4D Training

Excel Power Pivot Workshop
(versions 2013 & 2016)

Who would benefit?

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. This hands-on course is instructor led with lots of practical examples and exercises. Delegate numbers are kept small in order to ensure you get personal attention throughout the day.

Objective

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

- Create a Power Pivot 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 Power View, Power Maps 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 Pivot Tables.

Content

Introduction to Power Pivot

We start this session with an overview of the Excel BI tools and ensure that you know how to enable them. We look at the data we will be using to create the Power Pivot reports throughout the day and answer the following:

- What is Power Pivot for Excel and how is it different to PivotTables?
- What are the differences between Excel 2013 and 2016 Power Pivot tools?
- How do I create a Power Pivot 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 Power Pivot 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

In order to use Power Pivot effectively, data needs to be in the correct format. In this part of the workshop we share tips on how to:

- Use Power Query to import data into the Data Model
- Save and work with 'Steps'
- Transpose data to swap rows and columns   *(continue to page 2)*

- Fill data down to populate missing values
- Unpivot columns to flatten a "cross tab" table
- Use Text Functions to clean and trim data

The Power Pivot interface

It is important that you can use the Power Pivot tool effectively and know how to how to:

- 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

Creating and formatting Pivot Tables and Charts with Power Pivot

During this part of the workshop you learn how to:

- Insert Pivot Tables and Charts using different Power Pivot 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

This session is an overview of Data Analysis Expressions (DAX) formula language and covers:

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

Power View and Power Map

The workshop finishes with a brief overview of Power View and Power Map (known as 3D maps in Excel 2016); topics include:

- The Power View 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 Power View Slicers
- Using Tiles
- Using Power View Filters
- Working with the Power Map tools

Duration

One day