Power BI Data Analyst Workflow and Governance Course

22 March – 2 April 2027
Montreux

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Ref: 854_164587 **Date:** 22 March – 2 April 2027 **Location:** Montreux **Fees:** 15000 Euro

Overview

Power BI Data Analyst Workflow and Governance Course is a two-week course for data analysts, business intelligence professionals, reporting specialists, and managers who leave with a Governed Power BI Delivery Pack. Participants connect requirements, Power Query preparation, semantic modeling, DAX, report design, workspace controls, security, refresh, performance, and release evidence. The course addresses disconnected development, unclear ownership, unreliable refresh, and uncontrolled distribution through a traceable delivery workflow. Agile Leaders Training Center develops Power BI data analyst workflow and governance practice.

Who Should Attend

- Data analysis functions responsible for preparing, modeling, interpreting, and presenting business data
- Business intelligence functions responsible for semantic models, measures, reports, workspaces, and releases
- Reporting functions responsible for recurring performance information and stakeholder requirements
- Technology functions responsible for connectivity, gateways, access, refresh, and operational support
- Data governance functions responsible for ownership, quality, security, lineage, and controlled distribution
- Management functions responsible for defining questions and reviewing analytical evidence

The course assumes participants can work with tables, calculations, business measures, and basic Power BI navigation; it leaves out introductory computer skills, database administration, software licensing, and certification preparation.

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Departments and Industries

The course supports departments and industries that deliver governed self-service analytics and recurring reports.

- Business intelligence, analytics, reporting, and data governance
- Finance, operations, supply chain, and commercial management
- Technology, telecommunications, energy, and manufacturing
- Healthcare, education, professional services, and public services
- Audit, risk, project management, and performance management

Learning Objectives

By the end of this course, participants will be able to:

- Analyze stakeholder requirements and source readiness for Power BI delivery.
- Build repeatable Power Query preparation and quality controls.
- Apply semantic modeling and DAX methods to business measures.
- Use report-design and accessibility practices for interactive analysis.
- Evaluate workspace, security, refresh, and performance controls.
- Build a governed release and support workflow for Power BI assets.

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Course Agenda

Day 1: Define the Analytics Product

- Decision Question and Stakeholder Requirement Canvas
- Source System and Data Ownership Map
- Business Measure Definition Register
- Power BI Delivery Lifecycle Diagram
- Analytics Product Scope and Acceptance Brief

Day 2: Profile and Connect Data

- Connector Selection and Credential Planning Matrix
- Column Profile, Distribution, and Quality Review
- Data Type, Locale, and Format Validation Checklist
- Query Dependency and Source Lineage Map
- Source Risk and Refresh Feasibility Assessment

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Day 3: Prepare Data with Power Query

- Power Query Applied Steps and Transformation Log
- Filter, Split, Merge, Append, and Pivot Method
- Parameter and Reusable Query Design Pattern
- Error, Null, Duplicate, and Exception Handling Rules
- Staging Query Structure and Load-Control Plan

Day 4: Build the Semantic Model

- Star Schema Fact and Dimension Design
- Relationship Cardinality and Filter Direction Matrix
- Date Table and Role-Playing Dimension Pattern
- Hierarchy, Sort, Format, and Metadata Specification
- Semantic Model Integrity and Ambiguity Test

Day 5: Develop DAX Measures

- DAX Measure and Calculated Column Decision Guide
- Filter Context and Row Context Trace Method
- CALCULATE and Context Transition Analysis
- Time Intelligence Comparison Measure Pattern
- Measure Table, Naming, and Documentation Standard

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Day 6: Design Analytical Reports

- Visual Selection and Analytical Relationship Matrix
- Report Page Grid and Attention Sequence
- KPI, Trend, Variance, and Exception Display Pattern
- Filter, Slicer, Bookmark, and Drillthrough Specification
- Tooltip, Commentary, and Narrative Writing Guide

Day 7: Build Accessible Interactions

- Color Contrast and Noncolor Cue Checklist
- Alternative Text and Reading Order Review
- Keyboard Navigation and Focus Sequence Test
- Mobile Layout and Responsive Use Wireframe
- Usability Test Script and Feedback Log

Day 8: Publish and Secure Assets

- Workspace Role and Content Ownership Matrix
- Semantic Model, Report, Dashboard, and App Publishing Flow
- Row-Level Security Role Design and Test Cases
- Refresh Schedule, Gateway, and Failure Response Plan
- Sharing, Endorsement, and Distribution Control Checklist

Day 9: Govern and Optimize Delivery

- Model Size and Cardinality Diagnostic Review
- DAX and Visual Query Performance Inspection
- Usage and Adoption Metric Monitoring Board
- Change, Version, and Deployment Path Control
- Governance Gate and Release Readiness Checklist

Day 10: Practice Governed Delivery

- Exercise: Repair Source Quality and Query Dependencies
- Exercise: Diagnose Model Relationships and DAX Results
- Exercise: Redesign Report Interaction and Accessibility
- Exercise: Validate Security, Refresh, and Release Controls
- Capstone: Governed Power BI Delivery Pack

Practical Exercises

The course uses suggested activities based on finance, operations, service, and performance-reporting data.

- Suggested activity: profile mixed sources, document ownership, apply transformations, and build controlled staging queries.
- Suggested activity: construct a star schema, validate relationships, and develop documented DAX measures for defined metrics.
- Suggested activity: design interactive, accessible report pages and test navigation, filters, tooltips, and mobile layout.
- Suggested activity: publish a governed solution with roles, refresh controls, performance evidence, release gates, and handover records.

FAQs

Who suits Power BI data analyst workflow and governance training, and what does it assume?

Data analysis, business intelligence, reporting, technology, governance, and management functions suit the training. It assumes familiarity with tables, calculations, business measures, and basic Power BI navigation.

How does Power BI workflow and governance training differ from dashboard design training?

Power BI workflow and governance training covers preparation, modeling, DAX, reports, accessibility, publishing, security, refresh, optimization, governance, and handover. Dashboard design training concentrates on visual layout and communication.

Why does a Power BI semantic model use a star schema?

A star schema separates measurable events from descriptive dimensions, clarifies relationships, supports reusable filtering, reduces ambiguity, and provides a stable structure for measures and reports.

What is the difference between a DAX measure and a calculated column?

A DAX measure calculates a result within the current query context, while a calculated column stores a row-level result during model processing and increases model size.

How should organizations govern Power BI assets after publication?

Governance assigns owners, roles, refresh controls, security tests, endorsement rules, usage monitoring, release evidence, support paths, and recurring review for models, reports, dashboards, and apps.

Conclusion

Participants take back a Governed Power BI Delivery Pack containing requirements, source profiles, query logs, a semantic model, DAX measures, report specifications, accessibility tests, workspace roles, security cases, refresh controls, performance evidence, release gates, and handover records. It changes isolated report building into a controlled delivery cycle. The pack supports repeatable development, publication, adoption, and governance.