



# ***Power BI for the Excel veteran***

DAVID BENAIM

SEPTEMBER 5, 2024

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**David Benaim**

# What is your experience with Power BI?

*Single select*

I've never  
seen it

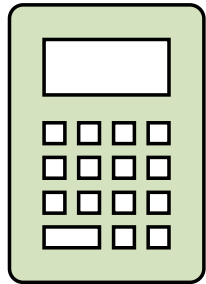
Seen it but  
never used it

I consume  
PBI but  
never create

I have created  
once or twice

I'm a regular  
Power BI  
user

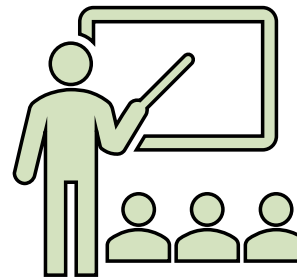
# David Benaim



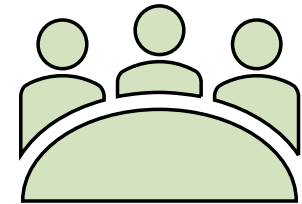
ICAEW  
accountant



Microsoft  
MVP



Training  
>3000



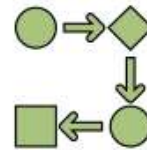
120  
Organisations

# ***Power BI for the Excel veteran***

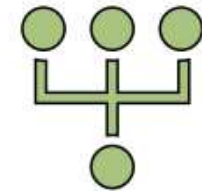
***Dash-boards***



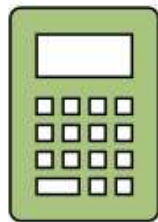
***Power BI  
Components***



***Joining  
tables***



***Data  
modeling***



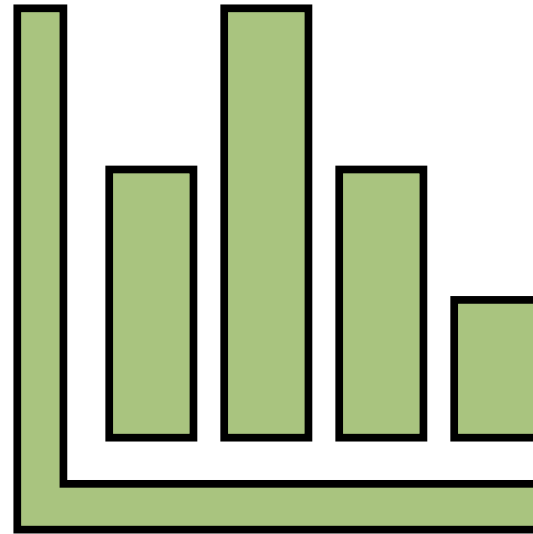
***Power BI  
online &  
license***



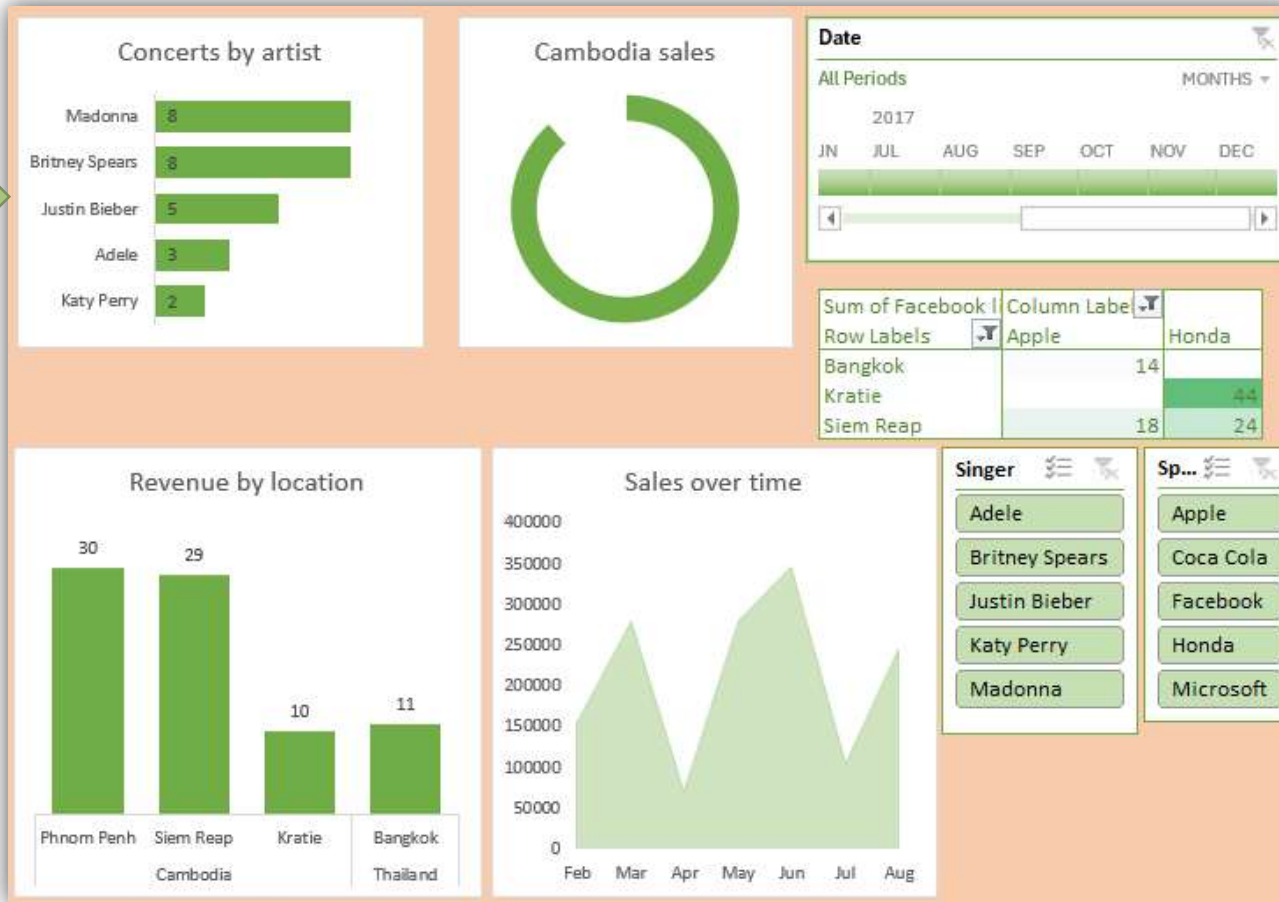
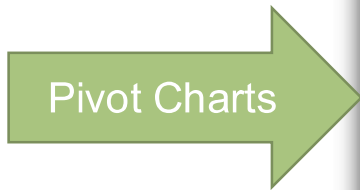
***Summary***



