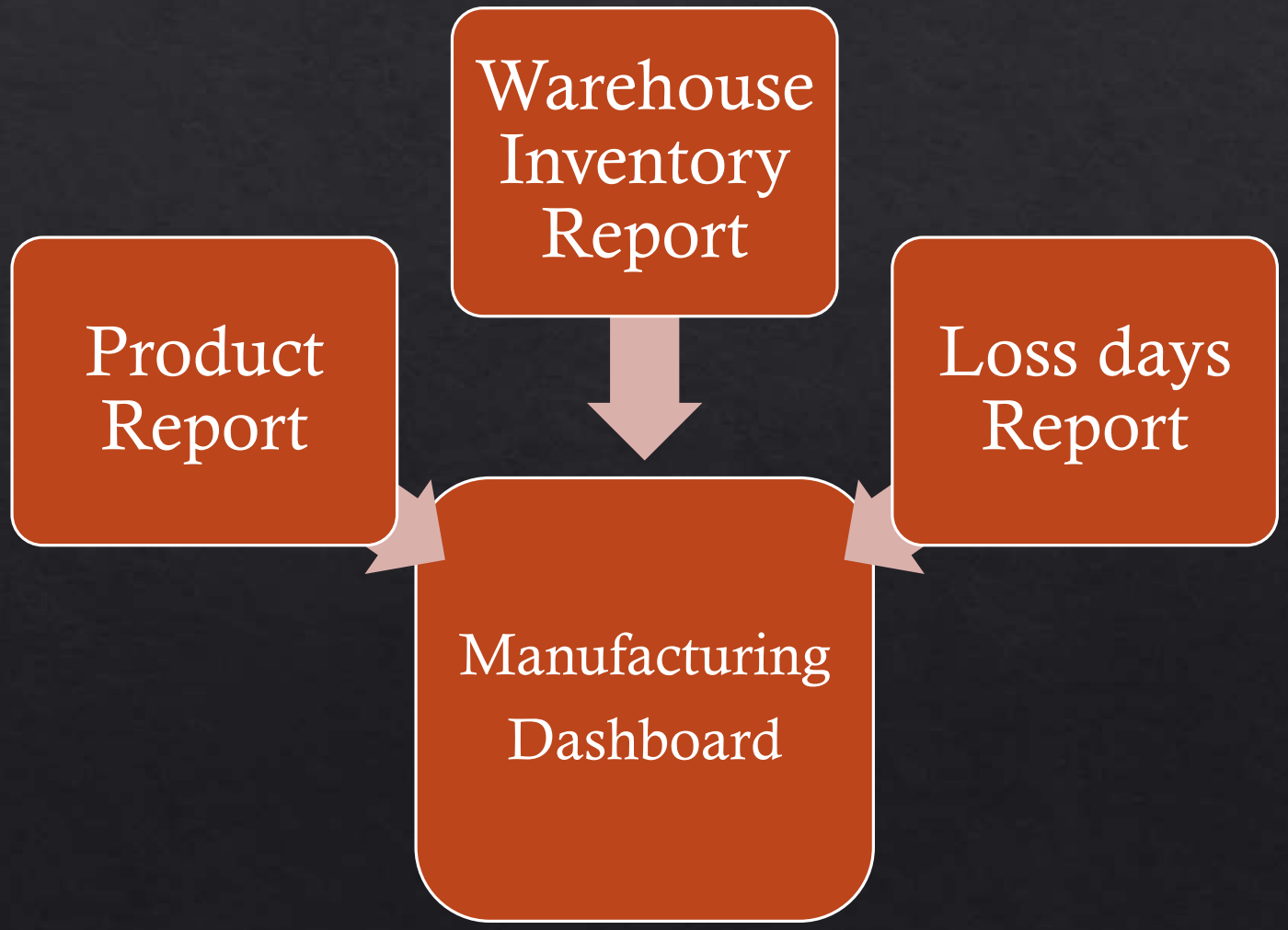
Transform business data into insights

Keep the organization focused

Tell your data story and be an influence

Make it compelling

