



*Presents a 2-day, intensive, hands-on training program.*

**Wed 13<sup>th</sup> & Thu 14<sup>th</sup> May 2026**

## **Power BI Secrets & Techniques in Dashboard Reporting Automation**

Get the newest tips, tricks & techniques to stay ahead!  
All training is instructor led

Attend virtually or contact us for a private face-to-face (F2F) session for your team

### **Facilitator**

Areef Ali BSc, FCCA, CA, MBA, MCT

*F2F sessions are held at our office: 66 Kolahal Road, Charlieville, Chaguanas*

### **Contact for inquiries or private group training sessions:**

Mr. Areef Ali

(868)-788-7538

[admin@aaa-bsol.com](mailto:admin@aaa-bsol.com)



[\*\*Click here to register\*\*](#)



# What participants say after attending our Training sessions...

"Areef was an excellent facilitator. Made everything simple, was willing to repeat steps and processes. Gave a lot of practical examples and encouraged us to speak about or bring to him our own practical examples and advised what can be done to improve same" VS

"Excellent all round...." DH

"Once again Areef has delivered a wonderful course that meets the demands of today's business world. Concise, relevant & powerful..." AB

"Astonishing and Empowering..." WW

"Great seminar. Excellent facilitator. Generally, a very informative course" AA

"Excellent seminar. Facilitator is extremely knowledgeable great teaching application etc" KH

"Both seminar + facilitator were excellent!" SR

"Great facilitator Great seminar I strongly recommend" RV

"This course is the best course I have attended." MT-G

"Exceeded my expectations re the level of time savings and smart short cut tools shown. Extremely value adding..." DL

"The sessions were well taught and delivered to expose us to the range of possibilities of Excel. A job well done! Thanks" DC

"Exceptional & Dynamic course everyone should do." KL

"Mr. Ali is very knowledgeable in this field.... This session will certainly assist me with my daily work. I highly recommend people to take the time and money and invest in this course. It is worth it." AAA

"The seminar was intensive but well planned. The facilitator was very knowledgeable and aimed to give realistic applications to the techniques taught." JH

"I was impressed within the first 10 minutes of the programme.... Overall, I thoroughly enjoyed this course, didn't know Excel was so powerful." NA

"Course was excellent, well planned and properly delivered, esp. for myself having some fairly good experience with excel and its functionalities..." VR

"I must say I was very impressed with Mr. Ali's presentation style. It was an apt mix of professionalism and a unique spin on Excel techniques. The case study was very interesting; pulling on a myriad of knowledge acquired throughout the sessions" J-MG

"Facilitator is very knowledgeable and explains content brilliantly so that I could understand" KP-G

"Seminar - an excellent opportunity to improve one's knowledge for personal and professional effectiveness and creativity. Facilitator makes the learning process very easy despite the complexity of the topic units" CP

"Excellent all round..." DH

\*Attendee feedback form comments were used with approval. Participant initials are shown at the end of comment



# Power BI Secrets & Techniques in Dashboard Reporting Automation

## 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.

## Session Format / Facilitation 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?

Persons interested in creating effective reports for performance management, Accounting & 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, create basic graphs and charts, along with basic experience in preparing management reports.

*Participants MUST have a Windows based laptop with the 64-bit version of Power BI Desktop (Free or Pro Edition) installed.*

*([download link to Power BI Free Edition](#)).*

*Contact us to request a low-priced laptop rental for class.*



# Power BI Secrets & Techniques in Dashboard Reporting Automation

## What are your Key learning points & benefits?

- **Develop core technical skills** to succeed at automating and creating visually captivating and 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 work productivity, reduce errors, and save time** -the techniques will reduce time spent creating reports, allowing you to focus more on review & analysis activities.
- **Receive your companion material** - all practice exercise training materials & solutions along with a comprehensive softcopy guide on Power BI will be given to participants
- **Claim CPD hrs.** and a certificate for your attendance at this seminar.

## Seminar Pricing (\$ TTD)

	<b>Attending Online</b> Virtual classroom options and pricing	
<b>TT\$2,800 + VAT = \$3,150</b>		

	<b>Attending Classroom</b> Classroom options and pricing	
<b>TT\$3,500 + VAT = \$3,937.50</b>		

**Classroom seating is limited so book early to secure your space.**

Please do not hesitate to contact us if you would prefer a private virtual session or F2F inhouse session for your team.