# *Dash-boards*



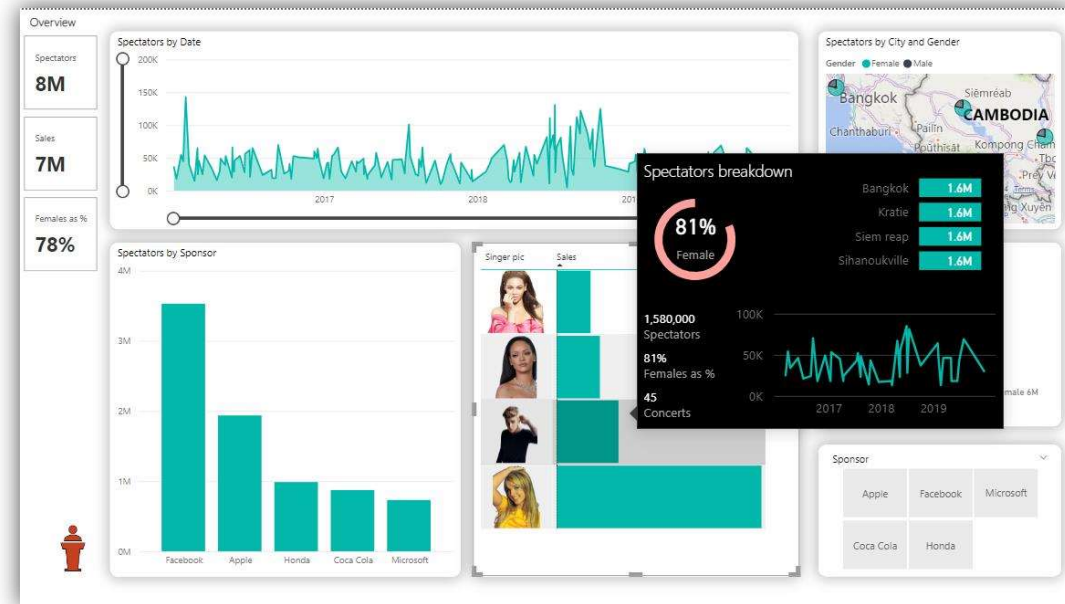
# Excel dashboards



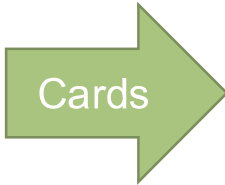
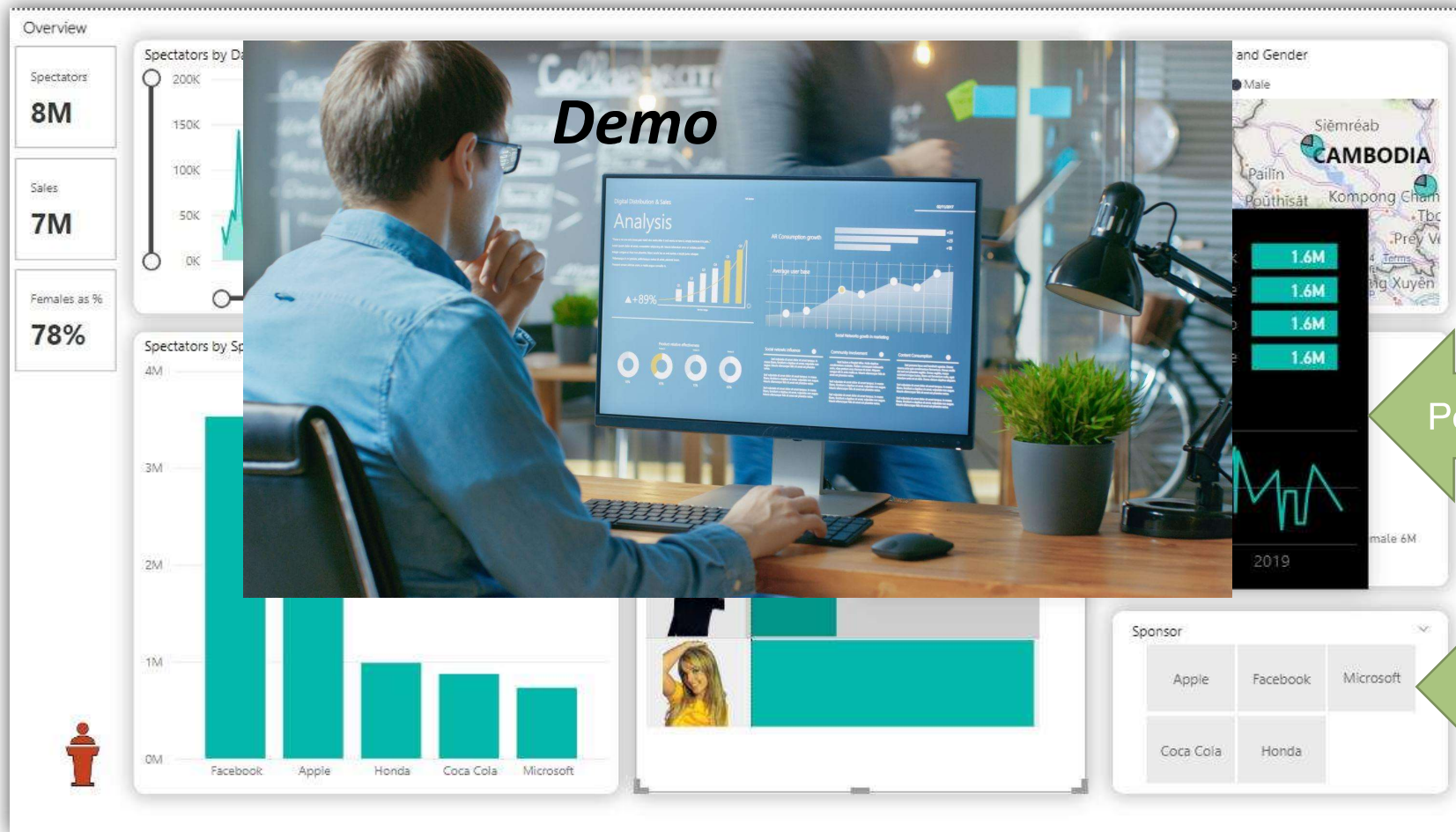
# Excel dashboard