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

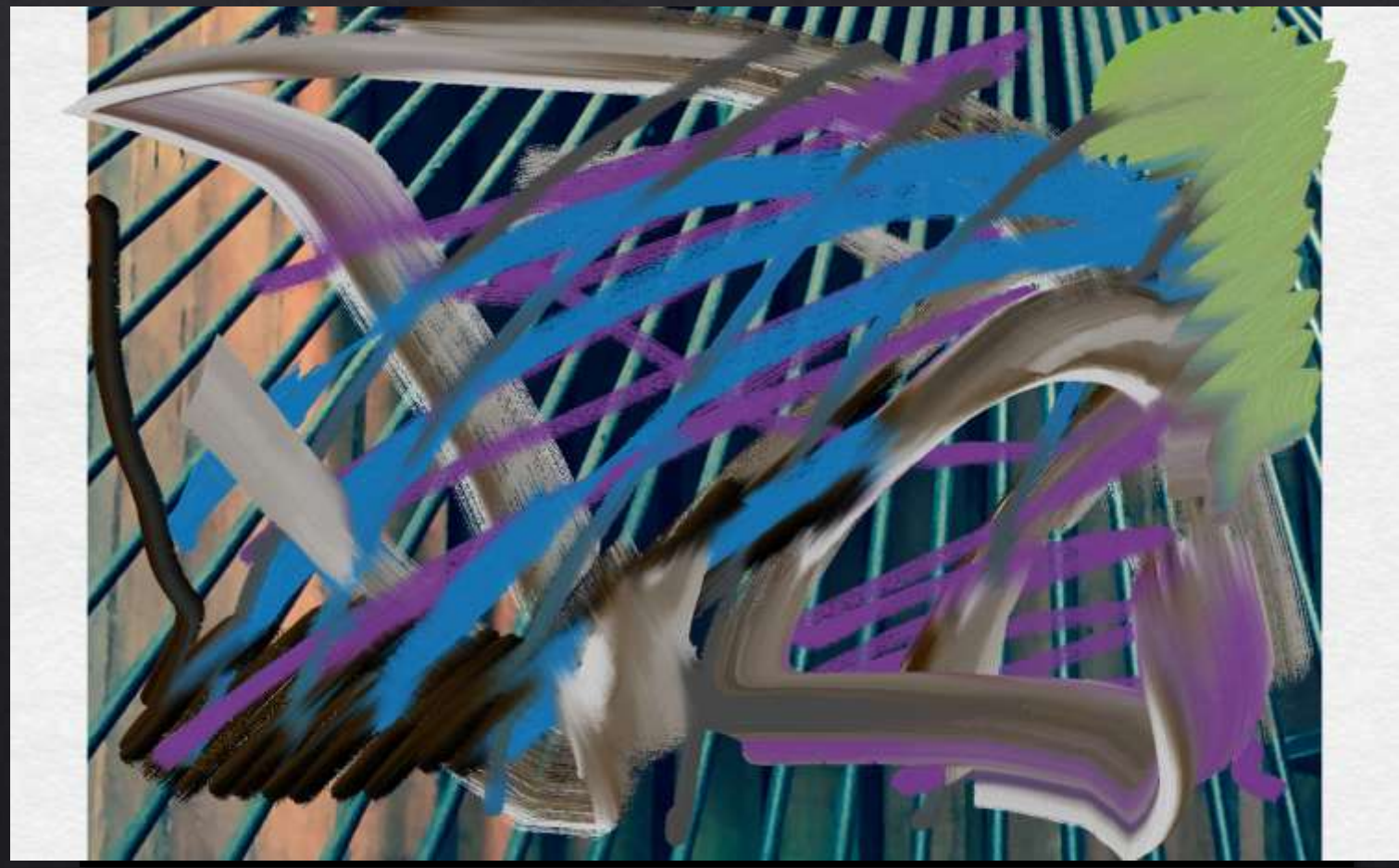


Make it compelling

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

