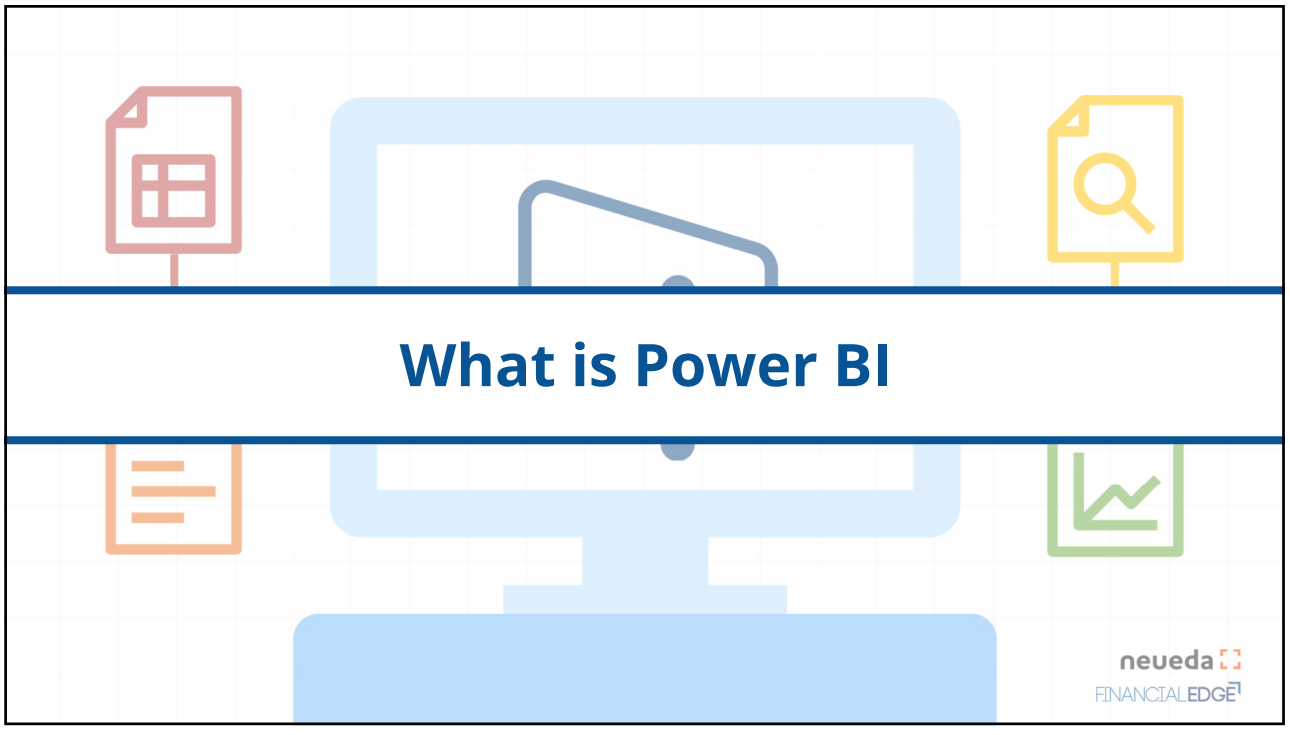
Getting Started with Power BI

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BUSINESS INTELLIGENCE SOFTWARE

Work with **large datasets**

Produce reports with **actionable insights**

Identify **patterns & trends**

Better informed decisions

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STEP **1**

STEP **2**

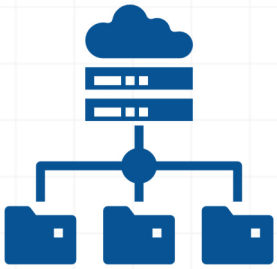
STEP **3**

STEP **4**

STEP **5**

Connect to a Data Source

Data is not generated in Power BI



Connect to system and import a copy

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STEP 1
STEP 2
STEP 3
STEP 4
STEP 5

Cleanse/Transform the Data

Data often contains errors



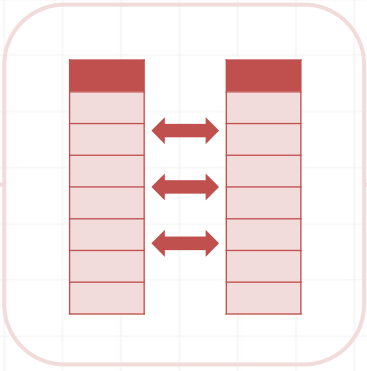
Structure will determine analysis

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STEP 1
STEP 2
STEP 3
STEP 4
STEP 5

Model the Data

More than 1 table in report...



...join tables to visualize both

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STEP 1
STEP 2
STEP 3
STEP 4
STEP 5

Analyze & Visualize the Data

Tools to **analyze the data**



Tools to **display results** in charts

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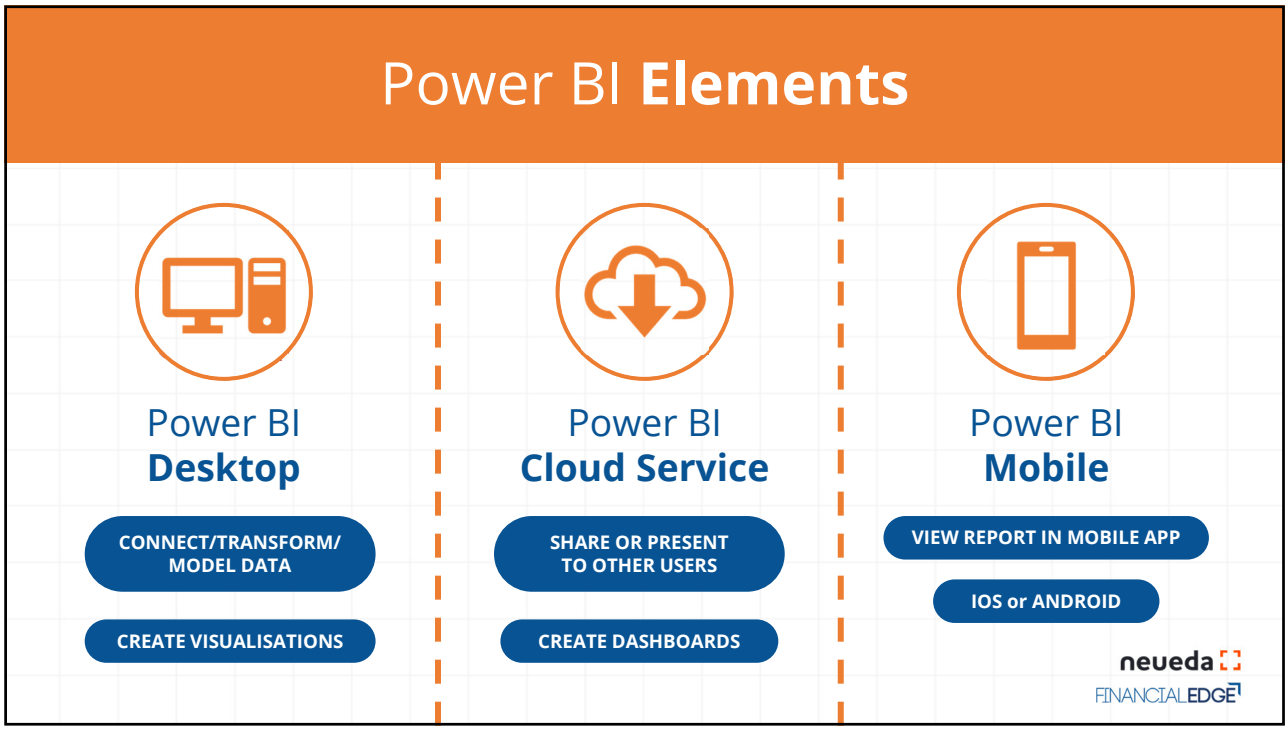
STEP 1
STEP 2
STEP 3
STEP 4
STEP 5

