Areef Ali & Associates
Business Solutions

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

Wed 17th & Thu 18th March 2027

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

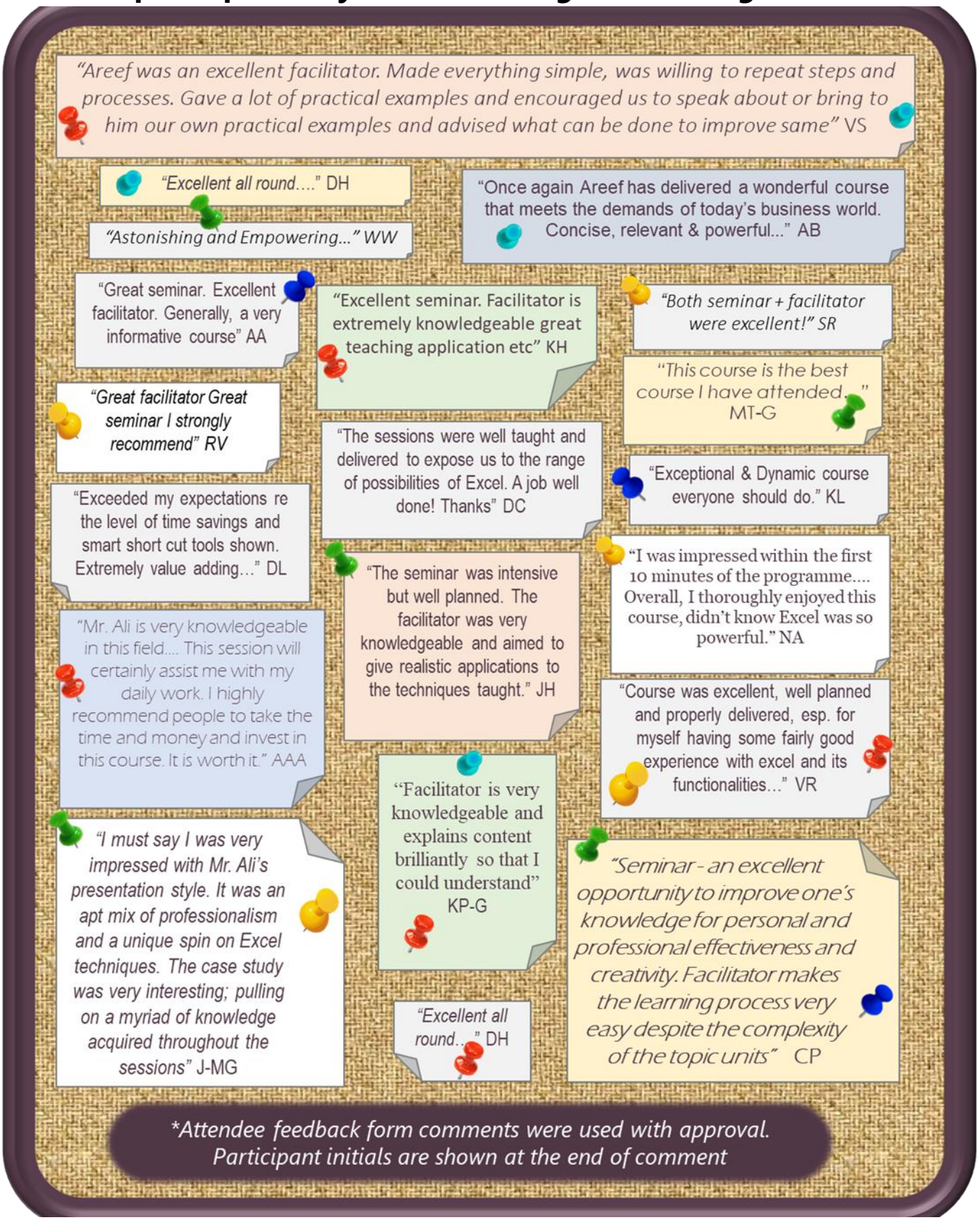
Facilitator

Areef Ali BSc, FCCA, CA, MBA, MCT
Shakeel Hosein B.Sc., M.Sc., 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

What participants say after attending our Training sessions…



Contact us at ***admin@aaa-bsol.com*** *or* ***868-788-7538*** *to arrange custom sessions*

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 with audit trail 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. Data mine and connect to sources from the web, multiple 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 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.

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What are your key learning points & benefits?