Make it compelling

- 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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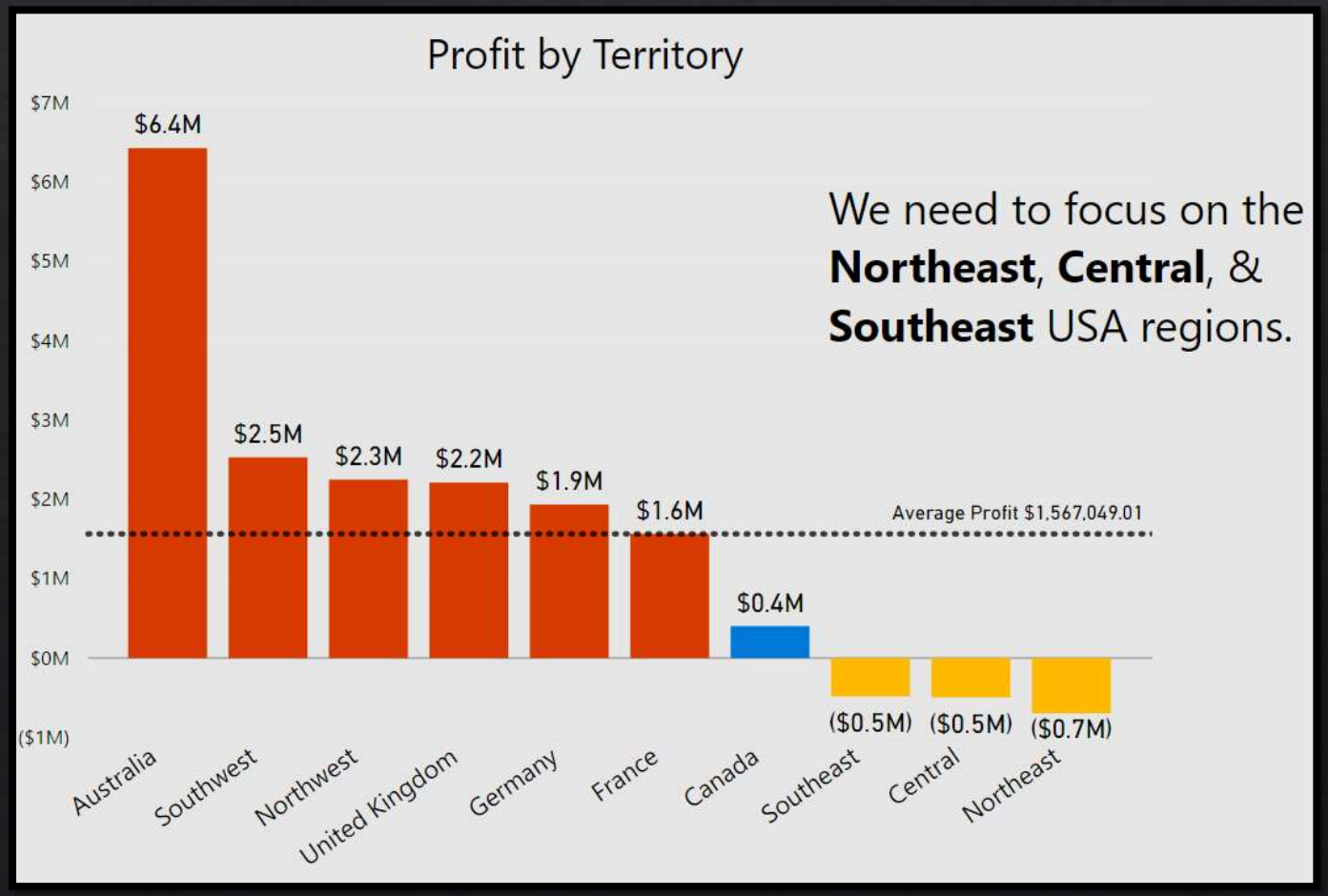