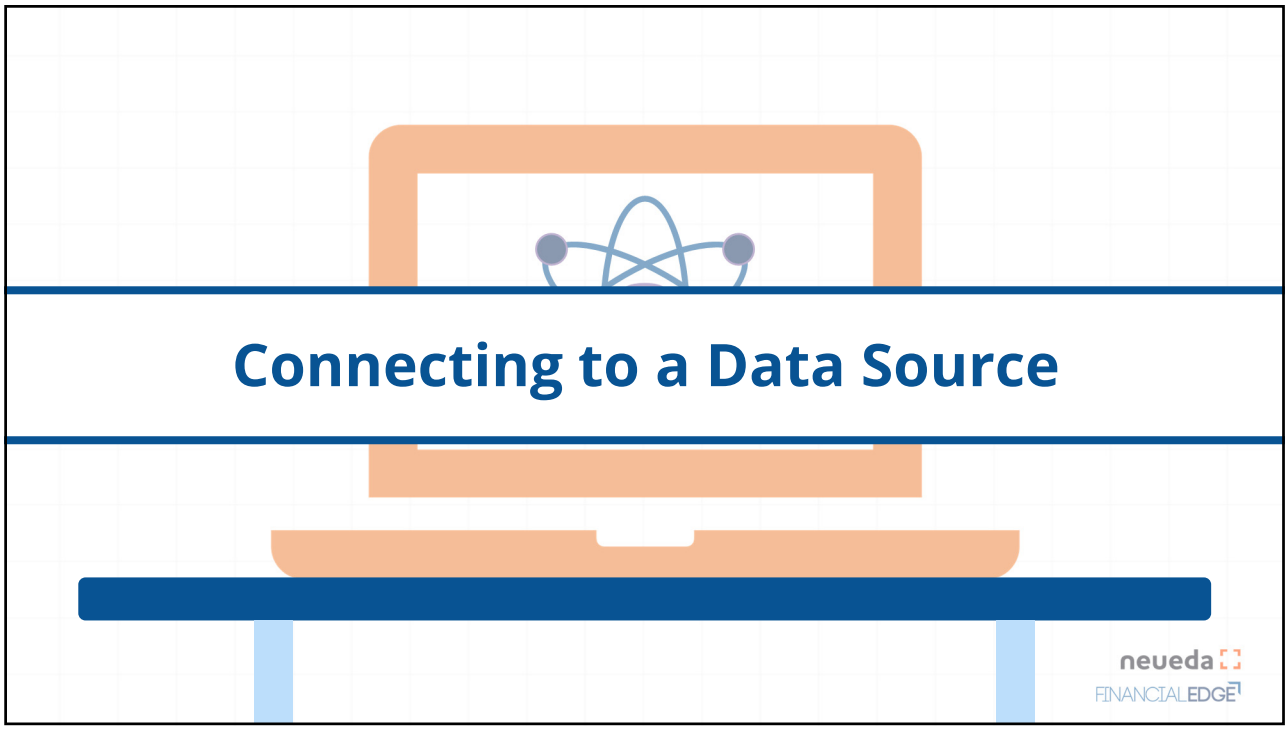
Share & Present the Data



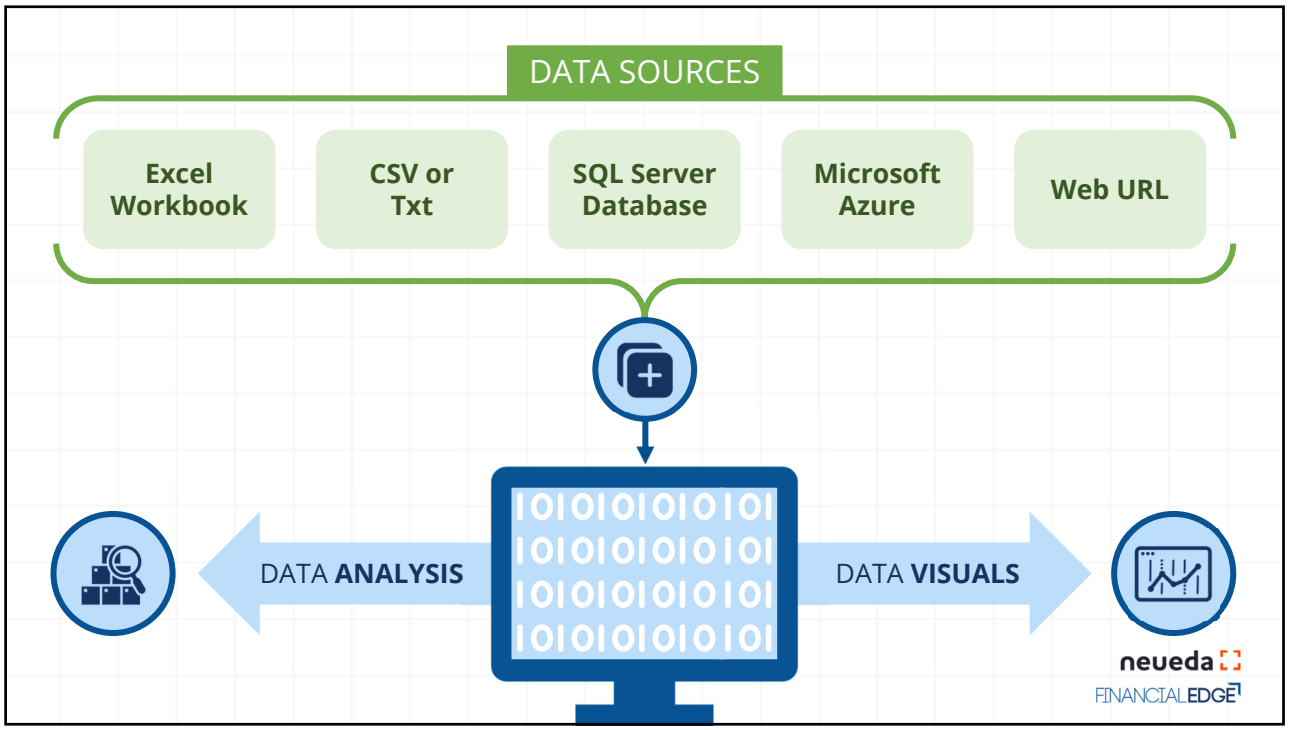
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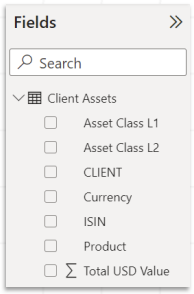


Connecting to an **Excel Workbook**

CLIENT DATA | TRANSACTION DATA | ASSET DATA | AND MORE

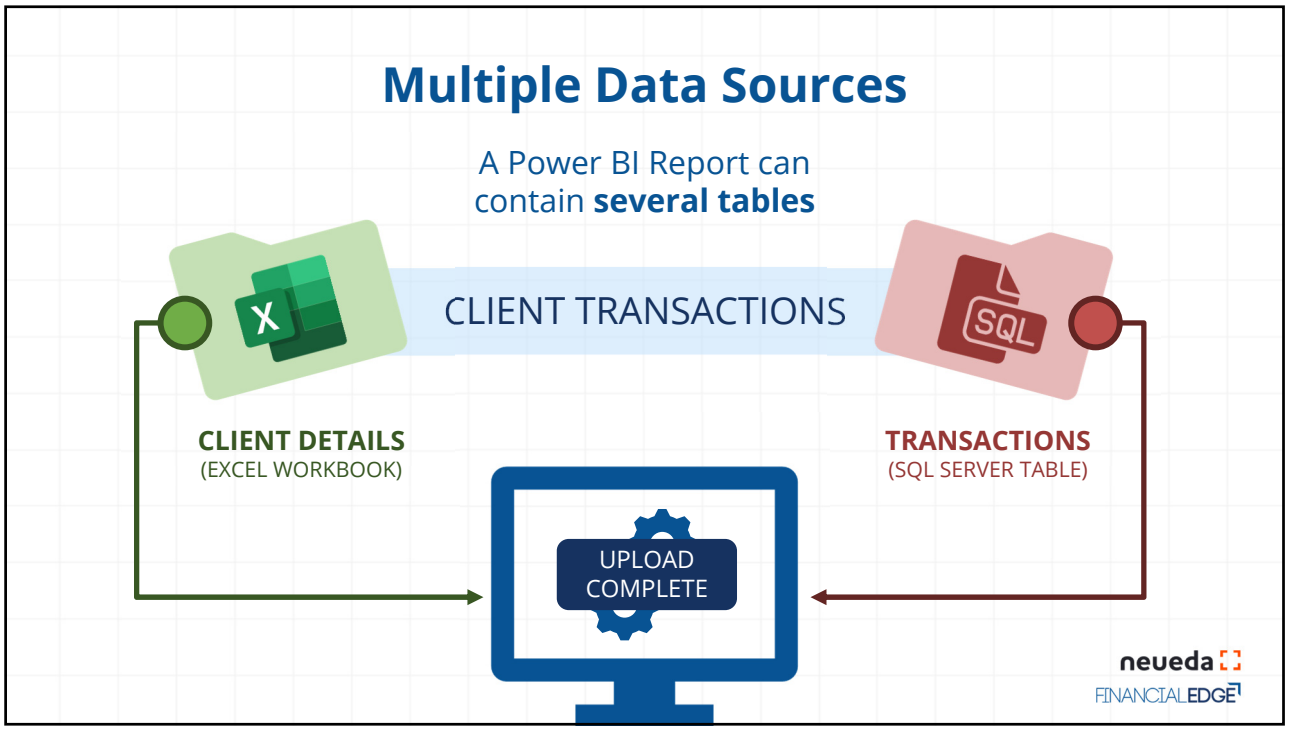
Field Names

	A	B	C	D	E	F	G
1	CLIENT	ISIN	Product	Currency	Asset Class L1	Asset Class L2	Market Value USD
2	Client A	ZKY09699770	BRAVO III OFF SEL FEEDER	USD	Real Estate	Diversified Real Estate	579,621.84
3	Client A	US594918104	MICROSOFT CORP	USD	Equities	Developed Equities	1,930,908.09
4	Client A	US679295105	OKTA INC	USD	Equities	Developed Equities	1,586,685.19
5	Client A	US742718109	PROCTER & GAMBLE CO/T	USD	Equities	Developed Equities	544,384.32
6	Client A	GB00B082RF1	RENTOKIL INITIAL PLC	GBP	Equities	Developed Equities	1,749,774.55



