Deep Dive into Power Query for Excel – 1 day course

About the course

CMBI's *"Deep Dive into Power Query for Excel"* course is aimed at analysts and developers who want to learn how to automate data processing and improve reporting in Excel. The session focuses on teaching you the skills required to automate repetitive data load and data manipulation tasks, to improve efficiency and drive better insight and decision-making in your organisation.

This **1-day course** will provide you with valuable hands-on experience of Power Query that will revolutionise the way you work with data in Excel. At the end of the training session, you will know how to use Power Query to build automated and maintainable data load processes in Excel that will save you countless hours in the future.

Who should do this course?

This course is designed for analysts and developers wanting to learn how to automate routine data load and data processing tasks in Excel using Power Query. No prior experience of Power Query is required.

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 80 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 (approx. 80 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 Query in Excel
- ✓ 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 custom columns
- ✓ Add index columns
- ✓ Add prefix/suffix to column values
- ✓ Add date columns (eg, month name, quarter, year…)
- ✓ Add a comment to a transformation step
- ✓ Rename a transformation step
- ✓ Rename a column
- ✓ Remove columns vs. Remove other columns

Unit 4: Reshaping Data with Power Query

- ✓ Filter data
- ✓ Group data
- ✓ Unpivot data
- ✓ Augmenting data with date columns (month name, month number, year, days in month, end of month, quarter…)

Unit 5: Integrating Data with Power Query

- ✓ Merge multiple datasets together
- ✓ Understand the advantages of Power Query's Merge function over Excel's VLOOKUP
- ✓ Append data from two or more tables into a single table
- ✓ Load data from a folder location
- ✓ Combine file contents of a folder into a single table
- ✓ 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: Parameterising Queries

- ✓ What are parameters?
- ✓ Why use parameters?
- ✓ Create a basic parameter object
- ✓ Add a parameter to a query
- ✓ Create a parameter that selects from a drop-down list
- ✓ Refresh a parameterised query