Dashboards - Main Takeaways

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

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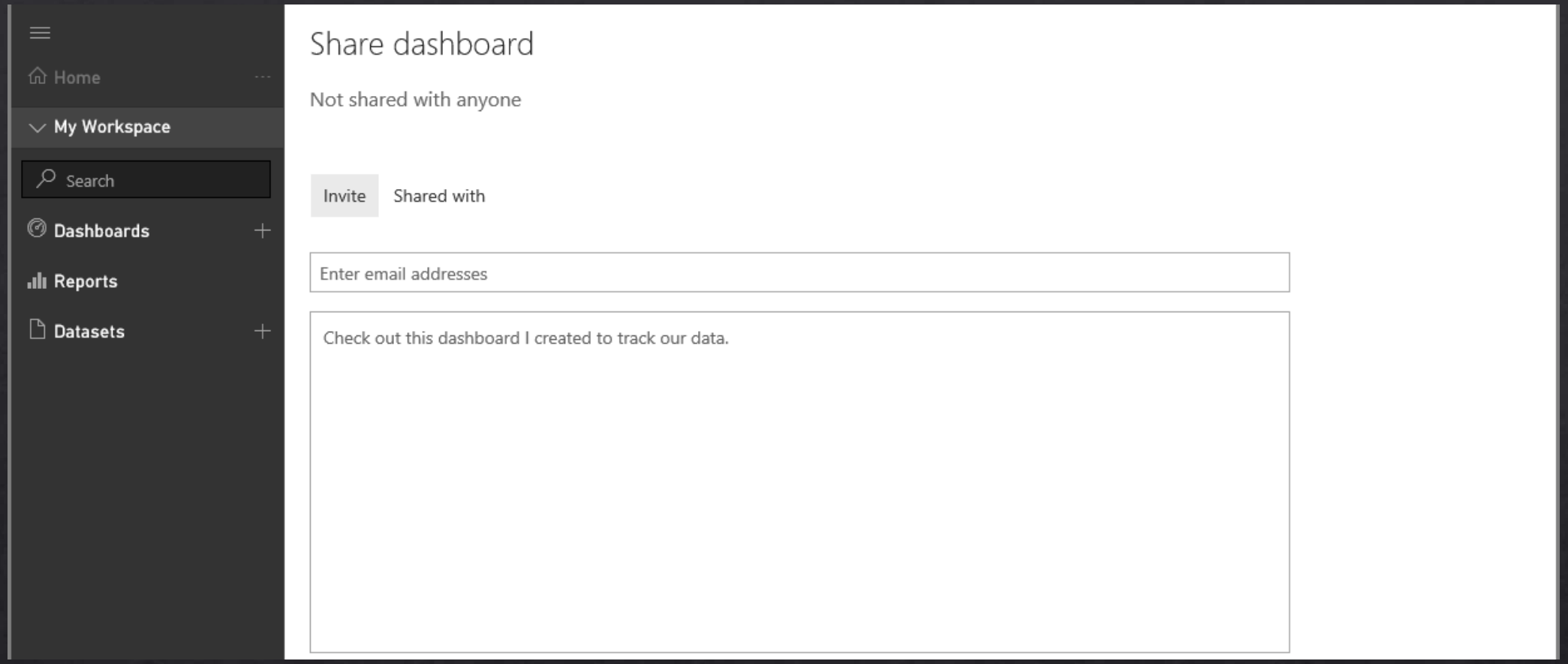
Administration

