



## Your Expert Trainer

**Alvin Yong**  
Founder and CEO  
Olygen

### Methodologies:

Clear explanation of theories coupled with hands-on exercises for a firm grasp of Power BI through:

- Practical Examples
- Case Studies
- Short Exercises
- Group Discussions

### Software Used:

Power BI Desktop

Download here:  
<https://powerbi.microsoft.com/desktop/>

# Power BI Dashboard & Report Masterclass:

## Analyse and Visualise Data with Power BI

29<sup>th</sup> – 30<sup>th</sup> October 2018 | Kuala Lumpur

1<sup>st</sup> – 2<sup>nd</sup> November 2018 | Penang

### Biography of Alvin Yong, MSc, FCCA, UK

Alvin Yong is a UK-registered Fellow Chartered and Certified Accountant (FCCA). He obtained his Master of Science in Professional Accountancy (Merit) in 2017 from the University of London.

Alvin started his career with KPMG Singapore as an auditor in 1999, where he was involved in the audit, due diligence and tax of multinational corporations in various industries, including shipping and logistics, industrial manufacturing, medical and healthcare, construction consultancy and investment holdings.

With strong business acumen, Alvin went on to co-found several companies and has been an entrepreneur for more than 12 years. His companies have served clients across the globe, from US, Europe, Middle East, Africa, Asia to Australia. His current passion is data literacy training as well as innovation and growth consultancy. Alvin enjoys helping his clients understand the stories that their data tells about their business, thus enabling them to make informed, data-driven decisions.

### Testimonials

**CEO, Felda Prodata Systems:** "Alvin is a very people person. Sound knowledge in his area of expertise. He carried out the programme well."

**VP of Finance - APAC, Middle East & Africa, FIS Global:** "Alvin was well prepared, knowledgeable and easy to follow. Level of detail was where it needed to be and the documentation was very thorough. The course went quickly which was always a good sign."

**Financial Controller, BeMobile Ltd:** "Exceeded my expectations! I realised how dynamic Excel can be. Understanding the basic formulas is just so important for creating dynamic and interactive dashboards."

**Manager, Global Credit Policy and Portfolio Risk, Standard Chartered Bank:** "Fantastic trainer in terms of knowledge and skills. Extremely friendly, helpful and patient."

**AVP, Investor Solutions, i2M Ventures:** "Alvin is very knowledgeable in this field. I would recommend this training to others."

**Manager, CIMB Bank:** "Very experienced and good trainer."

**Learning & Development Specialist, Micron Semiconductor:** "Good understanding and knowledge of the subject. Attentive and responsive to participants' queries. Presented the subject very clearly."

**Manager - Human Capital, PNG Air Services:** "The training would be quite intense for someone who has very basic knowledge in Excel. Otherwise, Alvin made it easy for us to understand and took time to assist those that needed help. I have learnt a lot these last two days."

**Regional Component Planner, Komatsu Australia:** "Very informative. Gave an excellent count of how-to's."

**MUST BRING!**

Laptop with  
Power BI  
installed

# Power BI Dashboard & Report Masterclass: Analyse and Visualise Data with Power BI

29<sup>th</sup> – 30<sup>th</sup> October 2018 ( Kuala Lumpur ) | 1<sup>st</sup> – 2<sup>nd</sup> November 2018 ( Penang )

## Workshop Overview

Tired of struggling with countless complex Excel reports which contain hundreds of formulas, not to mention the headache of trying to make sure everyone is using the latest version. Power BI is a suite of interactive data visualisation business analytics tools that deliver insights throughout your organisation. You can use Power BI to connect to hundreds of data sources, simply data preparation, and drive ad hoc analysis. Power BI produces beautiful reports, then publish them for your organisation to consume on the web and across mobile devices. Everyone can create personalised dashboards with a unique, 360° view of their business and scale across the enterprise, with governance and security built-in.

We will show you how, without the need of former data analysis training or needing to learn another language, you can be building and sharing reports and dashboards that are useful and beautiful

## Key Takeaways

By the end of the course, participants will:

- Clean and transform data, model it and build KPIs and metrics that answer specific business questions
- Use DAX effectively to build time intelligence reports, slice reports by measures and filter according to context
- Access data from supported on-premises and cloud-based sources with automated, incremental refreshes
- Combining multiple data sources into one dataset
- Perform forecasting
- Apply security rules and share content
- Create stunning reports with interactive data visualisations
- Perform analytics and find patterns with Power BI features like quick measures, grouping, forecasting and clustering.

