



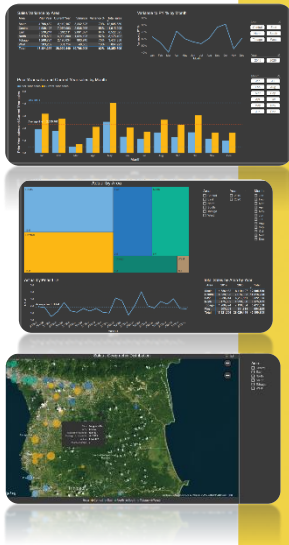
Areef Ali & Associates Business Solutions

Presents a 2 day, intensive, hands on training program

Microsoft Power BI: Secrets & Techniques in Dashboard Reporting Automation

Wed 21st & Thu 22nd October 2020

Facilitator: Mr. Areef Ali B.Sc, FCCA, CA, MBA



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3,200+ page
Power BI manual

Online or Classroom - Facilitator led sessions

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**Contact for inquiries, on-line private session specials:
Mr. Areef Ali at (868)-788-7538 or E-mail: admin@aaa-bsol.com**

For more details visit our website at www.aaa-bsol.com



Microsoft Power BI: Secrets & Techniques

Overview

If you are constantly pressured to get more reports, in less time with greater detail and more reporting interactivity then this course is an opportunity for you. Welcome to the world of Microsoft Power BI – the easier & faster way for you to build flexible, interactive and insightful reports to monitor performance and easily share them with others.

Learn how to use Microsoft Power BI to help you and your organization succeed. Expand your skills & get yourself ahead. This is your opportunity to become a self-service BI analyst. Connect and join data from the web, excel files, databases, text files etc and produce outstanding reports in minutes – without any programming skills.

Seminar Format / Presentation approach

This is a practical and highly interactive seminar with a mix of tutoring using examples, hands on exercises for each technique learnt, combination exercises and Q&As.

Who will benefit?

Anyone wanting to get ahead by learning the latest techniques in creating effective reports for performance management will benefit from this training program. Accounting and Finance, HR, Marketing, IT, Business Analysts, Audit and Operations staff can all benefit.

Participant Prerequisites

- You should have a basic knowledge of Excel, how to set formulas, tables and how to create basic graphs and charts
- Have basic experience in preparing management reports

What are your Key learning points & benefits?

- **Develop** your core technical skills to succeed at automating and creating beautiful / insightful reports
- **Learn** the newest techniques & thinking in cleansing & transforming data, building data models, selecting visuals for reports, creating filters, slicers, sensitivity and scenario analyses and building drill downs in reports
- **Increase** your work productivity & reduce errors. Save many hours of time. The techniques you learn can reduce the time you take to create reports from hours to minutes. Spend more time on review and analysis activities
- **Receive** a flashdrive with all practice exercise training materials & solutions.
- **Receive** a comprehensive 3,200-page pdf manual on Power BI
- **Claim** CPD hrs and a certificate for your attendance at this seminar
- **Leverage** this opportunity to get trained from the safety / comfort of your home / office

You **MUST** walk with a Windows based laptop with **Power BI Desktop 64 bit** version installed ([free Microsoft install here](#)) or contact us if you need a low-price rental laptop arranged.

Seminar Pricing

Online version, the price is TT\$2,800 + VAT = \$3,150 total.

Classroom version, the price is TT\$3,500 + VAT = \$3,937.50 total.

Contact us at excelsem@aaa-bsol.com or 868-788-7538 if you would like a customized in-house session done in this programme.



