

Excel + Power BI Automated Reporting Workshop: Prerequisites and Curriculum



Software Requirements

Windows Operating System or MacBook Parallel System

Power BI Desktop (Free)

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 using Power BI Web Services

Automate the **refresh** and **distribution** of Power BI reports using a live Excel data connection

Build an end-to-end automated reporting process using **Power BI**, **SharePoint**, and **Excel Online**

Software That Will Be Used



POWER BI



EXCEL (ONLINE)



SHAREPOINT



DATA TELLS A STORY. BE THE STORYTELLER