## Prerequisites

No prior knowledge of programming or data analysis is required.

## Who Should Attend

This workshop is crucial for analysts, managers, reporting professionals, business owners, executives, and anyone who need to derive and share insights with business data. This training is highly recommended for:

- Directors
- General Managers
- Finance Managers
- Business Analysts
- BI Professionals
- Sales Managers
- HR Managers
- Data Analytics Manager
- Business Owners
- Anyone who deals with business, management and financial reporting

### Customisation:

The programme will be further customised to fit your priorities through the pre-course questionnaire (PCQ).

### Internal Training:

This programme is available as an internal training. Email us to find out more at: [alvin.yong@olygen.com](mailto:alvin.yong@olygen.com)

### Estimated Time Schedule

0830 – 0900	Registration
0900 – 1030	First Morning Half
1030 – 1045	Morning Break
1045 – 1230	Second Morning Half
1230 – 1330	Lunch
1330 – 1500	First Afternoon Half
1500 – 1515	Afternoon Break
1515 – 1700	Second Afternoon Half

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### Programme Agenda

#### Session 1: INTRODUCTION

- Overview of training aim, objectives and agenda

#### Session 2: POWER BI CLOUD SERVICE

- Cloud service overview
- Importing report into the cloud service
- Dashboard flow and navigation
- Power BI for mobile
- Natural language queries
- Quick insights
- Content packs
- Publish to web (embedded)
- Export to PowerPoint

#### Session 3: POWER BI DESKTOP

- Overview of Power BI desktop
- Similarities to Excel Power Pivot
- Similarities to Excel Power Query
- Technical options & settings
- Monthly updates

#### Session 4: IMPORTING AND TRANSFORMING DATA

- Importing data from various sources
- Using DirectQuery
- Query editor overview
- Understanding query design & the ETL process
- Query building best practice
- Understanding applied steps
- Data transformations
- Cleaning data
  - » Merging datasets
  - » Unpivoting data
  - » Combining files from a folder
  - » Appending datasets
- Using a dynamic fiscal calendar table
- Creating parameters

#### Session 5: DATA MODELLING

- Creating relationships
- Bidirectional relationships
- Default summarisation
- Custom sorting of columns
- Data types and formatting
- Creating data synonyms

#### Session 6: REPORT BUILDING

- Build a time intelligence report
- Report layout guidelines
- Understanding DAX syntax
- Implicit vs explicit measures
- Base measures and metrics
- Commonly used DAX functions
  - » Sum, average
  - » Time intelligence (MTD, QTD, YTD, Prior year)
  - » Calculate and filter context
  - » Filter, All
  - » IF, HasOneValue
  - » Switch

- » Divide
- » UserRelationship
- » Selected Value

- Optimising measures for self-service BI
- Using quick measures
- **Exercise: Build a Monthly Trend Report**
- How to slice by measure
- Dynamic headings & dates
- Types of slicers and filters
- Understanding KPI cards
- Using field, format, analytics pane
- **Exercise: Build a Tabular Report (Matrix)**
- Types of conditional formatting

#### Session 7: REPORT FUNCTIONALITY

- Drill-downs and drill-through
- Slice by relative dates
- Focus mode - see details
- Setting visual interactivity
- Exporting data from Power BI desktop
- Using Power BI desktop quick insights
- Handling multiple relationships with the fact table
- **Exercise: Build a Shipped Date Report**
- Building reports using Q&A

#### Session 8: REPORT VISUALISATIONS & DESIGN

- Choosing visuals based on context
- Native & custom visuals
- Optimising bullet, scatter, ribbon & water charts
- Adding tool tips
- Types of conditional formatting
- Custom page sizing
- Logo & icons
- Shapes and borders
- Formatting tips & tricks
- Best practice guidelines and development tips

#### Session 9: GOVERNANCE & DISTRIBUTION

- Row level security - creating and testing roles
- Publishing to the cloud service
- Security - add users to defined roles
- Sharing dashboards & reports
- Creating app workspaces and publishing apps
- Adding users and editing workspaces
- Publishing apps
- Organisational content pack