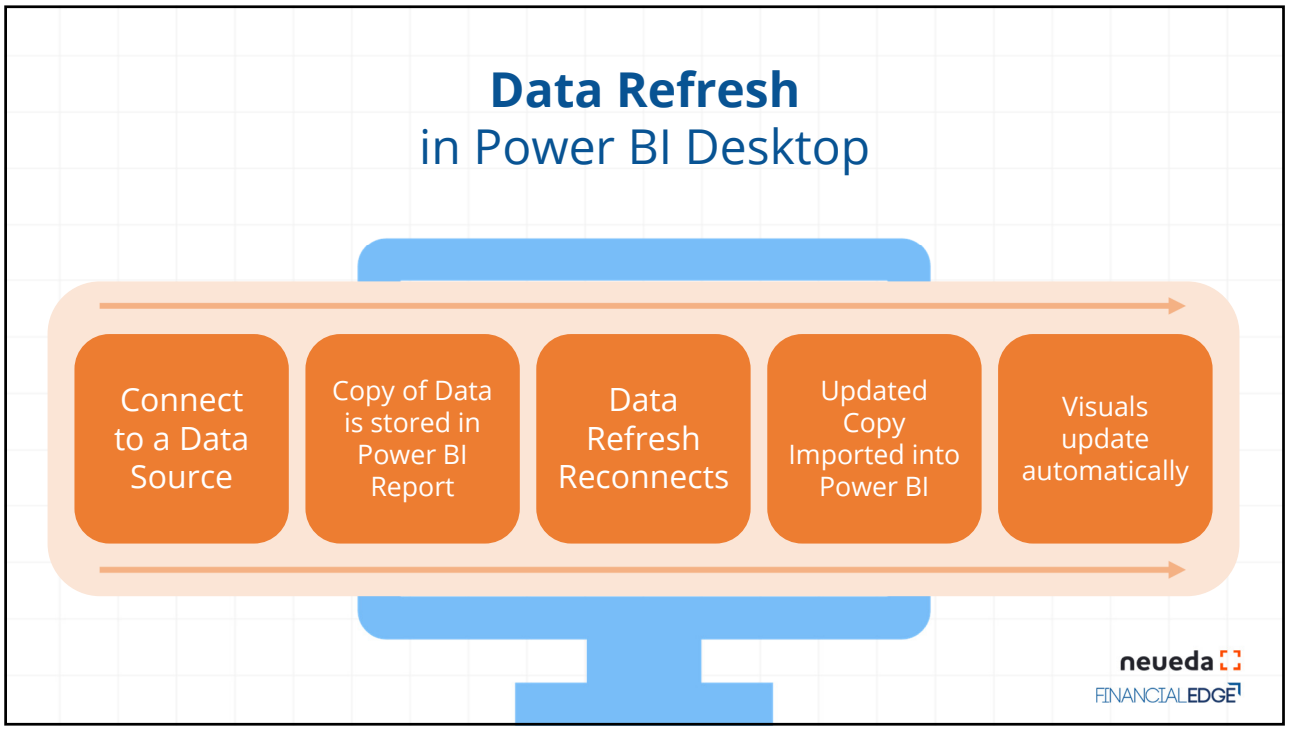
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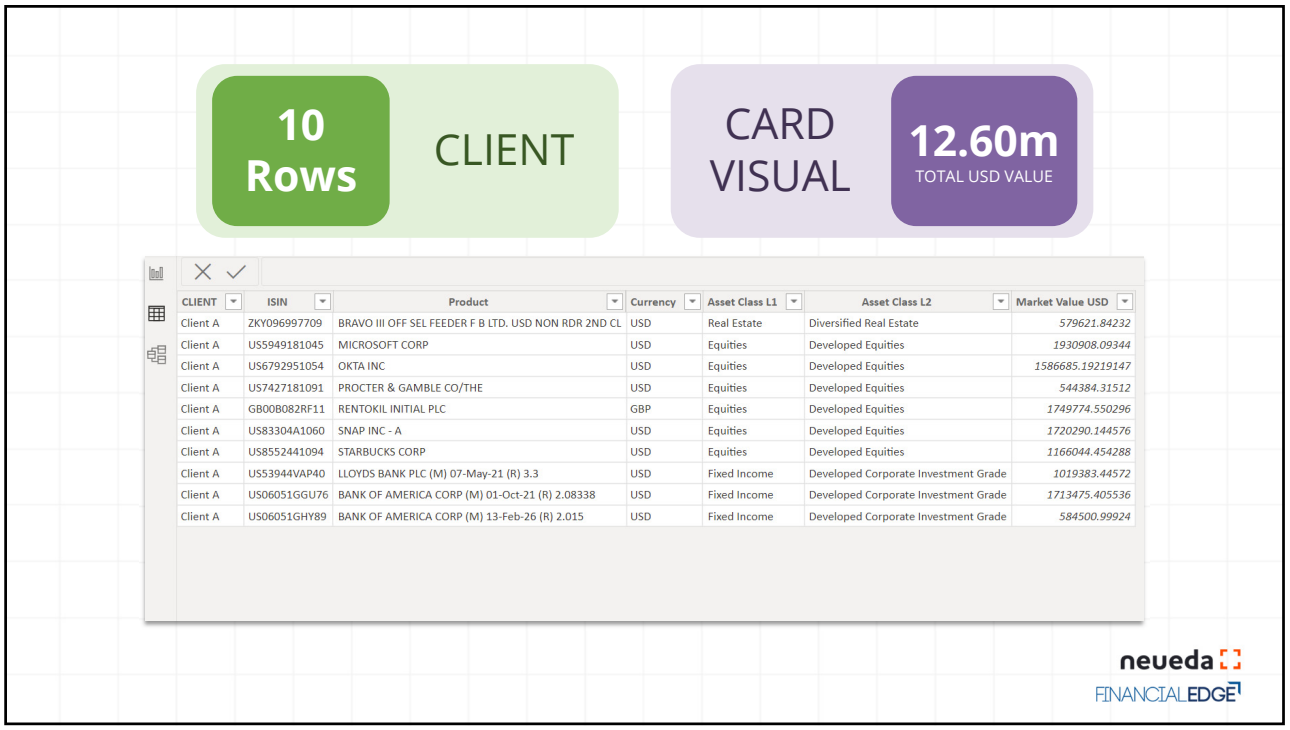
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CLIENT	ISIN	Product	Currency	Asset Class L1	Asset Class L2	Market Value USD
Client A	ZKY096997709	BRAVO III OFF SEL FEEDER F B LTD. USD NON RDR 2ND CL	USD	Real Estate	Diversified Real Estate	579621.84232
Client A	US5949181045	MICROSOFT CORP	USD	Equities	Developed Equities	1930908.09344
Client A	US6792951054	OKTA INC	USD	Equities	Developed Equities	1586685.19219147
Client A	US7427181091	PROCTER & GAMBLE CO/THE	USD	Equities	Developed Equities	544384.31512
Client A	GB00B082RF11	RENTOKIL INITIAL PLC	GBP	Equities	Developed Equities	1749774.550296
Client A	US83304A1060	SNAP INC - A	USD	Equities	Developed Equities	1720290.144576
Client A	US8552441094	STARBUCKS CORP	USD	Equities	Developed Equities	1166044.454288
Client A	US53944VAP40	LLOYDS BANK PLC (M) 07-May-21 (R) 3.3	USD	Fixed Income	Developed Corporate Investment Grade	1019383.44572
Client A	US06051GGU76	BANK OF AMERICA CORP (M) 01-Oct-21 (R) 2.08338	USD	Fixed Income	Developed Corporate Investment Grade	1713475.405536
Client A	US06051GHY89	BANK OF AMERICA CORP (M) 13-Feb-26 (R) 2.015	USD	Fixed Income	Developed Corporate Investment Grade	584500.99924

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Excel Workbook

	A	B	C	D	E	F	G
1	CLIENT	ISIN	Product	Currency	Asset Class L1	Asset Class L2	Market Value USD
2	Client A	ZKY096997709	BRAVO III OFF SEL FEEDER	USD	Real Estate	Diversified Real Estate	579,621.84
3	Client A	US5949181045	MICROSOFT CORP	USD	Equities	Developed Equities	1,930,908.09
4	Client A	US6792951054	OKTA INC	USD	Equities	Developed Equities	1,586,685.19
5	Client A	US7427181091	PROCTER & GAMBLE CO/T	USD	Equities	Developed Equities	544,384.32
6	Client A	GB00B082RF11	RENTOKIL INITIAL PLC	GBP	Equities	Developed Equities	1,749,774.55
7	Client A	US83304A1060	SNAP INC - A	USD	Equities	Developed Equities	1,720,290.14
8	Client A	US8552441094	STARBUCKS CORP	USD	Equities	Developed Equities	1,166,044.45
9	Client A	US53944VAP40	LLOYDS BANK PLC (M) 07-	USD	Fixed Income	Developed Corporate Investment Grade	1,019,383.45
10	Client A	US06051GGU76	BANK OF AMERICA CORP (	USD	Fixed Income	Developed Corporate Investment Grade	1,713,475.41
11	Client A	US06051GHY89	BANK OF AMERICA CORP (	USD	Fixed Income	Developed Corporate Investment Grade	584,501.00
12	Client A	US09322NHY90	BANK OF AMERICA CORP (	USD	Fixed Income	Developed Corporate Investment Grade	500,000.00
13							13,095,068.44

