

POWER BI DESKTOP

CHEAT SHEET

Master Power BI here: bit.ly/pbi-training



- Report View
- Table View
- Model View

Report View Task Panes

Build, Format & Filter Visuals

Task Panes
Tip: Hold CTRL to pin them open

Home tab

Load, Manage, Combine Queries, Data Source Settings & Some Transformations

Copy, Paste, Format **Get Data** **Power Query** **Insert Visuals/Charts** **Add Measures** **Sensitivity Labels**

Insert tab

New Page, Visuals, Power Platform, Elements & Add Sparklines

Insert Pages **Insert Visuals/Charts** **Get Custom Visuals** **Insert AI Visuals** **Work with Power Platform** **Insert Text Boxes, Buttons, Shapes, & Images** **Insert Sparklines**

Modeling tab

Manage Relationships & Calculations

Relationships **New Measures & Tables** **Direct Query Refresh** **Parameters** **Row Level Security** **Set Up Q&A**

Optimize tab

Refresh **Presets** **Performance** **Slicer Perf.**

Format tab

Control Cross Filter & Highlight **Arrange Visuals & Objects**

Table View Task Panes

Properties & Formatting

Set Column/Table Properties & Formatting **Table and Field List**

View tab

Themes, Page View & Mobile Layout

Set Color Themes **Scale & Layout** **Grid Options** **Show / Hide Task Panes**

Measure tools

Structure, Formatting & Properties

Measure Name & Data Type **Formatting** **Formula Bar** **Data Category** **Add Measure**

Column tools

Structure, Formatting, Properties & Sort

Column Name & Data Type **Column Formats** **Default Summarization & Category** **Sort Column by Another** **Group Fields** **Manage Relationships** **Add Calculated Column**

Footer

Layout, Pages, Zoom In/Out, Settings

Scroll Pages **New Page** **Settings**
Mobile / Desktop Layout **Page Tab** **Zoom In/Out** **Fit to Page**

Mynda Treacy, SKILLS THAT GET YOU NOTICED AND PROMOTED

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