Using Excel PivotTables, Power Pivot and Power Query to Analyze Data

Length/CPE Hours

14 hours (2 days)

Class Time

Day 1 - 8:30 a.m. – 4:15 p.m. Central Time
Day 2 - 8:30 a.m. – 4:15 p.m. Central Time

One-hour break for lunch and a 15-minute morning and afternoon break.

Course Description

Many advanced Excel users such a Mr. Excel have called Power Pivot the Best Thing to Happen to Excel in 20 Years. Class will begin with a quick overview or refresher on how to create a Table and a basic PivotTable. We will then move into more advanced PivotTable topics such as creating Measures, Calculated Fields, and Calculated Items. And we will look at PivotTables settings.

Next, we will learn how to take multiple tables, add them to Excel's Data Model, relate them and then create a Power Pivot. We will look at the Get and Transform feature also called Power Query. Power Query is often called a self-service Business Intelligence (BI) tool. In newer versions of Excel, Power Query has been renamed Get & Transform because it allows you to connect to a source, combine and clean up data and then analyze the data.

We will learn how to write formulas both in Power Query and the Data Model. Many of these formulas will be like what you have used in Excel. However, these formulas have a different structure and are often more powerful and work better with large data sets. And a major advantage is the ability to get new data or change data and then simply refresh your query. If you write formulas using a VLOOKUPS, INDEX, and MATCH or IF statement in Excel, with large data sets you will be amazed at the speed of these newer features. And if you write macros to clean up data, you might find these new features will work much better than a macro.

CREATING TABLES AND PIVOTTABLES REFRESHER

- Best Practices for Arranging Data for use with Tables or PivotTables

- Understand the difference between Filtering data and using Tables

- Learn the power of Tables

- PivotTables Basics

- Learn to Refresh and Modify PivotTables

- Work with Slicers and Understand How Slicers can help with Dashboards

- Understand PivotTable Cache

- Work with PivotTable Timelines

INTRODUCTION TO POWER PIVOT

- What is Power Pivot

- Importing Tables into the Data Model

- Linking Tables

- Using the Related() Function

- Basic Calculations in the Data Model

- Creating a PivotTable using Multiple Data Sheets

POWER QUERY aka GET AND TRANSFORM

- What is Power Query and where is it located in 2013, 2016 and Office 365

- Types of Data Connections and Power Query Editor Window

- Review and Change Data Types

- Loading to the Data Models

- Data Specific Editing Tools such as Text, Numbers, and Date Tools

- Filling Data Up and Down

- Splitting and Combining Columns of Data

- Adding Conditional Columns

- UnPivoting Data

- Merging Data and working with Joins

- Appending Multiple Data Sets

A BREIF LOOK AT POWER PIVOT DAX FUNCTIONS

- Creating a Measure using AutoSum

- Deleting a Measure

- Working with the New Measures Dialog Box

- Understanding DAX Syntax

- DAX Operators

- DAX Functions such as COUNT ROWS AND COUNTA

- Logical DAX Functions like IF, OR, AND

PREREQUISITE

Excel to the Max or equivalent knowledge is the prerequisite for this class

EXCEL VERSIONS

EXCEL 2013, 2016 or Office 365. The curriculum will show you how to perform a task in Excel 2013, 2016 or Office 365. If you have Excel 2010, you will be limited in what you will be able to do after class.

Who Should Attend?

In this class, we will learn how to use the Excel features called Get and Transform also called Power Query. This class will teach you how to use data from multiple Excel spreadsheets, database tables, CSV files or other sources, transform it and then analyze the data. We will also review PivotTables and learn how to create more advanced PivotTables called Power Pivots. If you are an Intermediate to Advance Excel users would like to expand your knowledge of Excel this class is for you.

Cancellation Deadline

The cancellation deadline is 5 business days prior to the class. If you are unable to attend, you may send a substitute. If you are a "no show" or you do not send a substitute you will be charged full price for the class.

Cloud Training Services will consider emergency situations such as a death in the family, illness, and weather, and will make every attempt to work with the person in the event of an emergency