VISUALS UPDATED

UPDATE DATASET

ADDITIONAL ROW

Schedule refreshes

Ad hoc refreshes

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Power BI Dataset Updated

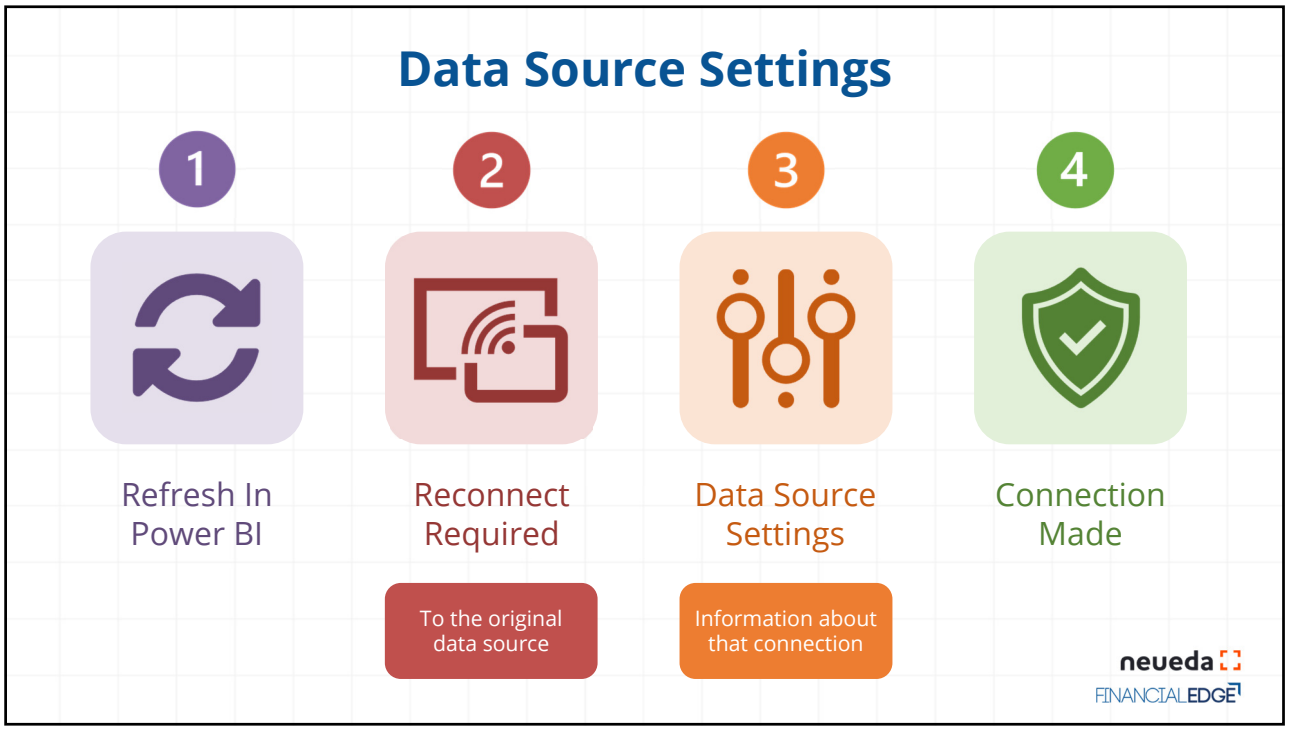
CLIENT	ISIN	Product	Currency	Asset Class L1	Asset Class L2	Total USD Value
Client A	ZKY096997709	BRAVO III OFF SEL FEEDER F B LTD. USD NON RDR 2ND CL	USD	Real Estate	Diversified Real Estate	*579621.84232*
Client A	US5949181045	MICROSOFT CORP	USD	Equities	Developed Equities	*1930908.09344*
Client A	US6792951054	OKTA INC	USD	Equities	Developed Equities	*1586685.19219147*
Client A	US7427181091	PROCTER & GAMBLE CO/THE	USD	Equities	Developed Equities	*544384.31512*
Client A	GB00B082RF11	RENTOKIL INITIAL PLC	GBP	Equities	Developed Equities	*1749774.550296*
Client A	US83304A1060	SNAP INC - A	USD	Equities	Developed Equities	*1720290.144576*
Client A	US8552441094	STARBUCKS CORP	USD	Equities	Developed Equities	*1166044.454288*
Client A	US53944VAP40	LLOYDS BANK PLC (M) 07-May-21 (R) 3.3	USD	Fixed Income	Developed Corporate Investment Grade	*1019383.44572*
Client A	US06051GGU76	BANK OF AMERICA CORP (M) 01-Oct-21 (R) 2.08338	USD	Fixed Income	Developed Corporate Investment Grade	*1713475.405536*
Client A	US06051GHY89	BANK OF AMERICA CORP (M) 13-Feb-26 (R) 2.015	USD	Fixed Income	Developed Corporate Investment Grade	*584500.99924*
Client A	US09322NHY90	BANK OF AMERICA CORP (M) 13-Feb-26 (R) 2.016	USD	Fixed Income	Developed Corporate Investment Grade	*500000*

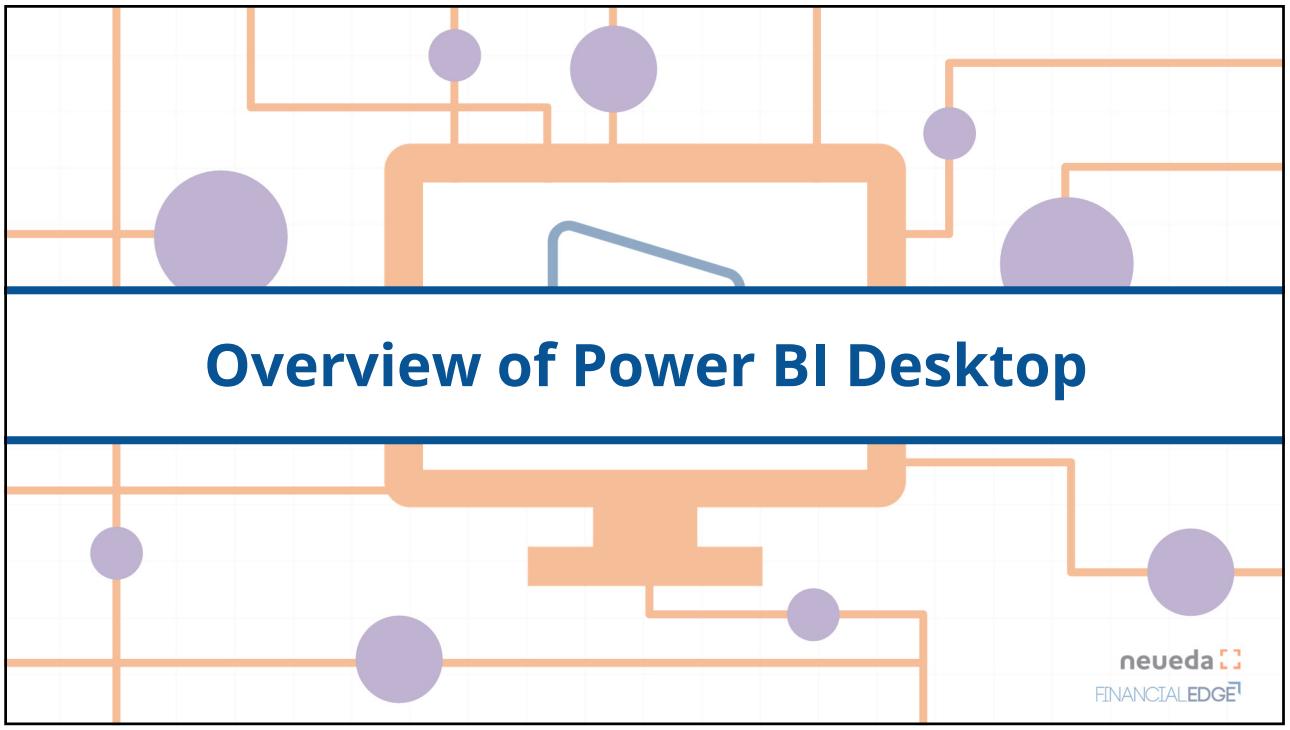
CARD VISUAL

13.10m
TOTAL USD VALUE

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Report View

Data View

Model View

SWITCH VIEWS – CLICK ICONS FAR LEFT OF SCREEN

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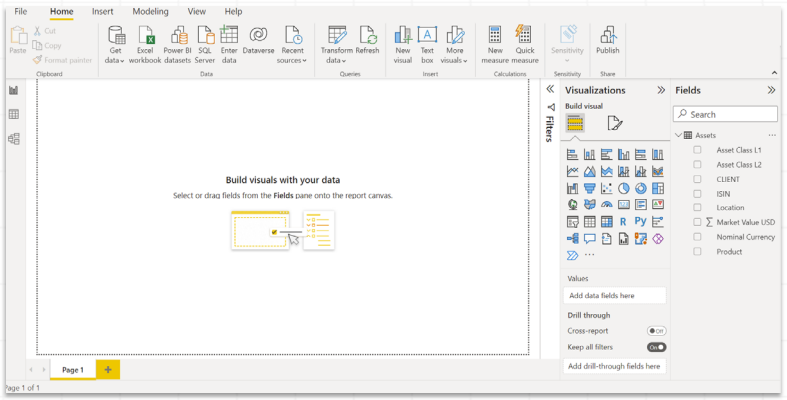
Report View