# Power BI



# Power BI dashboard



# Demo



# Which do you use in Excel? *Multi select*

Pivot  
Tables

Bar  
charts

Slicers

Power  
Query

Map  
charts

Spark  
lines

Power  
Pivot

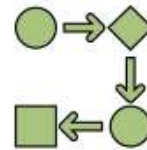
Excel's AI  
analysis

# ***Power BI for the Excel veteran***

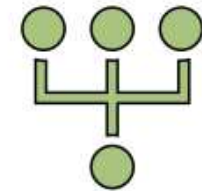
***Dash-boards***



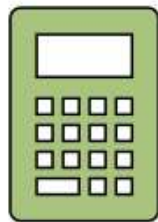
***Power BI  
Components***



***Joining  
tables***



***Data  
modeling***



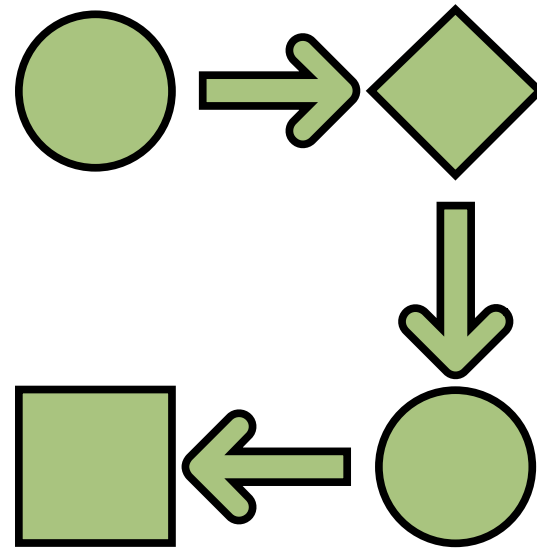
***Power BI  
online &  
license***



***Summary***



# *Power BI Component*s



# The Power Tower

Targets

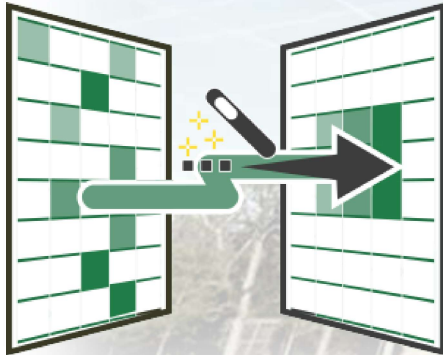
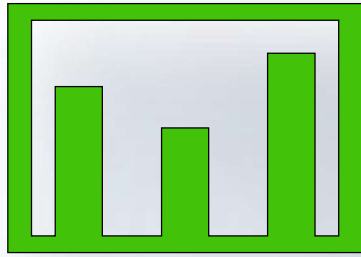


