Introduction to Excel Power Tools

Training Course Content (3 Days – 8:45 AM to 5:00 PM)

Course Objective: In this course, students will learn the fundamentals of the Excel Power tools: Power Query, Power Pivot and Power Map. Students will also learn how to build reports using Power BI Desktop and publish to Power BI Online.

Prerequisites: To ensure your success, we recommend that you first take Excel Level 1, Level 2, and In-Depth PivotTables, or have equivalent knowledge and skills - such as knowledge of advanced features and functions.

Agenda Days 1 - 2: 8:45 AM – 5:00 PM

Power Query

Explore Power Query/Get & Transform

- Power Query in Excel 2013 vs Get & Transform
- Identify Data Source Types Available for Import
- Common Steps for using Power Query

Connect to and Load Data using Power Query

- Connect to Data Sources
- Use Query Editor to View Data
- Data Load options and Query Navigation Panel

Transform and Shape Data using Columns

- Column Options in Query Editor
- View and Modify Query Steps
- Sort and Filter data in Query Editor

Group Data, Append and Merge

- Group Data in a Column
- Append Data from Two Queries
- Merge Queries

Aggregate Data and Analyze Data

- Use Query Editor to aggregate data from a column
- Analyze Query Data in a PivotTable

Power Pivot

Getting Started with Power Pivot

- Explore the Power Pivot Application
- Import Data from Various Data Sources
- Refresh Data from a Data Source
- Create Linked Tables

Manipulating Power Pivot Data

- Organize and Format Tables
- Create Calculated Columns
- Sort and Filter Power Pivot Data
- Work with Table Relationships and the Data Model

Creating Power Pivot Reports

- Create PivotTables from Power Pivot
- Create PivotCharts from Power Pivot
- Filter Data Using Slicers
- Present PivotTable Data Visually

Introduction to DAX Measures in Power Pivot

- Using Calculated Columns with Measures
- Manipulate Power Pivot Data Using DAX Measures

Distributing Power Pivot Data

- Protect Reports
- Save Reports in Different File Format

Introduction to Excel Power Tools (Continued)

Agenda Day 3: 8:45 AM – 5:00 PM

Power BI Desktop

Introduction to Power BI Desktop

- Understand the Power BI Desktop Interface
- Utilize the File Types; PBIX vs. PBIT
- Examine Data Sources
- Transform Data with Query Editor
- Build a Data Model
- Add Calculated Columns to Data Tables
- Create Measures using DAX
- Build Reports Using Visual Tiles
- Refresh Data Sources
- Publish to Power BI Online

Power BI Online

- Introduction to Power BI Online
- View the Online Interface
- Publish Excel File to Power BI (Office 365 Only)
- Examine the Workspace
- Create Visuals and Reports Online
- Create Dashboards using Pinned Tiles
- Set Favorites and Featured Dashboards
- Introduction to Share Options

Power Map

Getting Started with Power Map

- Power Map Overview
- Power Map Environment
- Data Source
- Launch and Navigate options through Power Map

Create a Power Map

- Create and Delete Tours
- Scene Settings and Options
- Add and Use Layers
- Layer Manager

Organizing the Source Data in Power Maps

- Work with Tables and Filters
- Field List Options
- Geography
- Mapping Options (Column, Bubble, Heat, and Region)
- Value, Time, Categories

Visualization for Power Maps

- Work and Modify Themes
- Map Display Options
- Insert Graphical Contents (Charts, Text boxes, Legends

Play and Present a Power Map Tour

- Run Power Map Tours
- Copy a Power Map Tour
- Export Power Map to Video
- Save Option