Getting started with Power BI and Copilot in M365

Duration – 4 hours

Overview

This introductory course provides a practical overview of Power BI and Copilot in Microsoft 365 for beginners. Participants will learn how to connect to data, create basic reports, and understand key data visualization concepts using Power BI. The course also introduces Copilot capabilities across Microsoft 365 applications, demonstrating how AI can support data analysis, content creation, and everyday productivity tasks. Through guided demonstrations and real-world examples, attendees will gain a clear understanding of how these tools work together to support informed decision-making and more efficient ways of working.

Audience Profile

This course is intended for professionals who are new to Power BI and Copilot in Microsoft 365 and want to build a foundational understanding of data analytics and AI-enabled productivity tools. It is suitable for business users, analysts, managers, and knowledge workers across functions who regularly work with data, reports, or Microsoft 365 applications. Prior experience with Power BI or Copilot is not required; however, basic familiarity with Excel or other Microsoft tools will be beneficial. The course is designed for learners seeking practical, easy-to-understand guidance rather than deep technical or development-focused training.

Course Syllabus,

- **Module 1 – Basics of Power BI**
    - Concept of business Intelligence
    - Introduction to Power BI
    - Components of Power BI
    - Features and Capabilities of Power BI
    - Introduction to Data lifecycle
    - Performing ETL with Power BI

- **Module 2 – Connecting and Transforming Data**
    - Using Power Query Editor to Ingest data
    - Brining Data from multiple sources
    - Merging and Appending Queries

- **Module 3 – Model Data & DAX**
  - Common data modelling techniques
  - Establishing relationships in data
  - Creating hierarchy
  - Introduction to DAX
  - Creating Calculated Tables and Calculated Columns
  - Creating Measures

- **Module 4 – Visualize Data**
  - Report creation
  - Selecting and using appropriate visuals
  - Components of the visualization pane
  - Using AI Based Visuals
  - Creating Mobile view for the reports

- **Module 6 – Manage Data**
  - Publishing Report to Power BI Workspace
  - Create Dashboard using multiple reports
  - Formatting dashboard and setting up mobile view for dashboard
  - Creating Report and Dashboard subscriptions

- **Module 6 – Copilot in M365**
  - What is Copilot and How it works
  - What copilot generate responses and Content
  - Using Copilot in Productivity tools like Outlook, Work, Excel and Power Point
  - What copilot offers in Teams