X



Raw data



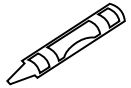


3. Build visuals

2. PowerPivot links tables & creates calcs.

1. Power Query extract & cleans





## Values of 1 type in same col.



Name	Date	Country	Price	Qty	Item	Status
Jake	26/03/2015	Cambodia	7.5	9	Apple	Sent
Sopheha	15/12/2014	Cambodia	8.5	4	Orange	Sent
Manith	01/04/2015	Vietnam	5.5	1	Mango	Unsent
Piseth	05/11/2014	Laos	6.5	3	Banana	Sent
Jake	07/03/2015	Laos	6.5	5	Apple	Sent
Piseth	03/12/2014	Vietnam	8.5	1	Orange	Unsent
Manith	04/04/2015	Cambodia	7.5	7	Durian	Unsent
Jake	04/11/2014	Vietnam	7.5	4	Durian	Sent
Piseth	26/12/2014	Laos	6.5	5	Apple	Unsent
Jake	16/02/2015	Vietnam	4	17	Durian	Sent
Sopheha	09/04/2015	Cambodia	4	16	Banana	Unsent

- ✓ One row header
- ✓ Unique headers
- ✓ Avoid blanks
- ✓ Avoid merged cells!
- ✓ No subtotals

# Demo

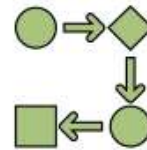


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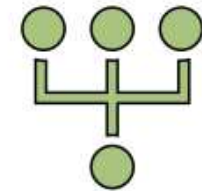
***Dash-boards***