• ***Develop core technical skills*** *to succeed at automating and creating visually captivating and insightful reports with audit trail.*

•***Learn the newest techniques & thinking*** *in mining data, 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

Attending Online Virtual classroom options and pricing
TTD $2,800 + VAT

Attending Classroom* Classroom options and pricing
TTD $3,500 + VAT

* Sessions delivered at the AA Success Centre in Trinidad & Tobago. Lunch, morning & afternoon snack break refreshments are included in the price.

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

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

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Power BI Secrets & Techniques
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Day 1	8:30am – 4:00pm	Wednesday 17th Mar, 2027

Outline

Time	Course Topics	
8:30 am-10:00 am	**Overview of Power BI**	
10:00am-10:15am	Breaktime	
10:15am-12:00pm	**Getting & manipulating data - Practical exercises**	
	• Connect to data sources in Power BI Desktop • Data quality audit check techniques in the Query editor module • Cleansing & transforming data with audit trail in the Query Editor • Merge and append data from multiple sheets and files • Perform fuzzy lookup matches, automate calculations • Practical examples - more advanced data transformations using the query editor – multi level data header issues • Grouping / bucketing data in Power Query • Cleansing techniques - irregularly formatted data	
12:00 pm-1:00pm	Lunch Break	
1:00pm - 1:45pm	Getting data - Practical exercises cont'd	
1:45pm - 2:45pm	**Connecting & interrogating database** ▪ Review imported relationships, Determine manual relationships ▪ Qptimising data load & building sliceable reports	
2:45pm - 3:00pm	Breaktime	
3:00pm-4:00pm	**Creating Visualizations**	
	▪ Introduction to Power BI visuals ▪ Create & customize visualizations - a practical exercise, again using the Contoso Access Database ▪ Modify colors in charts & visuals ▪ Shapes, text boxes, and images	▪ Page layout and formatting ▪ Group interactions among visualizations ▪ Summarization and category options ▪ Visual hierarchies, drill-down, filtering & slicing

Power BI Secrets & Techniques
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Day 2	8:30am – 4:00pm	Thursday 18th Mar, 2027

Outline

<table>
<tr><th>Time</th><th colspan="2">Course Topics</th></tr>
<tr><td colspan="3">15 minute breaks in morning and afternoon sessions</td></tr>
<tr><td rowspan="2">8:30 am-
3:00 pm</td><td colspan="2">Detailed case exercise to build a full scope relational reporting model in Power BI. Recap & apply the Day 1 techniques alongside new tips, tricks & techniques to create business monitoring reports</td></tr>
<tr><td>▪ Get data from multiple sourses
▪ Perform data cleansing / transformation routines
▪ Build automated calandar tables
▪ Create Data Table relationships
▪ Edit your data relationships
▪ Table relationships and DAX
▪ Create calculated columns & measures - DAX
▪ Optimize your data model to speed up running reports</td><td>▪ Automating your date calendar for time period analysis
▪ Virtual query tables and filtering
▪ Include filters / slicers in the report
▪ Include a time hierachy for drill down in report
▪ Create bookmarks in Reports for easy insights review
▪ Publish report to Power BI service
▪ Audit trailing data to your reports</td></tr>
<tr><td>12:00pm-
1:00pm</td><td colspan="2">Lunch Break</td></tr>
<tr><td rowspan="2">3:00pm-
4:15pm</td><td colspan="2">The Power BI Service</td></tr>
<tr><td>▪ Insights in Power BI service
▪ Configuring a dashboard
▪ Create custom Q&A suggestions
▪ Share dashboards with your organization
▪ Get more space on your dashboard</td><td>▪ Power BI service Import / Export
▪ Upload Excel data to Power BI
▪ Import Power View and Power Pivot reports to Power BI
▪ Excel in Power BI - summary
▪ Publish to Power Point & the web</td></tr>
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Trainer Profiles

Shakeel Hosein B.Sc., M.Sc., MCT

Shakeel Hosein is an IT trainer with over 12 years' experience in education and IT training. Shakeel possesses a Bachelor of Science (B.Sc.) degree in **Computer Science** from the University of Hertfordshire in England and a Master of Science degree in **Geoinformatics** from the University of The West Indies. He is a Microsoft Certified Trainer and holds an Expert Excel Certification in MS Excel versions 2019 & Office 365.

Shakeel has been a facilitator/ trainer with Areef Ali and Associates for the past six years in the areas of Microsoft Excel and Microsoft Power BI. During that time has taught basic and intermediate Excel, and Power BI. Also, he has assisted in training in Advanced Excel.

He has facilitated inhouse and onsite training for a number of organisations.

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
AABS 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