Software Solutions
Microsoft Excel – Power Pivot
Data Analysis and Insights
Level Five

Power Pivot otherwise known as Data Model, is an Excel add-in you can use to perform powerful data analysis and create sophisticated data models. With Power Pivot, you can mash up large volumes of data from various sources, perform information analysis rapidly, and share insights easily. This course teaches the learner how to get data into Power Pivot and Microsoft Excel, model it, manipulate it and report findings. This course is jammed packed with exercises that teach the learner how to create a data model that relates data from a variety of sources, how to create calculated columns and measures using DAX functions and how to present the data in powerful pivot tables and pivot charts that include slicers, and KPI's. It is fundamental that an Excel user be able to get data and transform data so that it can then be reported effectively. Power Query is not a pre-requisite but is an advantage for this course.

COURSE CONTENT
UNDERSTANDING EXCEL, POWER PIVOT AND POWER PIVOT TOP FEATURES AND HOW THE DATA IS STORED
ENABLE POWER PIVOT ADD-IN AND WORKING WITH THE POWER PIVOT EDITOR
GET EXTERNAL DATA

☐	EXISTING CONNECTIONS	☐	REFRESH AND REFRESH ALL
☐	PASTE APPEND AND PASTE REPLACE	☐	ADD POWER QUERY TO THE DATA MODEL

CREATE DATA MODEL

☐	DEFINE RELATIONSHIPS	☐	SAVE THE DATA MODEL
☐	MANAGE RELATIONSHIPS	☐	DATA VIEW
☐	MANAGE SHEETS		

DATA TYPES

☐	CONSIDERATIONS WHEN CHANGING DATA TYPES	☐	UNDERSTANDING THE CURRENT DATA TYPE
☐	DATA CONVERSION WHEN CHANGING DATA TYPES IN POWER PIVOT		

CALCULATED COLUMNS
CREATE CALCULATED COLUMNS INCLUDING FUNCTIONS LIKE FILTER, RELATED, YEAR, WEEKNUM, MONTH, EOMONTH, EDATE, DISTINCTCOUNT, SUMX, AVERAGEX, COUNTAX, COUNTX, AND MAXX

☐	UNDERSTANDING CALCULATED COLUMNS	☐	CALCULATION OPTIONS
☐	NAMING CALCULATED COLUMNS	☐	PERFORMANCE OF CALCULATED COLUMNS
☐	ROW ITERATOR CALCULATIONS	☐	MANAGE COLUMNS
☐	FORMAT COLUMNS	☐	AGGREGATE COLUMN CALCULATIONS
☐	CALCULATIONS IN THE DIAGRAM VIEW		

FILTER & SORT
CREATE PIVOTTABLES FROM DATA MODEL CONNECTIONS AND FROM DATA MODEL QUERY
ADVANCED PIVOTTABLE DESIGN, LAYOUT AND FORMATTING
MEASURES

☐	MEASURES AND CALCULATED COLUMNS	☐	COLLAPSE AND EXPAND FIELDS

PIVOTCHART

☐	PIVOTCHART TYPES	☐	DESIGN TAB
☐	QUICK LAYOUTS	☐	COLOUR PALETTES
☐	CHART STYLES	☐	SWITCH ROW/COLUMN

SLICERS

☐	CREATE SLICERS	☐	MANAGE SLICERS
☐	FILTER WITH SLICERS	☐	DELETE SLICERS

KEY PERFORMANCE INDICATORS (KPIS)

☐	BASE VALUE	☐	TARGET VALUE
☐	STATUS THRESHOLDS	☐	CREATE A KPI
☐	EDIT A KPI	☐	DELETE A KPI

POWER PIVOT DAX FUNCTIONS BY CATEGORY

☐	DATE AND TIME FUNCTIONS	☐	INFORMATION FUNCTIONS
☐	FILTER AND VALUE FUNCTIONS	☐	LOGICAL FUNCTIONS
☐	MATH AND TRIG FUNCTIONS	☐	STATISTICAL FUNCTIONS
☐	TEXT FUNCTIONS	☐	TIME INTELLIGENCE FUNCTIONS

Microsoft Excel Level One is a pre-requisite for this course. Attendees must be able to quickly and effectively manipulate data in Microsoft Excel.