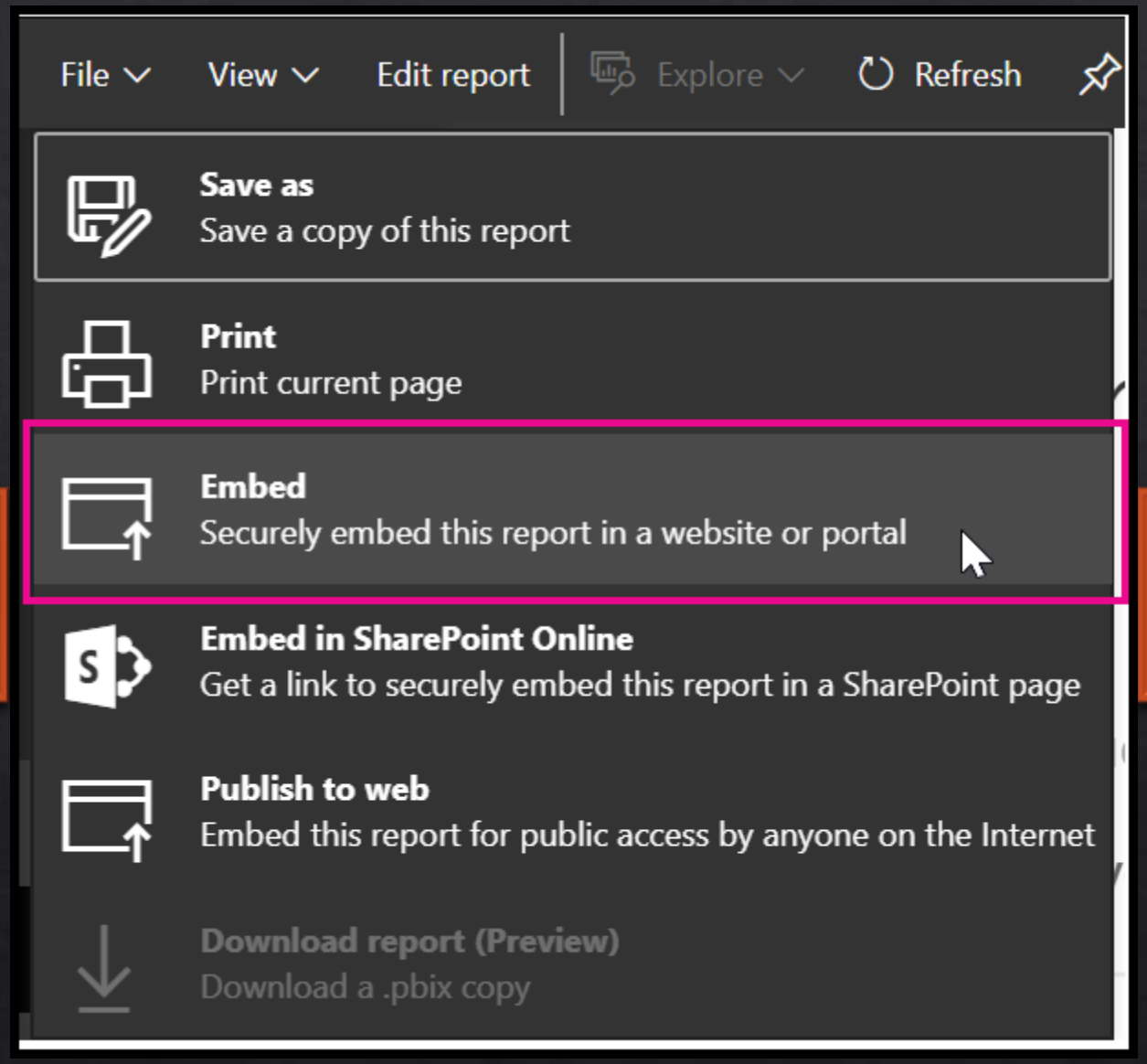
Power BI Admin Portal

Desktop rollout and updates



Viewing and Sharing

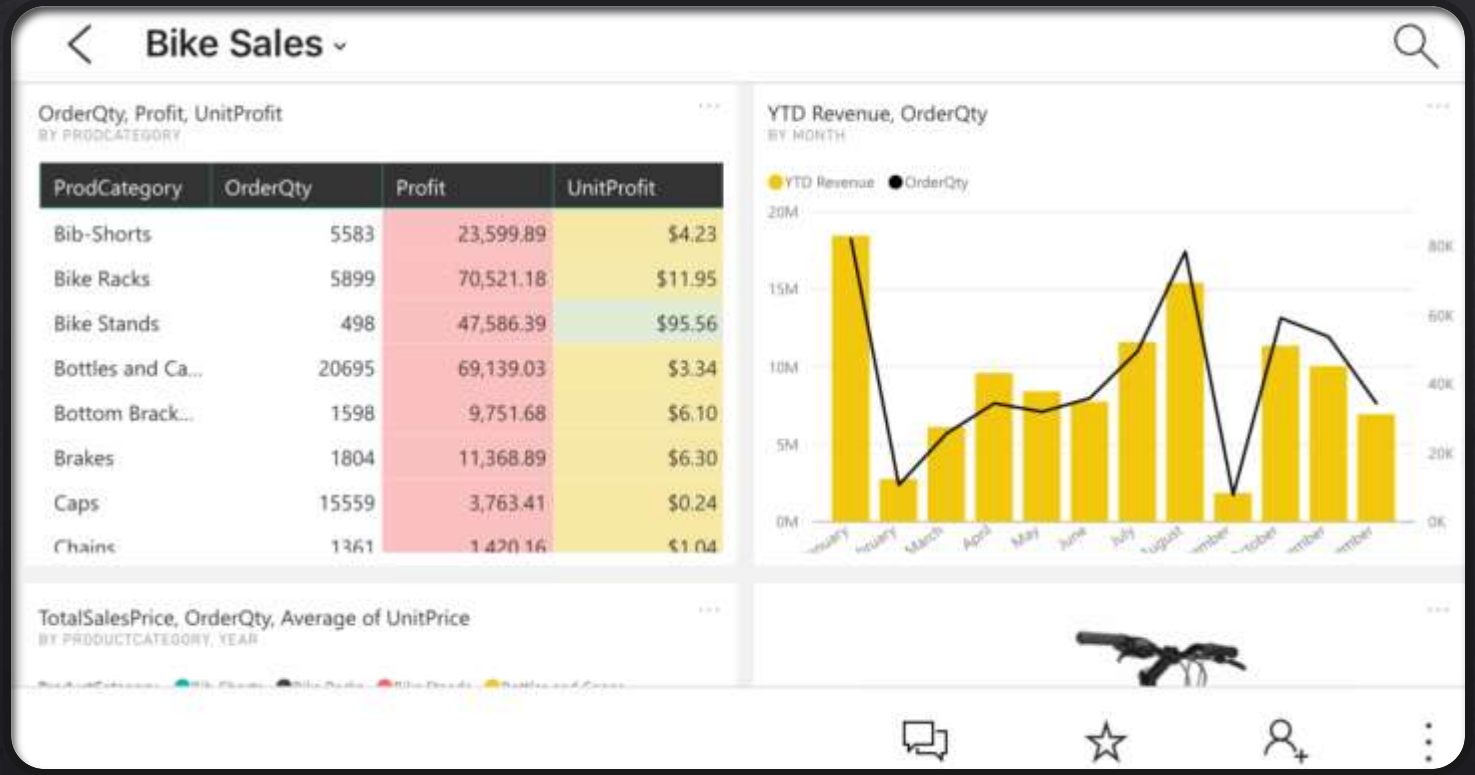
Embedding reports

