

Introduction to Power Pivot for Excel – 1 day course

About the course

CMBI's "Introduction to Power Pivot for Excel" course is aimed at analysts and developers who want to learn how to create flexible and robust data models to improve analysis and reporting in Excel using Power Pivot. The session focuses on teaching you the skills required to build an end-to-end reporting solution in Excel, to improve efficiency and drive better insight and decision-making in your organisation.

This **1-day course** will take a deep-dive into Power Pivot, showing you how you can use this amazing tool to simplify your existing Excel spreadsheets, as well as be able to design flexible and scalable data models for your future reporting requirements.

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 Pivot in Excel. No prior experience of Power Pivot 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:

- Printed and bound booklet with supporting course notes (approximately 80 pages, depending on selected content)
- 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 - 4pm (onsite) or
2 x 4 hour sessions (remote)

Price: \$1,499 + GST per team

Materials & support:

Each session includes:

- ✓ Printed and bound supporting course notes (approx. 80 pages)
- ✓ Excel data models and datasets for all exercises
- ✓ Interactive exercises with personalised support

Unit 1: Introduction to Power Pivot 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
- ✓ What is Power Pivot?
- ✓ Advantages of using Power Pivot to model data in Excel

Unit 2: Loading Data into Power Pivot

- ✓ Load data into a Power Pivot data model
- ✓ Navigate the Power Pivot environment
- ✓ Data view vs. Relationship view
- ✓ Hiding tables/columns in Power Pivot
- ✓ Change the Power Pivot Data Load options
- ✓ Refresh the data in Power Pivot
- ✓ Create a PivotTable or PivotChart from Power Pivot

Unit 3: Relationships

- ✓ Data tables vs. lookup tables
- ✓ Why create relationships?
- ✓ Create a relationship
- ✓ Inspect a relationship
- ✓ Identify the keys in a relationship
- ✓ Understand the cardinality of a relationship
- ✓ Active vs. Inactive relationships
- ✓ Understand the cross filter direction
- ✓ Identify & troubleshoot problematic relationships

Unit 4: 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
- ✓ Understand filter context
- ✓ Create measures using SUM, AVERAGE, COUNTROWS, DISTINCTCOUNT, DIVIDE, MIN and MAX
- ✓ Create measures using the AutoSum function

Unit 5: Creating Measures with CALCULATE()

- ✓ Use CALCULATE() to create filtered measures
- ✓ Add measures with different filter contexts to a single visualisation
- ✓ Use ALL() with CALCULATE() to ignore report filters

Unit 6: Time Intelligence

- ✓ What is Time Intelligence?
- ✓ Load a Date table
- ✓ Mark a table as a Date table
- ✓ Create relationships with the Date table
- ✓ TOTALYTD() for calendar and financial years
- ✓ SAMEPERIODLASTYEAR(), DATEADD()
- ✓ DATESINPERIOD()
- ✓ Calculating Growth and Variance
- ✓ Set alternative Sort By column
- ✓ Add conditional formatting to reports (data bars, icons)

Unit 7: 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 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 8: Creating a Corporate Look-and-Feel in Excel

- ✓ Add a corporate logo
- ✓ Add conditional formatting
- ✓ Explore out-of-the-box themes
- ✓ Save customised colours, fonts and effects into a custom theme file
- ✓ Import a custom theme file

Unit 9: 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