Build visuals

Range of chart types

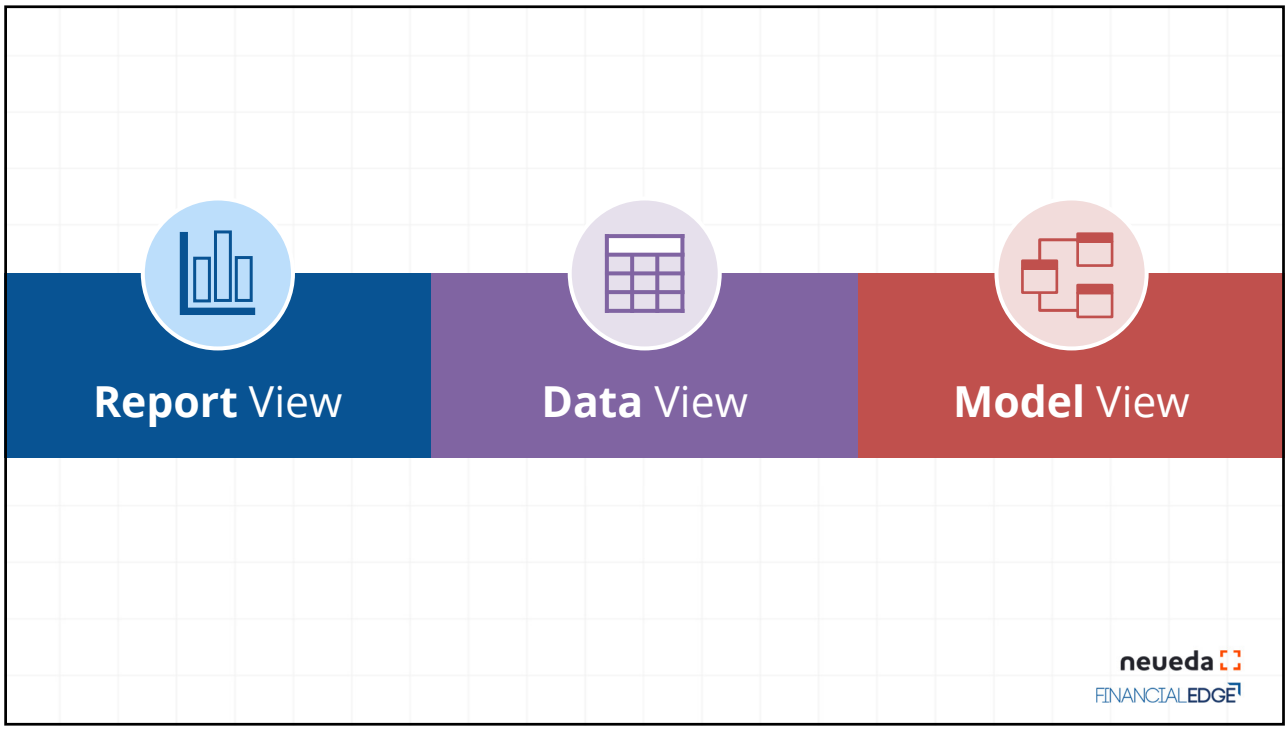
Pie/bar/line/maps/scatter/cards

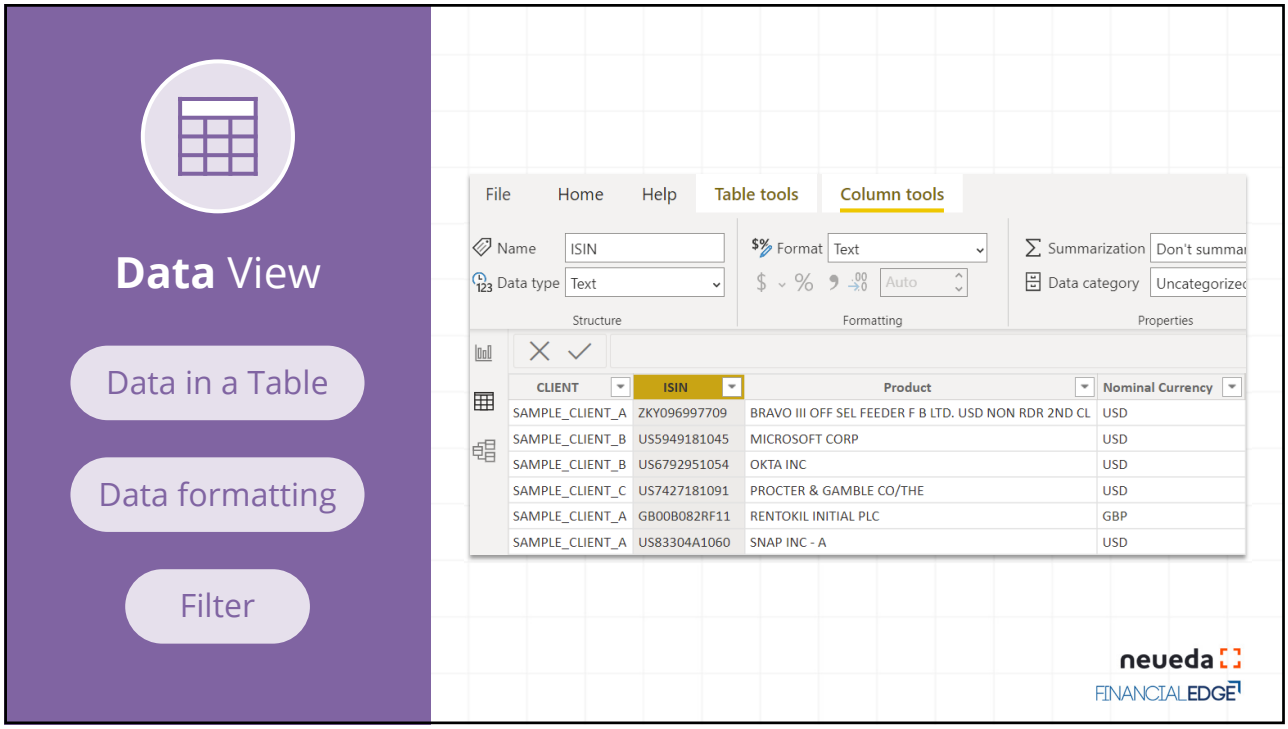
Field names listed



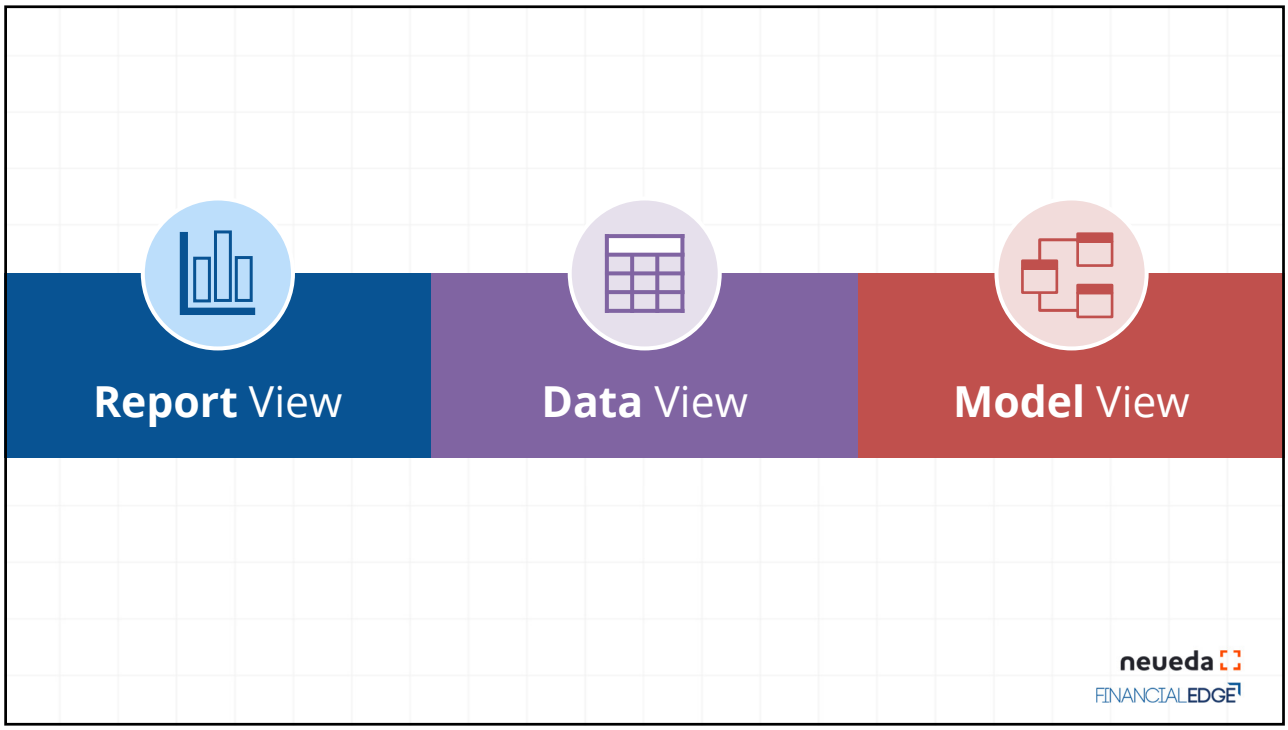
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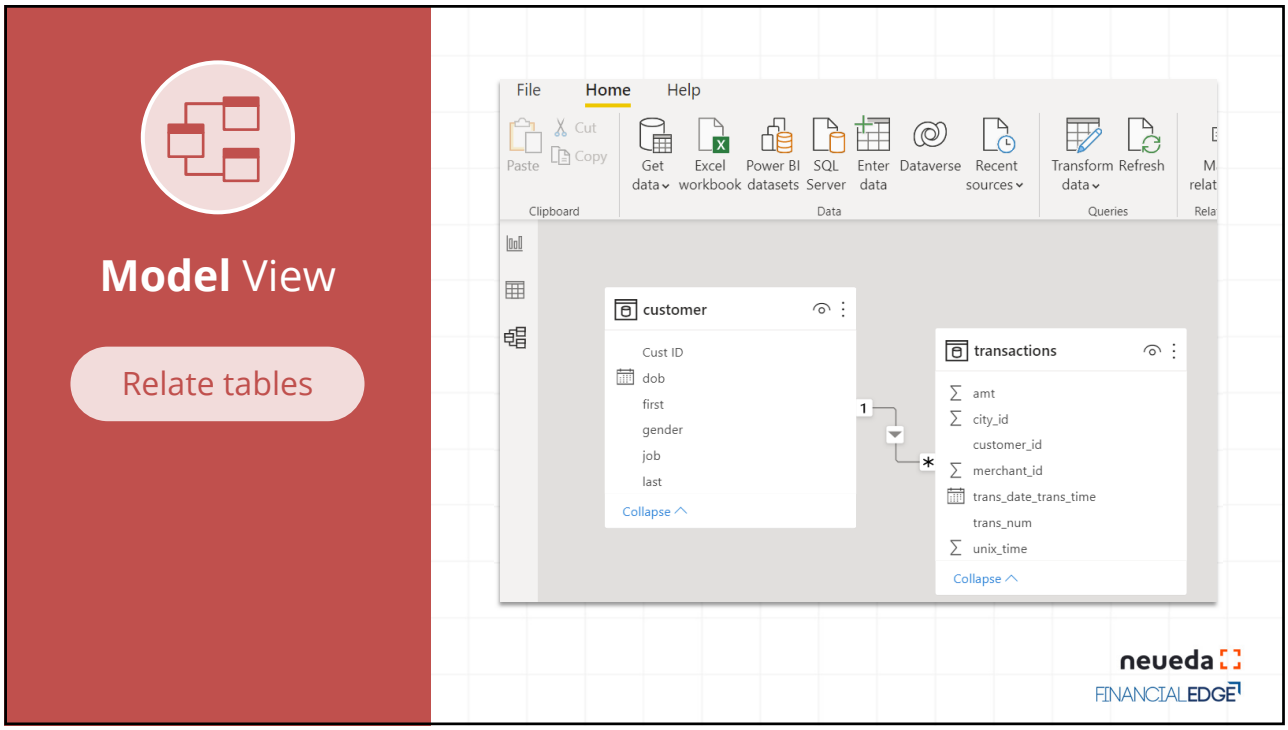
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Bar and Column Charts

