

**Excel BI – 1 day**



**Overview**

This one day intensive workshop will provide you with the knowledge to make best use of Excel's Business Intelligence tools to mash up, analyse and visualise your data

**Objectives**

By the end of this course you will be able to use Excel PowerPivot tools confidently and be able:

- Create a PowerPivot model by importing data from various sources
- Understand and manage data relationships
- Create and edit hierarchies
- Insert calculated columns using Data Analysis Expression (DAX) formulas
- Insert, modify, and format PivotTables and PivotCharts
- Create and edit Measures (DAX aggregate functions)
- Create report dashboards using slicers, timelines and KPIs
- Use PowerView, PowerMaps and Power Query tools

**Prerequisites**

It is recommended that you have completed either the Excel Intermediate or Excel Advanced level workshops, or have equivalent experience. It is expected that you have a good understanding of Excel functions such as IFs and VLookups and a basic understanding of PivotTables.

**Exercises**

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

**TOPICS**

**Introduction to PowerPivot**

- What is PowerPivot for Excel and how is it different to PivotTables?
- What are the differences between Excel 2013 and 2016 PowerPivot tools?
- How do I create a PowerPivot Data Model by importing data from sources including Access databases, Excel and Text files?
- What other data sources can I import into the model?
- What data types does PowerPivot support and how does this impact my existing data
- How do I create table relationships and why this is important?
- How do I create a Date Table and why this is important?

**Tips for preparing data using Power Query and Excel formulas**

- Use Power Query to import data into the Data Model
- Save and work with 'Steps'
- Transpose data to swap rows and columns
- Fill data down to populate missing values
- Unpivot columns to flatten a "cross tab" table
- Use Text Functions to clean and trim data

**The PowerPivot interface**

- Open an existing model
- Rename a Table or Column
- Hide or Freeze Columns
- Sort and filter data in the model
- Create Hierarchies
- Refresh data
- Edit the data source

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**Creating and formatting PivotTables and Charts with PowerPivot**

- Insert PivotTables and Charts using different PowerPivot layouts
- Use Slicers and Timelines to Filter Data and connect these to more than one PivotTable
- Use Charts, Slicers, Timelines and conditional formatting to create interactive Dashboards

**Introduction to DAX Formula and KPIs**

- Creating Calculated Columns & Calculated Fields
- Implicit and Explicit Calculated Fields
- Using DAX aggregate functions in a PowerPivot PivotTable
- Creating some useful DAX functions and using them to create KPIs

**PowerView and Power Map**

- The PowerView Field List
- Using Text Boxes
- Creating Tables
- Changing Table Visualisations
- Using a Matrix and Enable Drill Down
- Using Cards; Setting up Titles and Pictures for Cards
- Creating Chart Visualisations and Interactive Charts
- Creating PowerView Slicers
- Using Tiles
- Using PowerView Filters
- Working with the Power Map tools