



BUSINESS INTELLIGENCE

Business Intelligence & Data Analysis using Excel

Workplace Learning Pathway



COURSE CONTENTS

DATA ANALYSIS CONCEPTS

- What is data analysis & business intelligence (BI)?
- Excel vs Power BI
- Similarities & differences
- Excel "Power" tools
- Aggregating & summarising
- Data sources
- About relational data
- The data model
- Visualisations
- Publishing

USING A SINGLE DATA SOURCE

- Using measures & calculated columns
- Grouping dates
- Pivot table report styles
- Report totals

DATA VISUALISATION

- Pivot charts
- Using filters, slicers & timelines
- Geospatial data & maps

USING MULTIPLE DATA SOURCES

- What are related data sets
- Data relationships
- How to manage related data
- Working with multiple data sources
- Lookup functions to join tables
- The Excel data model

EXCEL POWER QUERY

- About Power Query
- Connecting to data sources
- Data transformation
- Data connections
- Use connection only
- Browse, filter and sort the data

GET & TRANSFORM

- Get data from multiple Excel tables
- Get data from a CSV
- Get data from a web site
- Get data from the ABS

TRANSFORMATION

- Simple Power Query transformations
- Query steps
- Calculated columns
- Applying the query to the data model

EXCEL POWER PIVOT

- The Power Pivot window
- Loading queries
- Diagram view
- Establishing relationships
- Data view
- Formatting data
- Calculated columns
- The calculation area
- Adding measures
- DAX expressions & syntax
- Create a KPI

THE CALENDAR TABLE

- What is a calendar table?
- What does a calendar table look like?
- Using a calendar table

DATA VISUALISATION

- Building the dashboard
- Inserting the Power Pivot table
- Adding data slicers
- Using a timeline slicer
- Adding a pivot chart
- Using date hierarchy
- Refreshing data

INTRODUCING POWER BI

- Getting started
- The help ribbon & training resources
- Get data from an Excel table
- Using data view
- View data in the fields pane

POWER BI REPORTING

- Using report view
- Create visuals
- Format visuals
- Building a report
- Working with pages

BUSINESS INTELLIGENCE & DATA ANALYSIS USING EXCEL

COURSE LENGTH

Recommended course duration is 2 days, typically 15 hours contact time. The course can also be delivered in a series of shorter sessions such as three to four half-day sessions

AIM

This course has been designed to allow participants to:

- gain an understanding of data management
- understand relational data tables
- use the Excel “Power” add-ins
- become proficient with Power BI

TARGET AUDIENCE

This course is an advanced level course and assumes some knowledge of Microsoft Excel. It is suitable for participants who:

- already have proficiency with Excel data analysis
- extensively work with data in spreadsheets and databases
- need to gain insights into their data
- need to visualise their data
- want to produce professional looking and functional dashboards and reports

OUTCOMES

By the end of this session you should be able to:

- use Excel Power Query to import and transform data sources
- use Excel Power Pivot to analyse complex data sets
- use Excel Power Maps to display geographical data
- use Power BI to create interactive dashboards
- describe the difference between Power BI Desktop and Power BI online

ABOUT US

Isis Training are accredited Microsoft Office trainers and Microsoft Partners. We offer a large range of customised technology courses. We have been providing corporate training solutions in Far North Queensland from our base in Cairns since 1995. Our company maintains an internal Business Management System and our focus is always on delivering programs of the highest quality to our clients.

We also operate Corporate Central, a company specialising in developing Microsoft solutions – ranging from smart Excel spreadsheets and Word templates, right through to full paperless electronic Document or Project Management Systems using SharePoint and cloud based technologies.