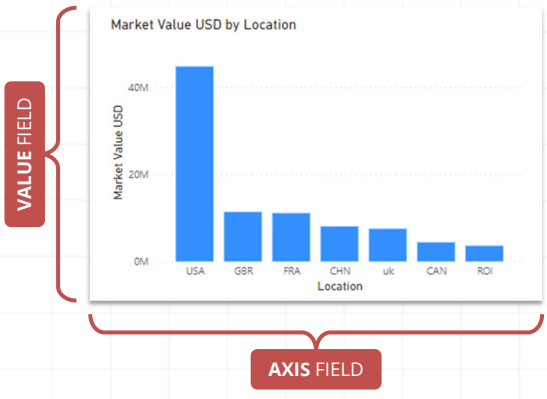
Bar and Column Charts

Most common chart types

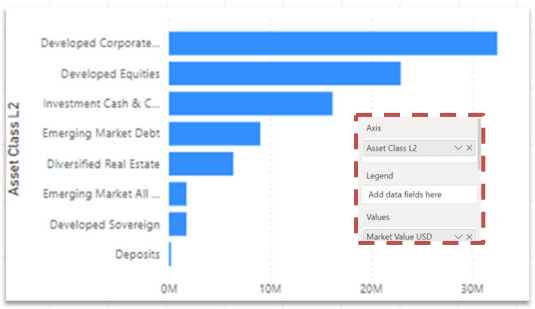


Comparison of values

HIGHEST TO **LOWEST**



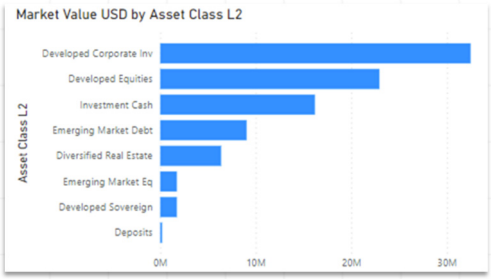
SMALLEST TO **LARGEST**



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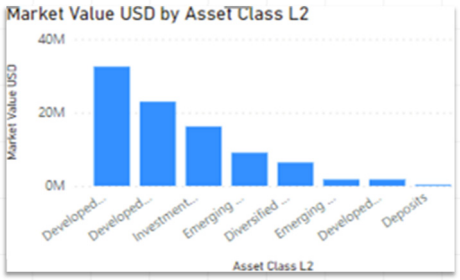
Bar or Column?

Bar = Horizontal



Use a bar chart. Easier to read

Column = Vertical



Long & descriptive x axis labels

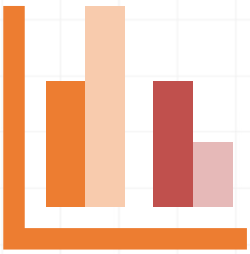
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Bar and Column Charts

Several **different styles available**



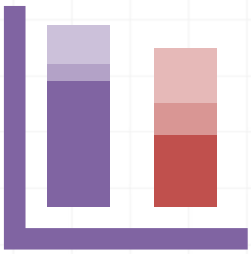
CLUSTERED



Most common chart type

More insightful comparisons

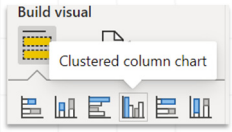
STACKED



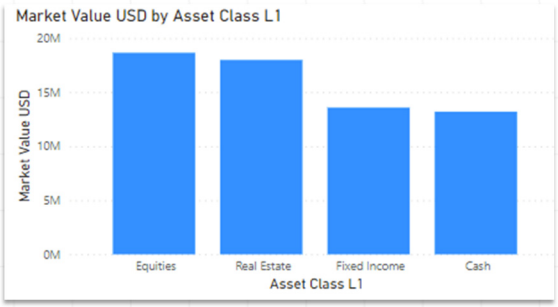
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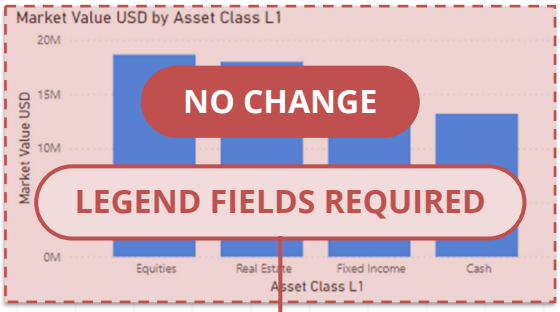
Clustered or Stacked?



CLUSTERED



STACKED



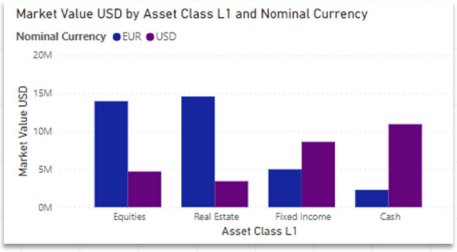
Additional field used on the chart to give further insight into **how the values are distributed**

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Nominal Currency Codes

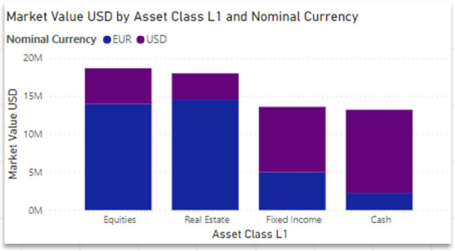
(LEGEND FIELD)