#### Session 10: DATA REFRESHING

- Overview of the data gateway
- Scheduling data refreshes
- Refreshing on-demand

Throughout the workshop, participants will work through practical exercises to enhance their knowledge of the tools available to build Power BI dashboards and reports

# REGISTRATION

OLYGEN SDN BHD | TEL: +65 6631 9763

Contact: Alvin Yong

Email: [alvin.yong@olygen.com](mailto:alvin.yong@olygen.com)

## Power BI Dashboard & Report Masterclass

REGULAR RATE

Kuala Lumpur • 29-30 October 2018

RM 3,999

Penang • 1-2 November 2018

RM 3,999

\*Fees include course documentation, luncheon and refreshments. Delegates are responsible for their own accommodation.

Organisation : \_\_\_\_\_  
Invoice Attention To : Mr/Ms/Mrs: \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
Address : \_\_\_\_\_  
Telephone : \_\_\_\_\_ Fax: \_\_\_\_\_

### DELEGATES' DETAILS

Name	: Mr/Ms/Mrs: _____	Name	: Mr/Ms/Mrs: _____
Job Title	: _____	Job Title	: _____
Mobile Number	: _____	Mobile Number	: _____
Email	: _____	Email	: _____
Diet Preference	: None/Vegetarian/Halal/Others: _____	Diet Preference	: None/Vegetarian/Halal/Others: _____

Name : Mr/Ms/Mrs: \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Mobile Number : \_\_\_\_\_  
Email : \_\_\_\_\_  
Diet Preference : None/Vegetarian/Halal/Others: \_\_\_\_\_

### PAYMENT BY CREDIT CARD

VISA/MASTER - You will be sent a Payment Link to pay online  
Card Type : AMEX  
Card No. : \_\_\_\_\_  
Expiry : \_\_\_\_\_ (MM/YYYY)  
Name : \_\_\_\_\_  
Signature : \_\_\_\_\_

\* 3.5% surcharge applies for credit card payment

### AUTHORISATION

Name : Mr/Ms/Mrs: \_\_\_\_\_  
Title : \_\_\_\_\_  
Signature : \_\_\_\_\_  
Date : \_\_\_\_\_

### PAYMENT BY BANK TRANSFER

**BANK TRANSFER**  
**Olygen Sdn Bhd**  
Malayan Banking Berhad  
Bank Address: Level 1, Tower A, Dataran Maybank, 59000 Kuala Lumpur, Malaysia  
MYR Account No: 514253-508779  
Swift Code: MBBEMYKL

### TERMS & CONDITIONS

Payment Terms: Payment is required within 7 days of invoice date. Olygen reserves the right to refuse admission IF payment is not received before the event date. Transfer: Transfer is allowed upon written notification. Cancellation: Registration carries a 50% cancellation liability, notwithstanding, full fee is payable when cancellation is less than two (2) weeks before the event. Cancellation has to be done in writing. If Olygen decides to cancel or postpone this event, it is not responsible for covering airfare, hotel, or other travel costs incurred by clients. The fee will not be refunded, but credited to a future event. No Show: No show does not constitute transfer or cancellation and the full fee is payable. Changes: Olygen reserves the right to change event dates, venue, speakers, or omit event features, or merge the event with another event, as it deems necessary without penalty, refunds or alternative offers. Tax: Registration fees exclude tax. For clients outside Malaysia, the sum payable is as the listed fees, exclusive of tax. To this sum shall be added any other local tax or withholding tax from client's country of origin, if any. Marketing: Olygen may use your company's logo or business name or otherwise refer to your company in our website, any marketing, promotional or advertising material as a client of our services. Governing law: This Agreement shall be governed and construed in accordance with the law of Malaysia and the parties submit to the exclusive jurisdiction of the Malaysian Courts in Malaysia. Indemnity: Should for any reason outside the control of Olygen, the event be cancelled due to an act of terrorism, extreme weather conditions or industrial action, Olygen shall endeavour to reschedule but the client hereby indemnifies and holds Olygen harmless from and against any and all costs, damages and expenses, including attorney's fees, which are incurred by the client.