Microsoft Power BI: Secrets & Techniques in Dashboard Reporting Automation

Wed 21st October 2020 Day 1, 8:30am - 4:15pm

Course Outline

	Timing
Power BI Overview	8:30am-10am
Break	10:00am - 10:15am
Getting & manipulating data - Practical exercises	10:16am to 12:00pm
Getting started with Power BI Desktop	
Connect to data sources in Power BI Desktop	
Clean and transform your data with the Query Editor	
More advanced data sources and transformations using the query editor - practical examples	
Performing merge and append routines	
Cleaning irregularly formatted data in Power BI Desktop - an exercise	
Break	12:00pm - 1:00pm
Getting data - Practical exercises cont'd	1:00pm - 1:45pm
Connecting and interrogating an Access database using Power BI	1:45pm - 2:45pm
Review imported relationships	
Determine if any manual relationships need to be setup	
Break	2:45pm - 3:00pm
Creating Visualizations	3:00pm- 4:15pm
Introduction to visuals in Power BI	
Create and customize visualizations - a practical exercise using the Contoso Access Database from before lunch	
Modify colors in charts and visuals	
Shapes, text boxes, and images	
Page layout and formatting	
Group interactions among visualizations	
Summarization and category options	
Z-order	
Visual hierarchies, drill-down, filtering & slicing	



Microsoft Power BI: Secrets & Techniques in Dashboard Reporting Automation

Thu 22nd October 2020 Day 2, 8:30am - 4:15pm

Course Outline

	Timing
Case exercise on Building a Reporting model using Power BI Desktop	8:30am - 3:00pm
Applying the techniques learnt from Day 1 along with new tips, tricks & techniques to create business monitoring reports Includes: Getting data from multiple sources Performing data cleansing / transformation routines Building an automated calander table Creating Data Table relationships Editing your data relationships Table relationships and DAX Create calculated columns & measures - DAX Optimizing the data model Explore your time-based data DAX tables and filtering Including filters / slicers in the report Include a time hierachy for drill down in report Using Query & Report Parameters to limit data shown Creating bookmarks in Reports for easy insights review Publishing report to the Power BI service	
Break	12:00pm - 1:00pm
Power BI Service Insights in Power BI Configuring a dashboard Create custom Q&A suggestions Share dashboards with your organization Edit tile details and add widgets Get more space on your dashboard	3:00pm - 4:15pm
Power BI service Import / Export Upload Excel data to Power BI Import Power View and Power Pivot to Power BI Excel in Power BI - summary Publish to Power Point & the web	



Facilitator Profile - Mr. Areef Ali

Areef Ali is the principal consultant at Areef Ali and Associates Business Solutions (AABS). He holds a B.Sc. in Industrial Management, an FCCA designation from the ACCA and a Herriot Watt University MBA. He is a member of both the accounting and human resource management bodies in Trinidad and Tobago.

He has attended advanced programs in Manhattan, New York in the operation of financial markets and also in corporate valuations. He is Microsoft certified in MS Excel Data Analysis and also Power BI. He has over twenty four (24) years of work experience in the Finance, training & business consulting fields, including three and a half years at Price Waterhouse where he was a member of the Audit and Business Advisory Services Group.

Areef served as a finance professional at the Methanol complex. Subsequently, he was appointed the Chief Accountant and then the Corporate Finance Head at a leading financial institution. In June 2006 Areef, started AAABS.

In-house Excel, Management reporting, Auditing, Dashboarding & Financial Modelling training

Areef and his associate facilitators have completed sessions for many clients including a major business school, the Institute of Internal Auditors, conglomerates, businesses in the energy, construction, telecom, retail & distribution, financial sectors and major audit firms.

Projects completed

- Design, and implementation support for core business application systems for conglomerate clients
- Management reporting, KPI / dashboard automation- Telecom, Energy and Oil sector clients
- Measurement spec, ordering and contract generation system development - construction client
- Project financing evaluation review reporting
- Business planning and modelling design for strategy management - financial services, energy, telecom sector organizations, recycling plant development & export business
- Risk Management reporting automation - Large financial institution
- Compliance monitoring & tracking automation - Regulatory authority
- Bill of materials forecasting automation – Pharmaceutical company

Public Seminar delivery

AABS has delivered a number of public training seminars in Basic, Intermediate & Advanced Excel, Audit & Fraud, Power Forecasting, Financial modelling Charting and Graphing, Pivot Table Reporting and Designing Dashboards

Public Hosted Seminars

AABS has hosted many public seminars with world renowned experts in the fields of Advanced Excel, Management reporting, Marketing, Presentation techniques, Negotiation, Audit and Fraud examination

In June 2017 AABS launched the “Areef Ali & Associates Success Centre”. Our aim is to help organisations & individuals achieve success. Areef makes the Centre available to the public for training, meeting room and other event rentals.