Power BI End-to-End Report Delivery Training Course

29 March – 2 April 2027
Montreux

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Ref: 861_165105 **Date:** 29 March – 2 April 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Power BI End-to-End Report Delivery Training Course is a one-week course for business users and new analysts who leave with a Controlled Report Delivery Pack. Participants move a reporting request through source intake, Power Query preparation, model checks, calculations, visual assembly, publication, and handover. The course addresses broken ownership and undocumented delivery decisions with a traceable workflow and acceptance controls. Agile Leaders Training Center develops Power BI report delivery practice.

Who Should Attend

- Business reporting functions responsible for converting operational questions into recurring reports
- Analysis support functions responsible for preparing sources and checking report outputs
- Operations functions responsible for supplying data and accepting delivered reports
- Finance and sales functions responsible for reviewing measures and period results
- Digital support functions responsible for publication, access, refresh, and handover records

The course assumes participants can use spreadsheets and interpret charts; it leaves out advanced DAX, enterprise architecture, administration, and performance optimization.

Departments and Industries

The course supports departments and industries that need controlled delivery of recurring Power BI reports.

- Finance, sales, procurement, operations, and human resources
- Retail, logistics, manufacturing, and hospitality
- Healthcare, education, utilities, and infrastructure
- Technology, telecommunications, and professional services

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Learning Objectives

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

- Use an intake canvas to define report purpose and acceptance criteria.
- Apply Power Query steps to prepare and document source data.
- Build a basic model with relationships and measures.
- Analyze report usability through visual and filter tests.
- Evaluate publication, access, refresh, and handover controls.
- Build a controlled report delivery pack.

Course Agenda

Day 1: Define Report Delivery

- Reporting Request and Acceptance Canvas
- Audience Decision and Action Map
- Source Owner and Access Register
- Report Scope and Exclusion Checklist
- Delivery File and Version Structure

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Day 2: Prepare and Trace Data

- Power Query Source Connection Log
- Column Type and Quality Profile
- Error, Blank, and Duplicate Treatment Rules
- Applied Steps Naming and Documentation Guide
- Source-to-Query Traceability Sheet

Day 3: Model and Calculate

- Fact and Lookup Table Classification
- Relationship Cardinality and Direction Test
- Core DAX Measure Definition Card
- Filter Context Behavior Check
- Model-to-Source Reconciliation Record

Day 4: Assemble and Release

- Page Purpose and Visual Selection Grid
- Layout, Alignment, and Reading Order Check
- Slicer and Cross-Filter Interaction Test
- Power BI Service Publication Checklist
- Access, Refresh, and Handover Register

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Day 5: Practice Report Delivery

- Exercise: Repair an Undocumented Query Sequence
- Exercise: Diagnose a Relationship and Measure Error
- Exercise: Test Visual and Filter Acceptance Criteria
- Exercise: Complete Publication and Handover Controls
- Capstone: Controlled Report Delivery Pack

Practical Exercises

The course uses suggested activities based on sales, service, workforce, and operational reporting requests.

- Suggested activity: define acceptance criteria, owners, sources, and exclusions for a recurring report request.
- Suggested activity: prepare a source through Power Query and document each treatment decision.
- Suggested activity: build relationships and measures, then reconcile results to source totals.
- Suggested activity: test visuals, publish the report, and complete access, refresh, and handover records.

FAQs

Who suits Power BI report delivery training, and what does it assume?

Business users, new analysts, reporting support teams, and report owners suit the training. It assumes spreadsheet experience and the ability to interpret basic charts.

How does Power BI report delivery training differ from advanced Power BI analytics?

Report delivery training focuses on a controlled beginner workflow from intake to handover, while advanced analytics adds complex DAX, larger models, performance work, and specialized analytical techniques.

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What makes a Power BI report ready for delivery?

A report is ready when sources, transformations, relationships, measures, visuals, filters, access, refresh ownership, and acceptance evidence have been checked and recorded.

How should a Power BI report be handed over?

A report should be handed over with its purpose, owners, source register, refresh method, access decisions, measure definitions, acceptance results, and change record.

How are Power BI report figures checked before publication?

Figures are checked by reconciling source totals, testing relationship behavior, reviewing filter combinations, inspecting missing values, and recording exceptions before release.

Conclusion

Participants take back a Controlled Report Delivery Pack containing intake evidence, query records, model checks, measures, report pages, acceptance tests, and handover controls. It changes report building from an isolated file task into a traceable delivery sequence. The pack supports repeatable checking, publication decisions, refresh ownership, and controlled changes.