

## Good decisions require good clean data

## Key advantages of Power Query

There is almost limitless potential for Power Query to assist in extracting data from your systems and transforming it into the layout you need. Here are just a few basic examples but highly complex transformations are also possible:

### Extracting:

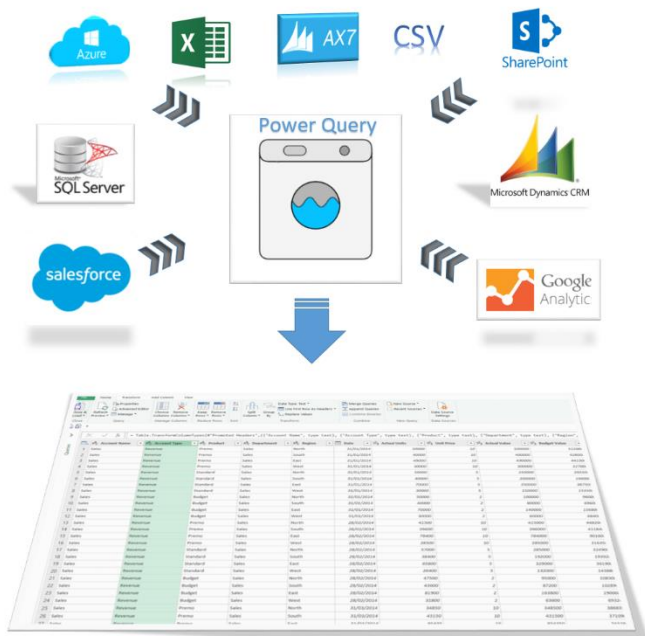
- Link into your accounting system, HR system, Excel files etc. to grab the data you want
- Pull data from different data sources such as AX, Salesforce, CRM Online, Access, Excel, Sequel Server and many more then shape into single or multiple data sets

### Transforming:

- Split complex account structures into separate columns and merge account descriptions with account codes
- Pull data from 50 Excel files then re-arrange the data from those files into a single table
- Consolidate and clean up the data from a single or series of CSV files

### Loading:

- Your clean data can simply be loaded into Excel and then refreshed at the click of a button
- Alternatively, you can load the data into Excel's Power Pivot Model for more advanced data analysis and modelling



## What is Microsoft Power Query / Get & Transform?

**Plain Speaking:** Power Query is the worlds' greatest washing machine! Get all of your "dirty" data from any location, clean it up via a user friendly interface and then load it all neat and folded to a destination of your choice (Excel or Power Pivot)

**Technical Talk:** Power Query is a powerful **ETL** utility built into Excel 2016 (add-in for Excel 2010/2013) designed to **Extract** data from multiple sources, **Transform** the data into a layout suitable for analysis and then **Load** it into Excel Tables or Power Pivot.



# Power Query (Get and Transform) for Excel and Power BI Desktop 1 Day Course



## Who Should Attend?

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

## Pre-Requisites

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

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

The focus is on Excel 2016 and Power BI Desktop but the knowledge gained can be easily applied to Excel 2010 or Excel 2013.

## Course Outline

This is a hands-on course focused on real-world techniques utilizing the amazing capabilities of Power Query (now called Get & Transform in Excel 2016).

This 1-day course covers the core elements needed to get an understanding of what Power Query can do. You will use Power Query to extract and shape data from a variety of sources and data layouts.

You will learn techniques such as Unpivot, Merge and Append that can save hours, even days, of manual effort.

You will learn about the Advanced Editor and how to amend and write M code in order to get more out of Power Query than can be achieved when solely using the user interface.

## Power Query Introduction

- Creating your first Query
- Understanding the Power Query Interface
- Splitting data columns
- Replacing values
- Cleaning out leading spaces
- Joining text together
- Removing unwanted rows and columns
- Understanding Data Types
- Loading data options
- Data source settings
- Refreshing Queries
- Understanding Excel Tables

## In-depth Power Query

- Transforming more complex data sets
- Adding calculated columns
- Consolidate 50 CSV files instantly
- How to “un-pivot” data
- How to join multiple sources into one table
- How to replace VLOOKUPS with “Merge”
- Organising and documenting queries

## Advanced Technique with Power Query and an Introduction to M language

- Creating a mapping check to ensure all your data is mapped correctly
- Using variables for query parameters
- Introduction to the Advanced Editor and M language
- Creating re-usable custom functions
- Setting up a parameter table and a re-usable parameter function
- Calendar Creator
- Techniques for debugging M Code



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## Power BI Desktop

- Illustrating how Power Query is incorporated within Power BI Desktop (Power Query is called Get Data in Power BI Desktop)
- Understanding the differences to Excel
- Understanding when to use Excel and when to use Power BI Desktop

## 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](http://www.accessanalytic.com.au/training)

More Information:

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

## Facilitator

### Wyn Hopkins

*Chartered Accountant (ACA), Excel Expert (MOS)*



Wyn is a Senior Manager with Access Analytic, an Australian consulting company that develops amazing Excel and Power BI 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 modelling