Faysal Aziz

Mastering MS Power Pivot, Power Query, and Dashboards

FA-0010 · 2-day

Data & Analytics

Introduction

This 2-day course is designed to provide a comprehensive understanding of Microsoft Power Pivot, Power Query, and Dashboards. Participants will learn how to use Power Pivot to perform powerful data analysis, create sophisticated data models, and generate reports. Power Query will be explored to discover, connect, combine, and refine data across a wide variety of sources. Finally, the course will delve into Dashboards, teaching participants how to compile data from multiple sources into a dynamic and interactive dashboard.

Learning outcomes

By the end of this course, participants will be able to:

- Understand the fundamental concepts of Power Pivot, Power Query, and Dashboards.
- Perform data modeling and analysis using Power Pivot.
- Use Power Query to import, clean, transform, and merge data.
- Create and manage interactive dashboards.
- Develop visual reports using various tools and features.
- Apply best practices to maintain and optimize performance of their data models.

Prerequisites

- Basic understanding of MS Excel functions and concepts.
- Familiarity with data analysis and reporting would be advantageous.
- Basic knowledge of relational databases is helpful but not mandatory.

Training outline

1. Day 1: Introduction to Power Pivot and Power Query (8 hours)

Session 1: Introduction to Power Pivot (2 hours)

- Understanding Power Pivot and its applications.
- Getting started with Power Pivot in Excel.
- Importing data into Power Pivot.
- Building a data model in Power Pivot.

Session 2: Advanced Power Pivot (2 hours)

- Creating calculated columns and measures.
- Working with DAX formulas.
- Understanding and working with relationships in data models.
- Enhancing the data model with hierarchies.

Lunch Break (1 hour)

Session 3: Introduction to Power Query (1.5 hours)

- Understanding Power Query and its applications.
- Importing data with Power Query.
- Transforming and cleaning data using Power Query.

Session 4: Advanced Power Query (1.5 hours)

- Merging and appending queries.
- Creating and using functions in Power Query.
- Working with complex data structures (nested tables, arrays).

2. Day 2: Dashboards and Applied Data Analysis (8 hours)

Session 1: Introduction to Dashboards (2 hours)

- Understanding the concept and purpose of dashboards.
- Creating a basic dashboard in Excel.
- Adding and configuring dashboard elements.

Session 2: Advanced Dashboards (2 hours)

- Incorporating Power Pivot and Power Query data into Dashboards.
- Using Slicers and Timelines for interactive dashboards.
- Building KPIs into your dashboard.

Lunch Break (1 hour)

Session 3: Visualizing Data with Power Pivot (1.5 hours)

- Exploring the visualizations available in Power Pivot.
- Creating and customizing charts and graphs.
- Creating a data story with visuals.

Session 4: Course Review and Real-Life Application (1.5 hours)

- Recap of key concepts learned from Power Pivot, Power Query, and Dashboards.
- Case study: Solving a business problem using the integrated tools.
- Open Q&A session for addressing doubts and questions.

Throughout this course, practical exercises and real-world examples will be provided to ensure participants can apply the knowledge they gain. This course is interactive and promotes active learning to aid in understanding and mastering the tools and techniques.

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