

Business Intelligence – Concepts and Excel Tools

*Get, Transform and Visualize your data to
Drive Performance*

PRESENTED BY:

DAVID WAWRZYNEK MS MBA

SENIOR CONSULTANT

CCSI



Part 2: Get and Transform your Data – Power Query

Business Intelligence – A Four part series

- ▶ **Fundamentals of Business Intelligence**
Wednesday October 17, 2018 12-1 pm
- ▶ **Get and Transform your Data – Power Query**
Tuesday October 30, 2018 12-1 pm
- ▶ **Data models and data visualization**
Wednesday November 7, 2018 12-1 pm
- ▶ **Office Hours: Tuesday November 13, 2018 12-1 pm**

Learning Objectives

- ▶ **Gain a better understanding of the concepts related to business intelligence**
- ▶ **Become aware of the functionality in Excel that supports data analysis and data visualization including: tables, pivot tables, pivot charts, power query, power pivot, and data analytic expressions.**
- ▶ **Witness how the excel functionality can be applied in your organization through the demonstration of a BI productivity monitoring tool**

The Challenges

- ▶ The need for timely and accurate information necessary to inform our decisions is increasing at a rapid pace
- ▶ Data informed decisions will be one of the keys to success in a value based environment
- ▶ Data is created in different applications, may be stored in different locations, and may have different formats
- ▶ It is becoming increasingly important to join data from different sources to create a “complete” picture of your environment
- ▶ Data must be provided to our end users in an easy to use and easy to understand visual format

Where to start

- ▶ Create a strategy for gathering, storing, analyzing and providing data to end users based upon the concept of Business Intelligence (BI)
- ▶ Leverage your current resources by using the BI tools that are currently in Microsoft Excel
- ▶ Create a data informed environment by providing information to your end users and by embracing the concept of self-service analytics

Business Intelligence

Business intelligence is a term that refers to skills, processes, technologies, applications and practices used to support evidence-based decision making in organizations. It can be defined as approaches for gathering, storing, analyzing, and providing data that helps users to gain insights and make better fact-based decisions.

Business Intelligence

Gathering Data

Processes and tools used to access, cleanse, integrate, and aggregate information used for reporting and analysis

Examples

- Using a query tool to directly access a database or other data sources.

Business Intelligence Tools

Get and Transform

Excel features that provides fast, easy data gathering and shaping capabilities. Enables you to connect, combine, and refine data sources to meet your analysis needs.

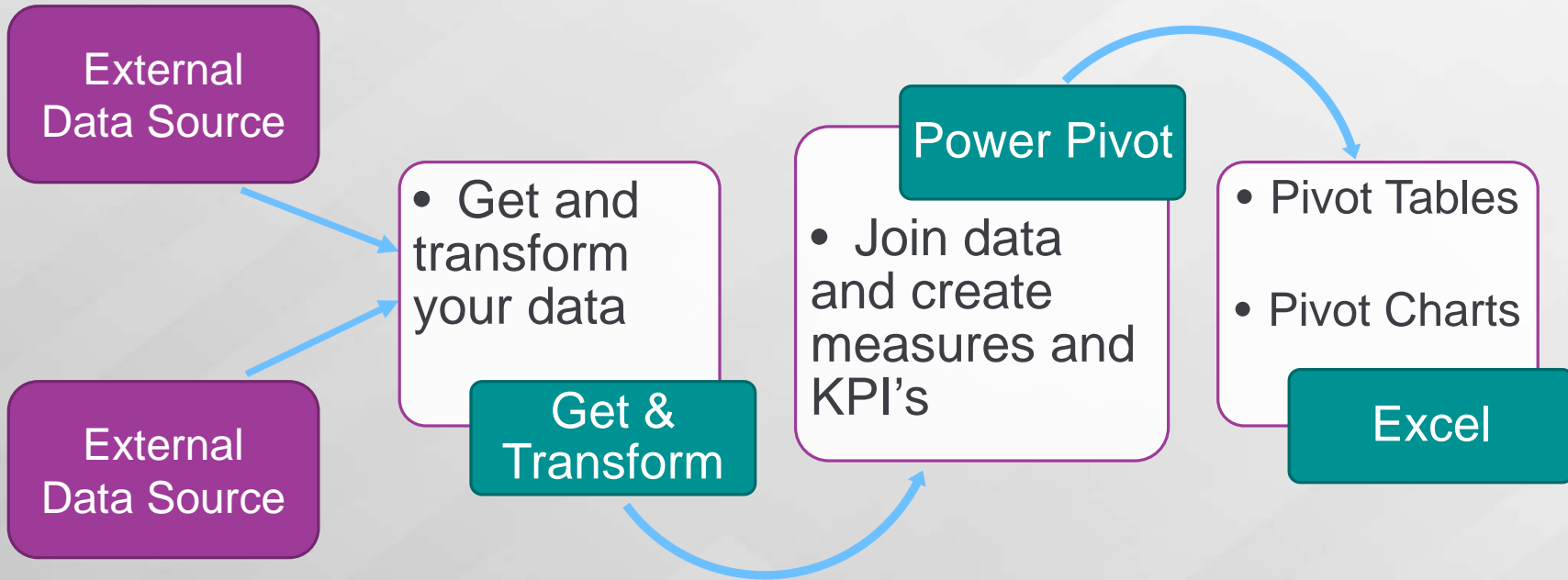
How to use

- Create a query (data request) in your workbook that connects to a data source
- Transform your data to make it useable
- Load your data into a table or a data model

Business Intelligence Tools

Data model

A set of functions within Excel that allows you to integrate data from multiple tables effectively building a relational data source inside an Excel workbook. Data models provide tabular data used in PivotTables and Pivot Charts.



Demonstration

Creating a simple dashboard using:

Get and Transform

Power Pivot

Pivot Tables

Pivot Charts

Resources

- ▶ **powerpivot(pro): <https://powerpivotpro.com/>**
 - Online training, books, blogs, training classes
- ▶ **Introduction to Get & Transform (Power Query) for Excel: <https://support.office.com/en-us/article/get-transform-in-excel-881c63c6-37c5-4ca2-b616-59e18d75b4de>**
- ▶ **Power Pivot: Powerful data analysis and data modeling in Excel: <https://support.office.com/en-us/article/Power-Pivot-Powerful-data-analysis-and-data-modeling-in-Excel-A9C2C6E2-CC49-4976-A7D7-40896795D045>**

Questions?



THANK YOU FOR ATTENDING TODAY'S WEBINAR!

- ▶ Check out our website: www.ctacny.org



- ▶ MCTAC email: mctac.info@nyu.edu