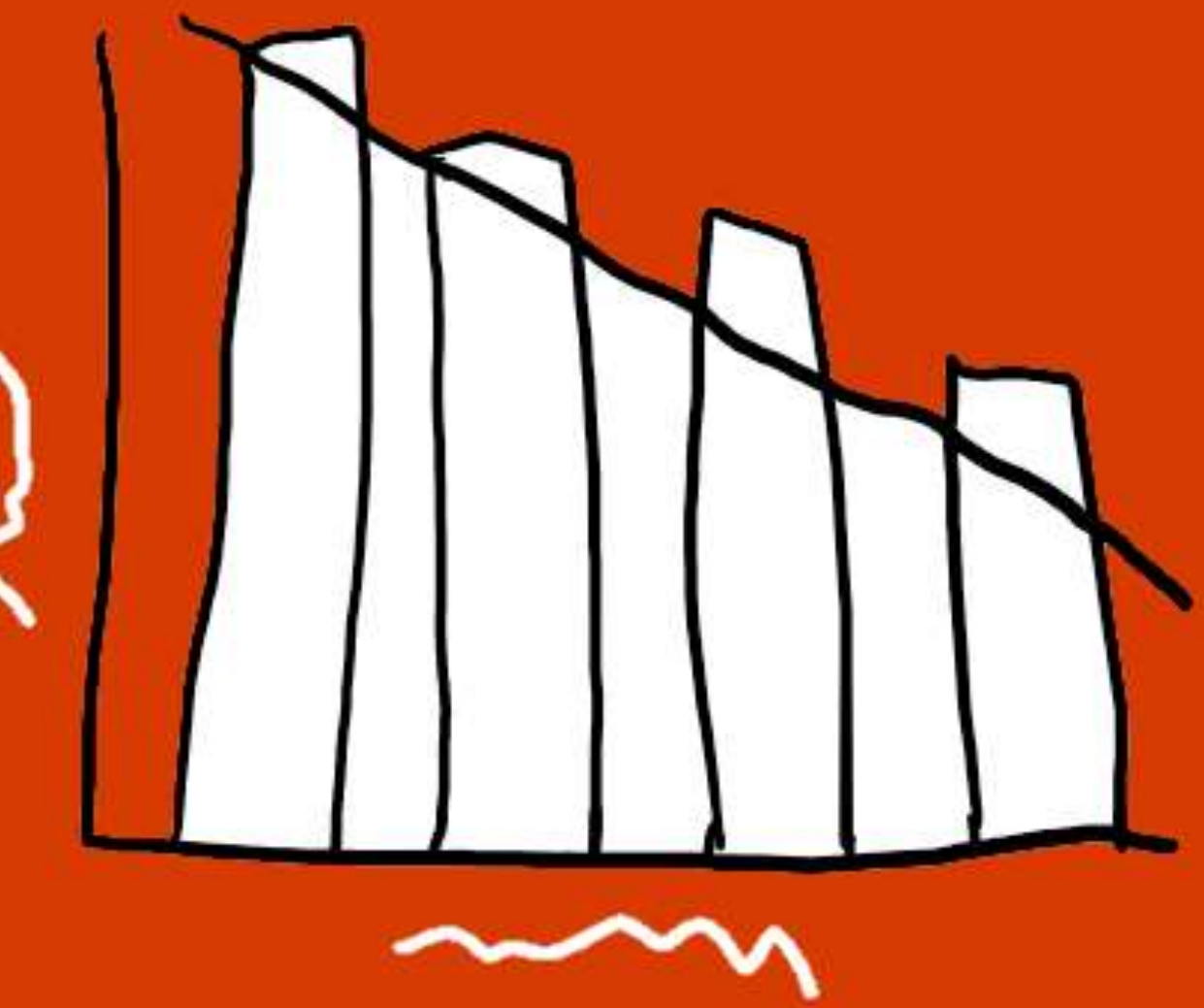


Private embedding

Mobile viewing

- Power BI mobile apps
  - iOS
  - Android





Working with Data

Your Data

- Study and know your data