CLUSTERED



Easier to **compare the results** for each currency in a single asset

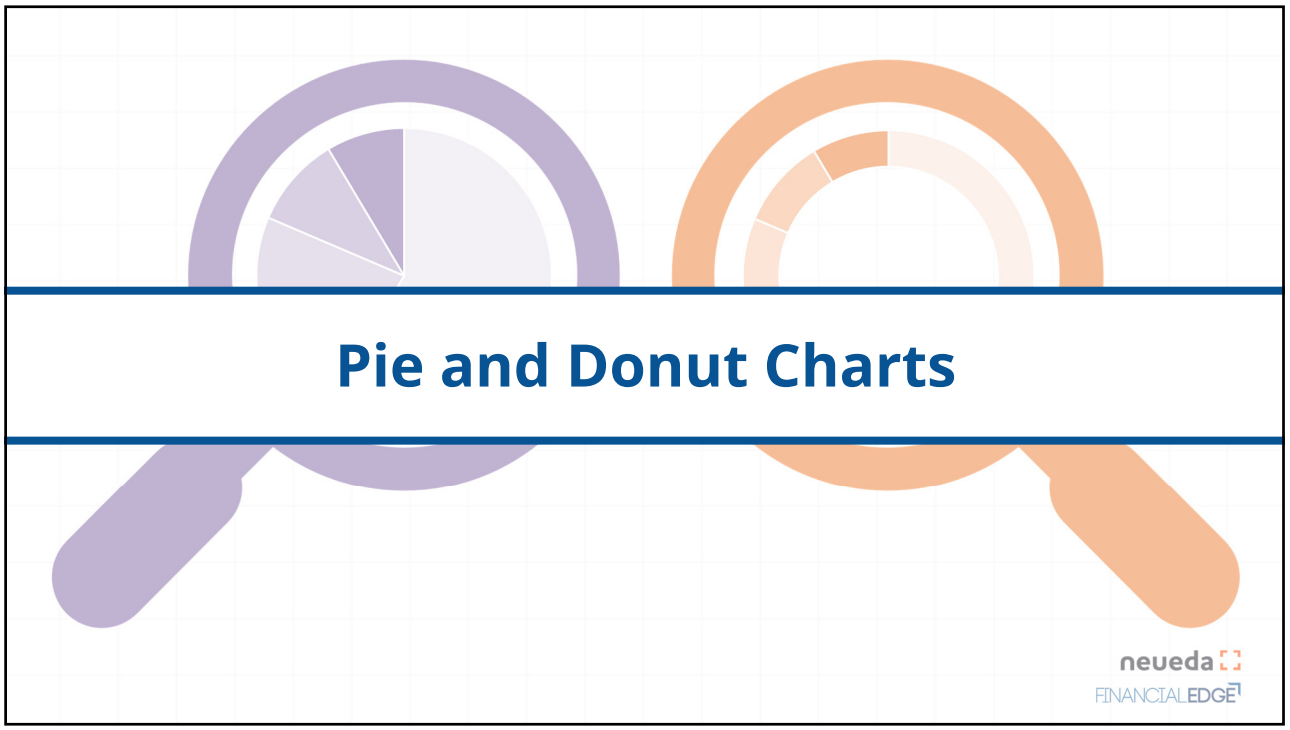
STACKED

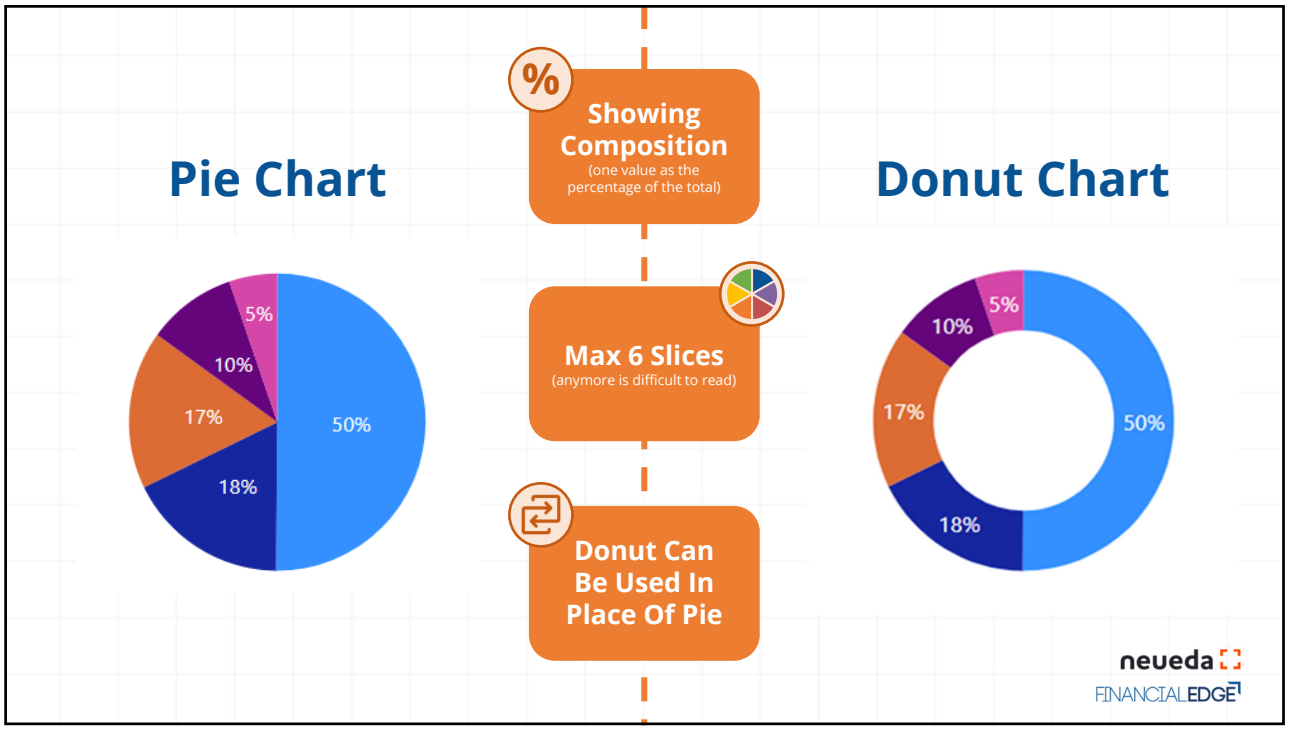


Easier to see the **overall asset total** on a stacked chart

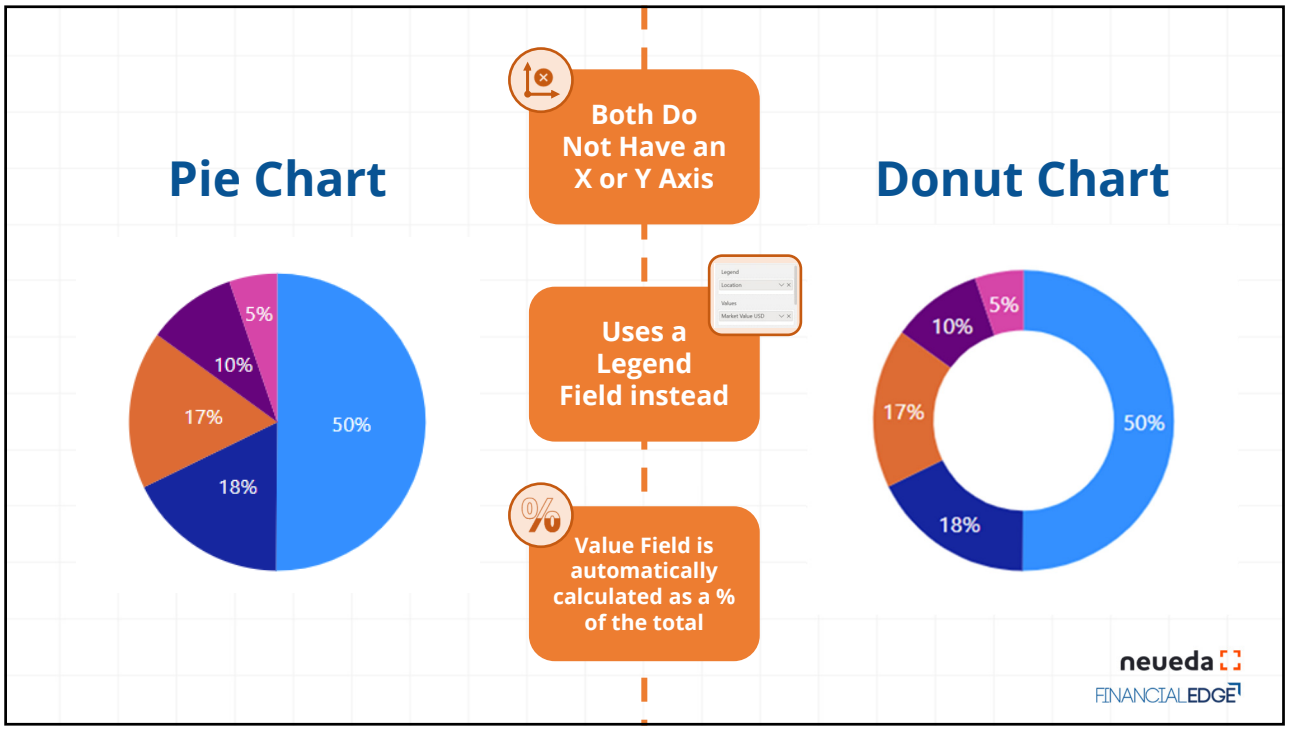
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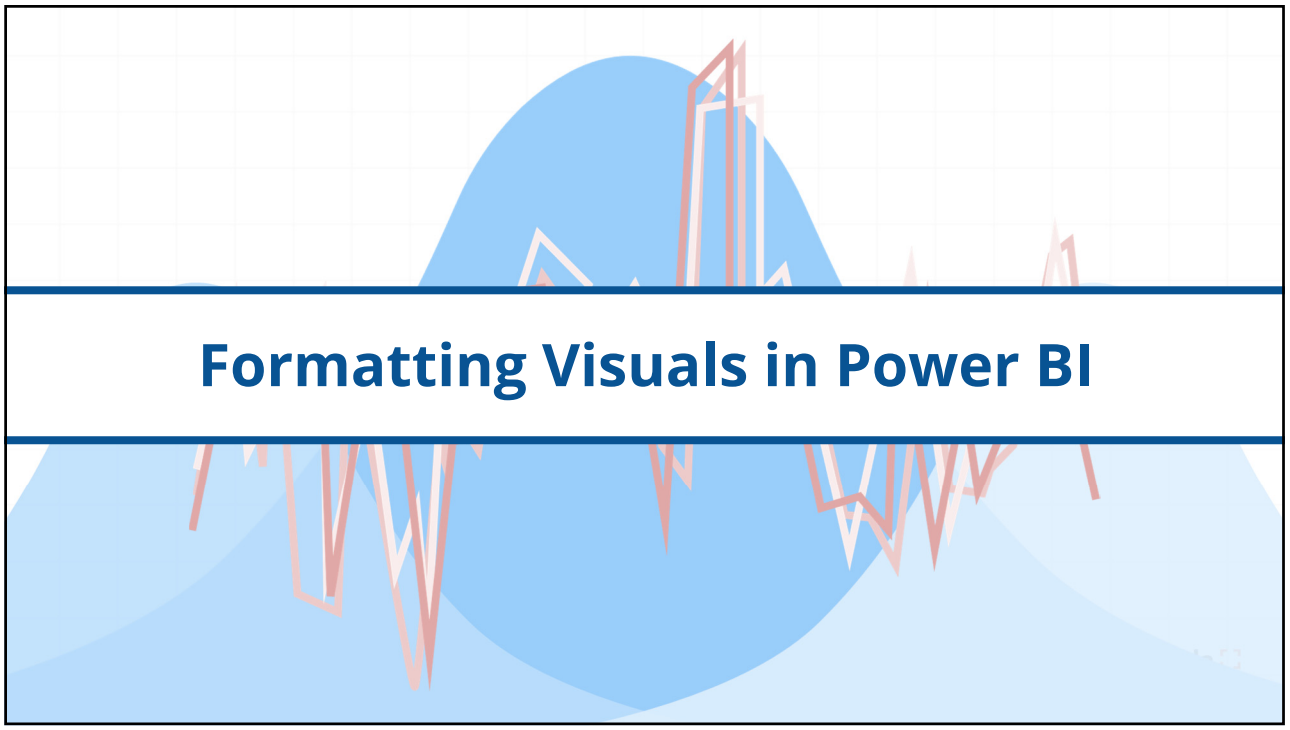
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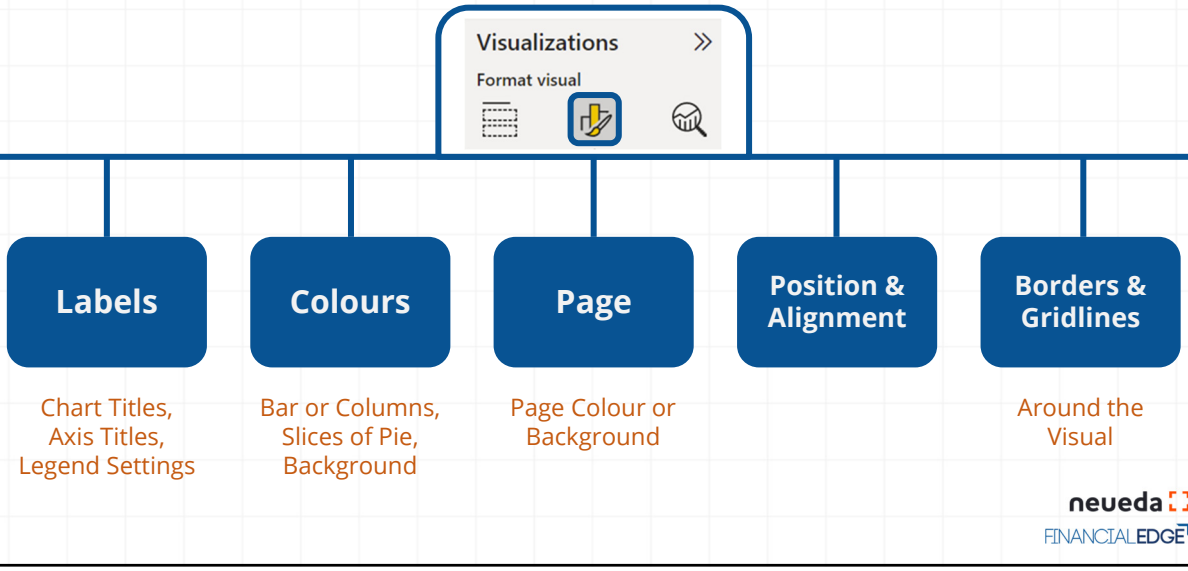
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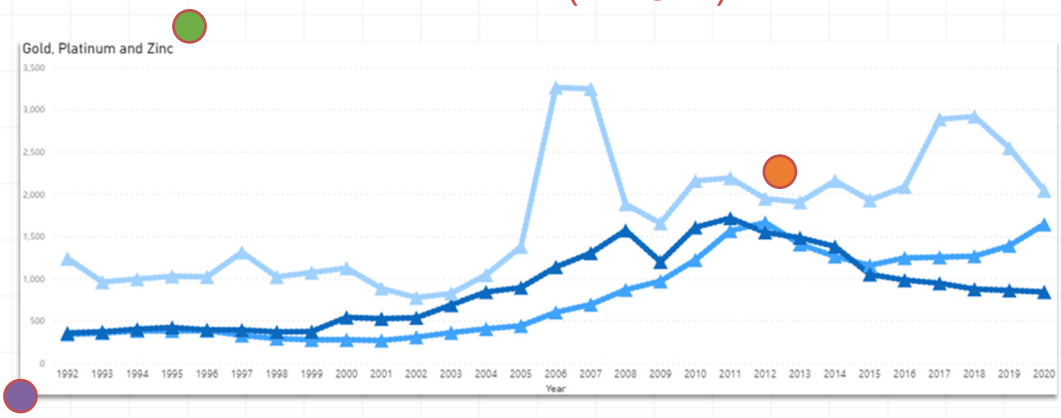
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Formatting in Power BI



