MERCURY

Basic Power BI for HR Professionals

19 – 23 July 2027
Madrid (Spain)



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Basic Power BI for HR Professionals

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Introduction

The Basic Power BI for HR Professionals course builds a strong foundation in using business intelligence for human resources reporting and analysis. It introduces HR professionals to Power BI concepts, data preparation, visualization, basic data modeling, and dashboard development. Participants will learn how to transform employee, recruitment, payroll, attendance, and training data into meaningful workforce insights. The program emphasizes practical HR reporting concepts while maintaining a clear theoretical understanding of data structures, metrics, relationships, and visualization principles. Participants will explore how Power BI can support evidence-based workforce decisions, improve reporting clarity, and strengthen HR analytics capabilities. Learners will learn to interpret and communicate HR data through structured, interactive Power BI reports.

Targeted Groups

This Basic Power BI for HR Professionals training targets professionals seeking knowledge and skills:

- HR professionals who need clearer workforce reporting.
- HR managers who monitor employee and organizational KPIs.
- HR analysts who want practical data visualization skills.
- HR business partners who support evidence-based decisions.
- Recruitment specialists who analyze hiring pipelines and trends.
- Learning professionals who evaluate training participation and outcomes.
- Payroll teams who review workforce cost and salary patterns.
- Talent professionals who examine retention, turnover, and workforce trends.

Course Objectives

Participants will achieve the following objectives by completing the Basic Power BI for HR Professionals course:

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- Explain the role of Power BI in HR reporting and workforce analytics.
- Identify suitable HR data sources for business intelligence reporting.
- Navigate Power BI Desktop and recognize its core working areas.
- Prepare employee datasets for reliable analysis and visualization.
- Apply basic Power Query techniques to clean and organize HR data.
- Build simple relationships between employee, recruitment, payroll, and attendance tables.
- Select appropriate visuals for common HR metrics and reporting questions.
- Create basic measures for headcount, turnover, absence, and workforce composition.
- Develop interactive HR dashboards using filters, slicers, cards, and charts.
- Interpret dashboard results and identify meaningful workforce patterns.
- Present HR insights clearly for managers and business stakeholders.
- Apply basic data-quality and confidentiality principles when handling employee information.

Targeted Competencies

Participants will gain the following competencies during the Basic Power BI for HR Professionals program:

- Power BI interface navigation.
- HR data preparation and organization.
- Basic Power Query transformation.
- Workforce data visualization.
- HR KPI selection and interpretation.
- Simple data modeling and relationships.
- Basic DAX measure awareness.
- Interactive dashboard design.
- Recruitment and turnover reporting.
- Employee data quality assessment.
- Analytical storytelling for HR stakeholders.
- Evidence-based workforce reporting.
- HR dashboard planning.
- Basic workforce trend analysis.
- Recruitment funnel visualization.
- Employee turnover analysis.
- HR report presentation.
- Data-informed management communication.

Real-world Case Studies

In this Basic Power BI for HR Professionals training, participants develop skills through the following cases:

- Analyze monthly headcount changes across departments.
- Review recruitment funnel data to identify hiring bottlenecks.
- Examine turnover patterns by tenure, department, and employee group.
- Compare absence trends and workforce availability across periods.
- Present a basic HR dashboard that converts employee data into management insights.

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Course Content

Unit 1: Foundations of Power BI for HR

- Define business intelligence in HR.
- Explain Power BI for HR decisions.
- Identify common HR reporting challenges.
- Review Power BI Desktop and reports.
- Explore visuals, fields, and filters.
- Distinguish reporting from HR analytics.
- Identify key HR metrics and dimensions.

Unit 2: HR Data Sources and Data Preparation

- Identify common HR data sources.
- Connect Excel and CSV files.
- Review employee and payroll data.
- Examine missing and duplicate data.
- Introduce Power Query for HR data.
- Remove unnecessary rows and columns.
- Rename fields consistently.
- Standardize dates and HR categories.

Unit 3: Basic HR Data Modeling and Measures

- Explain tables, fields, and records.
- Identify keys and data relationships.
- Distinguish fact and dimension tables.
- Create basic HR data relationships.
- Understand one-to-many relationships.
- Examine model accuracy and structure.
- Introduce calculated columns and measures.
- Explore basic DAX for HR analytics.

Unit 4: HR Data Visualization and Dashboard Design

- Match visuals with HR questions.
- Use cards for key HR metrics.
- Compare departments with bar charts.
- Track trends with line charts.
- Present details using tables and matrices.
- Add slicers for workforce analysis.
- Apply filters to employee groups.
- Organize clear HR dashboard layouts.

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Unit 5: HR Analytics, Interpretation, and Reporting

- Analyze headcount and workforce metrics.
- Review recruitment and turnover trends.
- Examine absence and training data.
- Identify workforce trends and gaps.
- Compare results across departments.
- Support workforce planning decisions.
- Communicate HR insights clearly.
- Apply data-quality and confidentiality principles.

Final Insights & Key Takeaways

Power BI provides HR professionals with a structured approach to analyzing workforce data and creating meaningful reports. Participants develop foundational skills in HR analytics, dashboard design, data visualization, and workforce reporting.