- Data sources galore

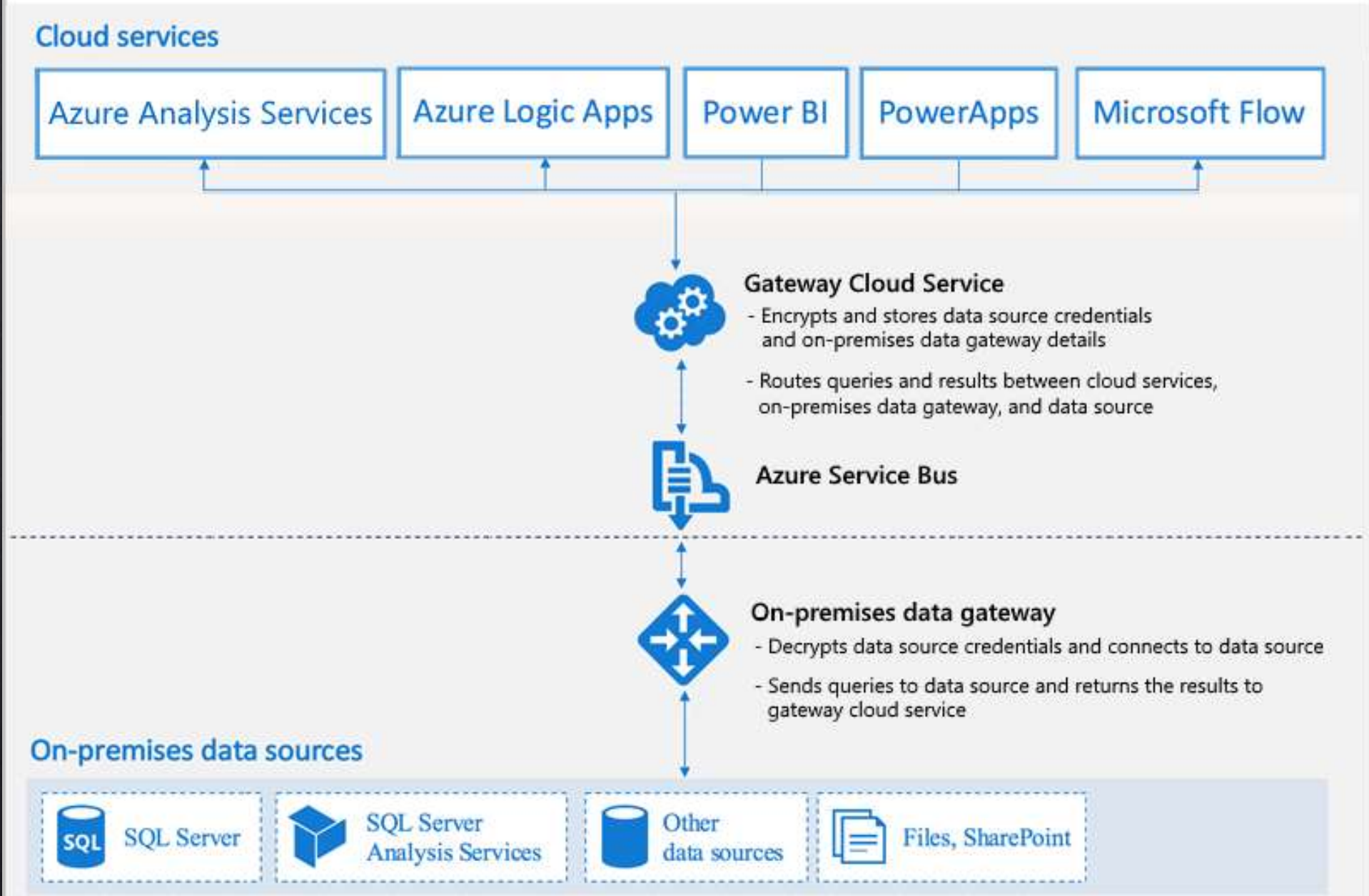
*If using on-premises data, a data gateway is needed to be installed on your network before you can share your reports, etc.