# Power BI Secrets & Techniques in Dashboard Reporting Automation

Day 1

8:30am – 4:00pm

Wednesday 13<sup>th</sup> May, 2026

## Outline

Time	Course Topics
8:30 am- 10:00 am	<b>Overview of Power BI</b>
10:00am- 10:15am	Breaktime
10:15am- 12:00pm	<b>Getting &amp; manipulating data - Practical exercises</b> <ul style="list-style-type: none"> <li>• Connect to data sources in Power BI Desktop</li> <li>• Data quality checking techniques in the Query editor module</li> <li>• Cleansing &amp; transformation of your data with the Query Editor</li> <li>• Merge and append data from multiple sheets and files</li> <li>• Perform fuzzy lookup matches, automate calculations</li> <li>• Practical examples - more advanced data transformations using the query editor – multi level data header issues</li> <li>• Grouping / bucketing data in Power Query</li> <li>• Cleansing techniques - irregularly formatted data</li> </ul>
12:00 pm- 1:00pm	Lunch Break
1:00pm - 1:45pm	Getting data - Practical exercises cont'd
1:45pm - 2:45pm	<b>Connecting &amp; interrogating database</b> <ul style="list-style-type: none"> <li>▪ Review imported relationships, Determine manual relationships</li> <li>▪ Optimising data load &amp; building sliceable reports</li> </ul>
2:45pm - 3:00pm	Breaktime
3:00pm- 4:00pm	<b>Creating Visualizations</b> <ul style="list-style-type: none"> <li>▪ Introduction to Power BI visuals</li> <li>▪ Create &amp; customize visualizations - a practical exercise, again using the Contoso Access Database</li> <li>▪ Modify colors in charts &amp; visuals</li> <li>▪ Shapes, text boxes, and images</li> <li>▪ Page layout and formatting</li> <li>▪ Group interactions among visualizations</li> <li>▪ Summarization and category options</li> <li>▪ Visual hierarchies, drill-down, filtering &amp; slicing</li> </ul>



# Power BI Secrets & Techniques in Dashboard Reporting Automation

Day 2

8:30am – 4:00pm

Thursday 14<sup>th</sup> May, 2026

## Outline

Time	Course Topics
15 minute breaks in morning and afternoon sessions	
8:30 am- 3:00 pm	<p>Detailed case exercise to build a full scope relational reporting model in Power BI. Recap &amp; apply the Day 1 techniques alongside new tips, tricks &amp; techniques to create business monitoring reports</p> <ul style="list-style-type: none"> <li>▪ Get data from multiple sources</li> <li>▪ Perform data cleansing / transformation routines</li> <li>▪ Build automated calendar tables</li> <li>▪ Create Data Table relationships</li> <li>▪ Edit your data relationships</li> <li>▪ Table relationships and DAX</li> <li>▪ Create calculated columns &amp; measures - DAX</li> <li>▪ Optimize your data model to speed up running reports</li> </ul> <ul style="list-style-type: none"> <li>▪ Automating your date calendar for time period analysis</li> <li>▪ Virtual query tables and filtering</li> <li>▪ Include filters / slicers in the report</li> <li>▪ Include a time hierarchy for drill down in report</li> <li>▪ Create bookmarks in Reports for easy insights review</li> <li>▪ Publish report to Power BI service</li> </ul>
12:00pm- 1:00pm	Lunch Break
3:00pm- 4:15pm	<p style="text-align: center;">The Power BI Service</p> <ul style="list-style-type: none"> <li>▪ Insights in Power BI service</li> <li>▪ Configuring a dashboard</li> <li>▪ Create custom Q&amp;A suggestions</li> <li>▪ Share dashboards with your organization</li> <li>▪ Edit tile details and add widgets</li> </ul> <ul style="list-style-type: none"> <li>▪ Get more space on your dashboard</li> <li>▪ Power BI service Import / Export</li> <li>▪ Upload Excel data to Power BI</li> <li>▪ Import Power View and Power Pivot reports to Power BI</li> <li>▪ Excel in Power BI - summary</li> <li>▪ Publish to Power Point &amp; the web</li> </ul>

## **Areef Ali & Associates Trainer Profile**

### **Areef Ali B.Sc., MBA, FCCA, CA, MCT**

Areef has over thirty (30) 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 to pursue his passion for training and people development.

### **In-house & Public MS Excel & Power BI work**

AAABS has completed in-house training and consulting projects for diverse teams in MS Excel work productivity and automation techniques, Power BI, Management and Dashboard reporting automation. Our clients have included numerous organisations, both private and public sector, locally and internationally.

### **Other MS Office Training**

We also facilitate private training in Word, Power Point, SharePoint, Teams and Outlook based on your requirements