

Power BI + Power Automate + AI: Automated Reporting & Analysis Workshop: Prerequisites and Curriculum



Software Requirements

Windows Operating System or MacBook Parallel System

Power BI Desktop (Free)

Office 365 Business Account (Free trial)

Power BI Pro (Free trial)

Free trial registration instructions will be sent prior to the start of the workshop

Power BI Prerequisites Skills

Participants are **required** to have basic Power BI dashboard creation skills and be comfortable navigating and working within Power BI Desktop. This is not a beginner Power BI course.

Introduction to Power BI

Data source connections

Data import via Power Query

Chart selections

Filtering and sorting data

Formatting (Colors, themes, branding, fonts, logos)

Dynamic dashboards

Aggregations

Data types

Topics Covered

Configure and manage scheduled Power BI data refreshes

Create automated flows using Power Automate triggers and actions

Trigger reporting processes based on a schedule or business event

Automate the refresh and distribution of Power BI reports

Send automated email notifications and reporting updates to stakeholders

Use Power Automate and Copilot to distribute Power BI report information and business insights

Incorporate AI-generated analysis into the automated reporting process

Use AI to summarize KPIs, trends, variances, and changes in business performance

Automatically deliver AI-generated business analysis to stakeholders

Build an end-to-end automated reporting process using Power BI, Power Automate, and AI

Software That Will Be Used



POWER AUTOMATE



COPILOT (AI)



SHAREPOINT



POWER BI



DATA TELLS A STORY. BE THE STORYTELLER