EXCELERATING YOUR FINANCIAL INTELLIGENCE

Power Query and Power Pivot for Modern Excel and Power BI Desktop (1 day or 2 day courses)

ACCESS ANALYTIC

Good decisions are made when data is converted into meaningful information

What are Microsoft Power Query and Power Pivot?

Plain Speaking:

On our **Power Query** page we described Power Query as the world's greatest washing machine that is capable of taking data from multiple locations and cleaning it up ready for analysis. **Power Pivot** is then the world's greatest data wardrobe, capable of connecting this clean data together ready for display.

Technical Talk:

Power Query is a powerful **ETL** utility built into Excel 2016 designed to **E**xtract data from multiple sources, **T**ransform the data into a layout suitable for analysis and then **L**oad it into Excel Tables or Power Pivot.

Power Pivot is a powerful **Data Analysis Engine** built into Excel 2016 and Excel 2013. Power Pivot is designed to provide fast and flexible reporting. By building calculations (DAX measures) into Power Pivot you can begin to turn your data into actionable information

Key advantages of Power Query and Power Pivot

- Using Power Query you can load your data into Power Pivot as tables of clean data.
- Then you can simply use drag and drop to connect the tables together by their common fields. **NO MORE VLOOKUPS!**
- After all of your data is connected together you can start to create basic measures and KPIs. For example, Variances, Growth rates, Product and Channel Mix, Margins, Profitability, the list is endless.
- In the same way Excel provides formulae as building blocks for complex reporting, so DAX formulae allow you to compose amazing measures to highlight business performance. e.g. these are just two of the hundreds of built in DAX formulas:
  =YEARTODATE
  =SAMEPERIODLASTYEAR
- Once you've mastered those then these DAX formulae open up an endless list of possibilities.

Who Should Attend?

- Excel users & analysts that focus on extracting, re-organizing and analyzing data
- Excel users & analysts involved in creating visualizations & data modelling
- Anyone interested in saving huge amounts of time in automating the work involved in creating recurring reports and dashboards

EXCELERATING YOUR FINANCIAL INTELLIGENCE

Power Query and Power Pivot for Modern Excel and Power BI Desktop (1 day or 2 day courses)

ACCESS ANALYTIC

Pre-Requisites

This is an intermediate course and users should already be comfortable with Excel to get the most from this course.

Participants should be familiar with functions & concepts such as VLOOKUP and SUMIFS.

The course is applicable to Excel 2013 / 2016 and Power BI Desktop but many elements can be applied to Excel 2010 (there is no integration between Power Query and Power Pivot in Excel 2010).

Course Outline

This is a hands-on course focused on real-world techniques utilizing the amazing capabilities of Power Query, Power Pivot and PowerBI.

The 1-day course covers the core elements needed to get an understanding of what Power Pivot and Power Query can do. You will use Power Query to extract and shape data and then load it into Power Pivot. You will build a complex Power Pivot Model from scratch, write DAX formulas and set up interactive reports.

The 2-day course delves deeper into all of the topic areas demonstrating how to get the most from these amazing tools. You will learn advanced features not covered in the 1-day course get a more in-depth understanding of Power Query and Power Pivot reporting techniques.

*The items in bold are only covered in the 2-day version of the course

Power Pivot Introduction

- Creating your first Power Pivot Model
- Mapping tables
- Joining multiple tables together and understanding relationships
- Creating a Calendar Table*
- Utilizing a Calendar Table
- Advanced PivotTable Reporting*
- Pivot Charts*
- Power Map*

In-depth Power Pivot Models

- Creating more complex Power Pivot models
- Calculated Columns
- Introducing DAX formulas and Calculated Fields (Measures)
- Filters and Slicers
- Improve the user experience through Hiding and Hierarchies
- Pitfalls to avoid
- How to build in checks to detect new data or imbalances
- Creating useful time based measures with more advanced DAX formulas
- CALCULATE explained*
- CUBE formula*
- KPIs*

Power Query

- Exploring the User Interface
- Power Query techniques
- How to “un-pivot” data

In-Depth Power Query

- How to merge multiple sources into one table*
- Using variables for query parameters*
- Introduction to the Advanced Editor and M language*
- Creating re-usable custom functions*
- Calendar Creator*

Power BI Desktop & POWERBI.com

- Power BI Desktop
- A comparison with Excel
- An overview of the graphical interface
- Custom Visualizations
- Power BI.com.
- Publishing and Sharing your dashboards

EXCELERATING YOUR FINANCIAL INTELLIGENCE

Power Query and Power Pivot for Modern Excel and Power BI Desktop (1 day or 2 day courses)

ACCESS ANALYTIC

Continuing Education

This course provides 7.5 contact hours per day towards continuing education requirements.

Key Details

Comprehensive course notes plus a thumb drive are included.

Just call us on +61 8 6210 8500 and we'll arrange everything
www.accessanalytic.com.au/training

Facilitator

Wyn Hopkins
Chartered Accountant (ACA), Excel Expert (MOS)

Wyn is a Senior Manager with Access Analytic, an Australian consulting company that develops amazing Power BI and Excel solutions that enable organisations to grow faster, reduce costs and control risk.

Wyn gained his Chartered Accountant qualification at PricewaterhouseCoopers in the UK in 2000.

He has extensive international Business Analyst experience, having worked with a variety of the UK's FTSE 100 financial services companies including Halifax Bank of Scotland (HBOS) and Barclays Bank.

Wyn has specialist knowledge and experience in industry sectors ranging from oil and gas, through to financial services.

Wyn is highly skilled and has completed many successful projects in areas such as:

- Power BI
- Dashboard Development
- Financial analysis
- Management reporting & board packs
- Business budgeting & forecasting
- Excel/ERP systems integration & consolidation
- Financial model auditing

More Information:

https://accessanalytic.com.au/power-bi/