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EXAMPLE A (BEFORE)



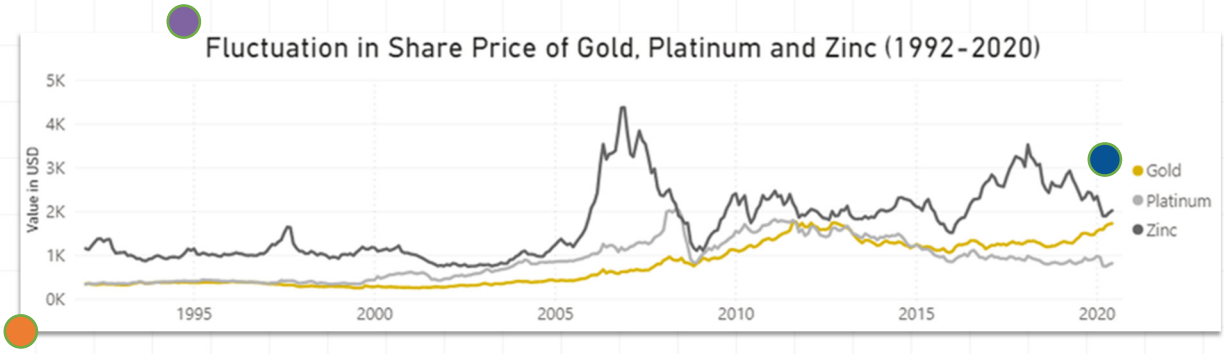
Axis Labelling | Additional Markers | Poor titles

DIFFICULT TO READ CHARTS

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EXAMPLE A (AFTER)



Clear titles

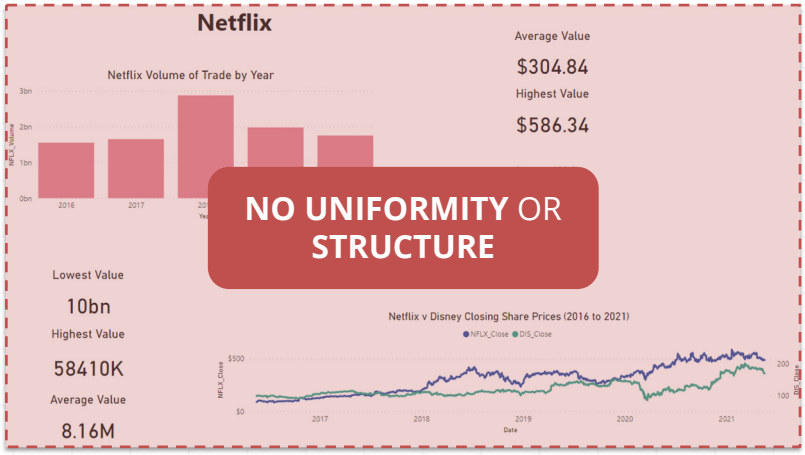
Better labelling on axis

Colour coding

EASIER TO READ CHARTS

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EXAMPLE B (BEFORE)

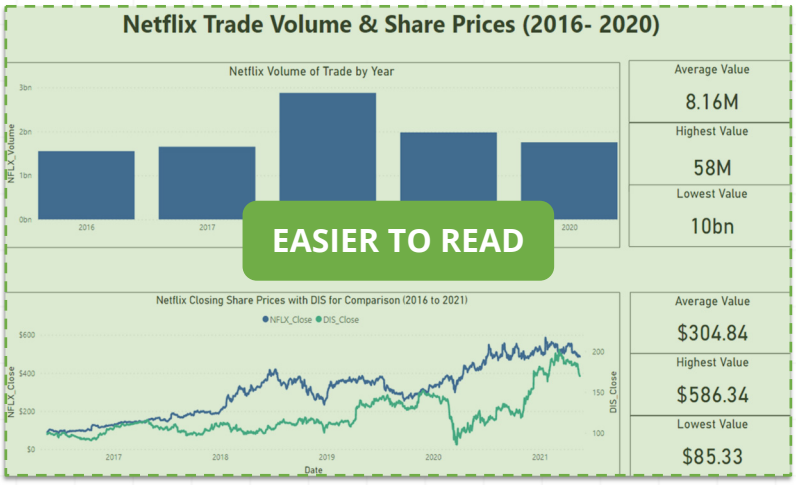


- ✗ Visuals are **aligned**
- ✗ Correct **labelling**
- ✗ Consistent **colours**
- ✗ Consistent **sizing**

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EXAMPLE B (AFTER)



- Realigning
- Positioning
- Consistent **colours**
- Consistent **sizing**

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