Power BI for Excel – 1 day course

About the course

CMBI's *"Power BI for Excel"* course is aimed at analysts and developers who want to learn how to automate data processing and improve analysis and reporting in Excel using Power BI. The session focuses on teaching you the skills required to build a completely automated end-to-end reporting solution in Excel, to improve efficiency and drive better insight and decision-making in your organisation.

This **1-day course** takes a deep-dive into Power Query, Power Pivot and the next generation of tools in Excel. At the end of the session, you will have all the required skills to automate routine data processing tasks, as well as creating informative reports for your whole team to use.

Who should do this course?

This course is designed for analysts, developers or managers wanting to learn how to develop automated reporting solutions using Power BI in Excel. No prior experience of Power BI is required, although an understanding of Excel Pivot Tables is an advantage.

Delivery Method

CMBI presents each training workshop as a series of practical exercises, giving attendees hands-on experience with personalised one-on-one support in each session.

Training can either be hosted onsite at your premises or remotely, using industry-leading video conferencing software.

Materials and support

CMBI's course materials support learning and re-enforcement well beyond the workshop.

Each session includes an associated set of support materials to help attendees complete the tasks on the day, as well as provide support after course completion:

- Supporting course notes PDF document (approximately 50 pages, printed on request)
- Complete Excel data models for all exercises
- Datasets for all examples
- Optional Q&A time at the end of the session for anyone interested in asking specific questions

How it works

Location: we come to you or host remotely

Duration:
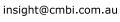1 day, 9am - 5pm (onsite) or
2 x 4 hour sessions (remote)

Price: $1,999 + GST per team

Materials & support:

Each session includes:

- ✓ Supporting course notes PDF document (approx. 50 pages)
- ✓ Excel data models and datasets for all exercises
- ✓ Interactive exercises with personalised support

Course content

Unit 1: Introduction to Power BI in Excel

- ✓ What is Power BI?
- ✓ Understand the different components in Power BI
- ✓ Benefits of using Power BI in Excel
- ✓ Navigating an Excel report built with Power BI
- ✓ The Power BI family:
  Power BI in Excel vs. Power BI Desktop

Unit 2: Extracting Data with Power Query

- ✓ Understand the different ways to get data into Excel
- ✓ What is Power Query?
- ✓ Navigate the Get & Transform ribbon in Excel
- ✓ Load a csv file with Power Query
- ✓ Load an Excel file with Power Query
- ✓ Navigate the Power Query environment
- ✓ Change a query name
- ✓ Add a new transformation step

Unit 3: Transforming Data with Power Query

- ✓ Use first row as headers
- ✓ Change data types
- ✓ Replace values
- ✓ Replace errors
- ✓ Remove top/bottom rows
- ✓ Capitalise each word
- ✓ Transform text to upper or lower case
- ✓ Clean/trim text values
- ✓ Split columns
- ✓ Merge columns
- ✓ Add conditional columns
- ✓ Add index columns
- ✓ Add prefix/suffix to column values
- ✓ Add a comment to a transformation step
- ✓ Rename a transformation step
- ✓ Rename a column

Unit 4: Reshaping Data with Power Query

- ✓ Filter data
- ✓ Group data

Unit 5: Integrating Data with Power Query

- ✓ Merge multiple datasets together
- ✓ Understand the advantages of PQ's Merge function over Excel VLOOKUP
- ✓ Modify data privacy settings
- ✓ View query dependencies
- ✓ View the advanced editor

Unit 6: Loading Data into Excel

- ✓ Explore the Close & Load To… options
- ✓ Load data from Power Query into Excel
- ✓ Disable data load to Excel with 'Only Create Connection'
- ✓ Change the Power Query Data Load options
- ✓ Refresh the data

Unit 7: Introduction to Power Pivot

- ✓ What is Power Pivot?
- ✓ Advantages of using Power Pivot to model data in Excel
- ✓ Load data into a Power Pivot data model
- ✓ Navigate the Power Pivot environment
- ✓ Data view vs. Relationship view
- ✓ Hiding tables/columns in Power Pivot
- ✓ Create a PivotTable or PivotChart from Power Pivot

Unit 8: Relationships

- ✓ Why create relationships?
- ✓ Create a relationship
- ✓ Inspect a relationship
- ✓ Identify the keys in a relationship

Unit 9: Introduction to DAX

- ✓ What is DAX?
- ✓ Understand DAX syntax and common DAX functions
- ✓ Create a calculated column
- ✓ Calculated columns vs. Measures
- ✓ Understand why we need to create measures
- ✓ Create measures using SUM, AVERAGE, COUNTROWS and DIVIDE
- ✓ Create measures using the AutoSum function

Unit 10: Creating an Automated Dashboard in Excel

- ✓ Create a PivotTable and PivotChart from the Power Pivot data model
- ✓ Create and format a Column Chart
- ✓ Create and format a Bar Chart
- ✓ Create and format a Line Chart
- ✓ Create and format a Pie/Donut Chart
- ✓ Create and format Slicers and Timelines
- ✓ Create and format Sparklines
- ✓ Create named ranges in Excel
- ✓ Format data are as a Table
- ✓ Add a Top N filter to PivotTables and PivotCharts
- ✓ Add conditional formatting to reports (data bars, icons)
- ✓ Edit Report Connections to connect a Slicer to multiple data sources
- ✓ Refresh data in PivotTables, PivotCharts and reports

Unit 11: Creating a Corporate Look-and-Feel in Excel

- ✓ Add a corporate logo
- ✓ Add conditional formatting
- ✓ Explore out-of-the-box themes

Unit 12: Preparing an Excel Report for Publishing

- ✓ Remove column and row labels
- ✓ Remove scrollbars
- ✓ Remove gridlines
- ✓ Lock Slicers to prevent against Edit Mode
- ✓ Hide data sheets
- ✓ Protect the workbook from changes