

Microsoft® Excel Business Intelligence

Course Overview

Business intelligence (BI) involves a set of theories, methodologies, architectures, and technologies to transform raw data into meaningful and useful information for business analysis purposes. To this end, Microsoft Excel's Power Pivot offers an agile and cost effective approach to BI. In this course, you will learn how to use Excel and its Power Pivot tools to mine large amounts of sophisticated data to provide better data analysis, business insights and inform decision making. Additionally, you will learn how to employ PivotTables, PivotCharts and VBA (Visual Basic for Applications) to present critical information to senior management through dashboards, enabling them to see a complete picture for a given initiative, project, or their organization.

Audience

For data analysts, business or policy analysts, financial analysts, managers, business intelligence professionals, or anyone who needs to improve their understanding of, or ability to work with data derived from multiple sources and/or large volumes of data using Power Pivot for Excel. Some basic experience with Excel and PivotTables is desirable.

Course Objectives

Upon completion of this course, participants will have the ability to:

- work effectively with the PowerPivot application
- and import data
- manipulate data in a PowerPivot worksheet
- create reports using PowerPivot data
- use DAX (Data Analysis Expressions) functions in PowerPivot

Course Content

Getting Started with PowerPivot

- What is Business Intelligence
- Understanding goals, metrics and key performance indicators
- Explore the PowerPivot application
- Import Data from various data sources
- Refresh data from a data source
- Create linked tables

Manipulating PowerPivot Data

- Organize and format tables
- Create calculated columns
- Sort and filter PowerPivot data
- Create and manage table relationships

Creating PowerPivot Reports

- Create a PivotTable
- Create PivotCharts
- Filter data using slicers
- Present PivotTable data visually
- Create key performance indicators

Using DAX Functions in PowerPivot

- Manipulate PowerPivot data using DAX functions
- Extract data from tables using functions
- Work with time dependent data

Distributing PowerPivot Data

- Protect reports
- Save reports in different file formats