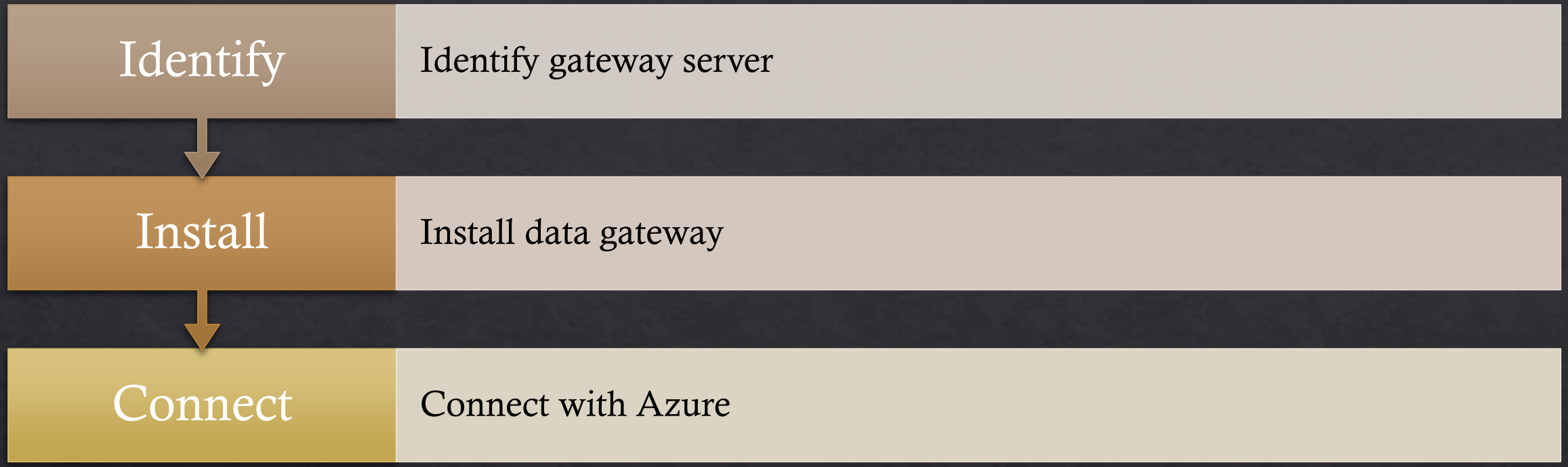
Exploring data import options

- Many options for getting data
  - Excel
  - SQL Server
  - Text
  - Web
  - Odata feeds
  - and more!

On-premises data gateway

One gateway for multiple cloud services and experiences





Gateway Configuration Steps

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/DAX Basics
- Video Course: DanielGlenn.com/DAX videos

Questions?

Resources

- Guy in a Cube - GuyInACube.com
- Podcasts: BiFocal Show
- InfoWorks, Inc. – contact me!
- Help in the app
- Docs on Microsoft.com

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