Business Intelligence Tool & Company Analysis
Steps for using Microsoft Power BI

Once you have your data and have cleaned/edited your data in Excel or another platform, you are now ready to use Power BI.

IMPORT

1. Open Power BI Desktop where you will be prompted to 'Import Your Data'. Select the file where you saved the data, and the dataset should load right into Power BI Desktop.

CREATING REPORTS/VISUALIZATIONS

2. Once the data is loaded, participants will be able to create visualizations which are populated on the right of the page. Walk them through how to create reports (1 per question). This is a chance for the participants to think about which visualizations fit best to answer the proposed questions. The presenter and any other facilitators should be assisting participants exhibiting difficulties during this time.
3. Reports are created by selecting one or more of the 'Fields' on the right-hand side of the screen. You can initially check off and/or drag a field to the white screen where Power BI will assume the best visualization for the combination that you have chosen. However, you can always change the visualization to your liking by clicking another visualization and/or editing fields on the page.
4. Understand that not every combination of 'Fields' will yield results. If you run into an issue, try another combination of 'Fields' as it may have to do with data relationship issues with the data that will not be addressed in this lesson.
5. To create another report, simply click on the '+' Tab under the white screen. You will note that Power BI is somewhat similar to Excel in some of its features, making the software intuitive to navigate for those familiar with Excel.

PUBLISH/CREATE DASHBOARD

1. Once reports are finished, participants will publish the reports to Power BI Online. They can do so by clicking 'Publish' in the upper right corner of the ribbon. Once the work is published, a dialog box should pop up asking you to view your work on Power BI Online. This is an easy way to access your published reports.
2. Once on Power BI Online, using the reports, participants will create individualized dashboards to illustrate answers to the questions posed.

Supplemental video on how to use Microsoft Power BI Software: https://youtu.be/AuYzsfXKkbM