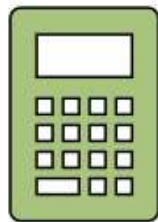
***Power BI  
Components***



***Joining  
tables***



***Data  
modeling***



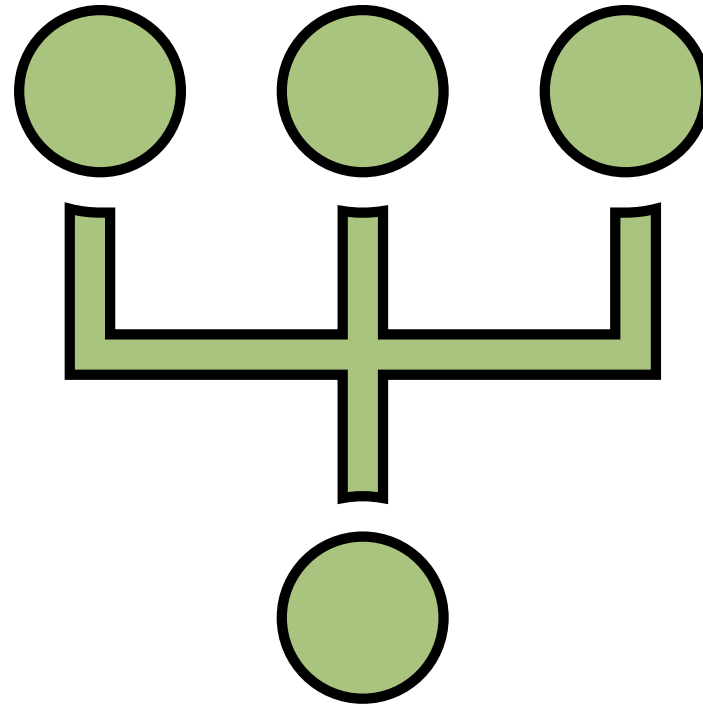
***Power BI  
online &  
license***

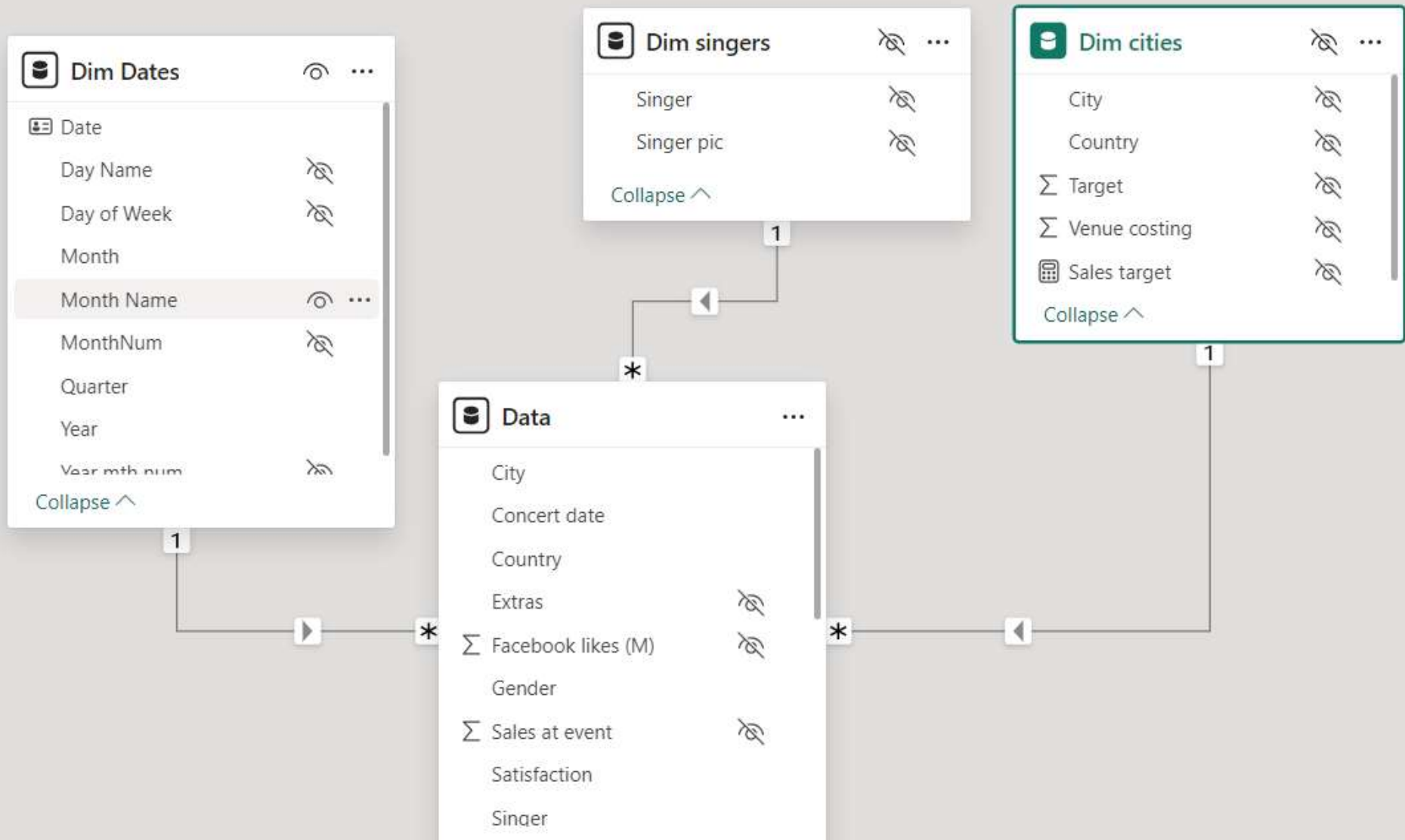


***Summary***



# *Joining tables*





# Demo

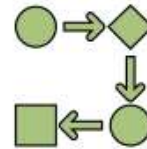


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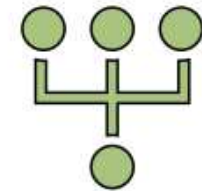
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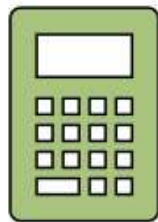
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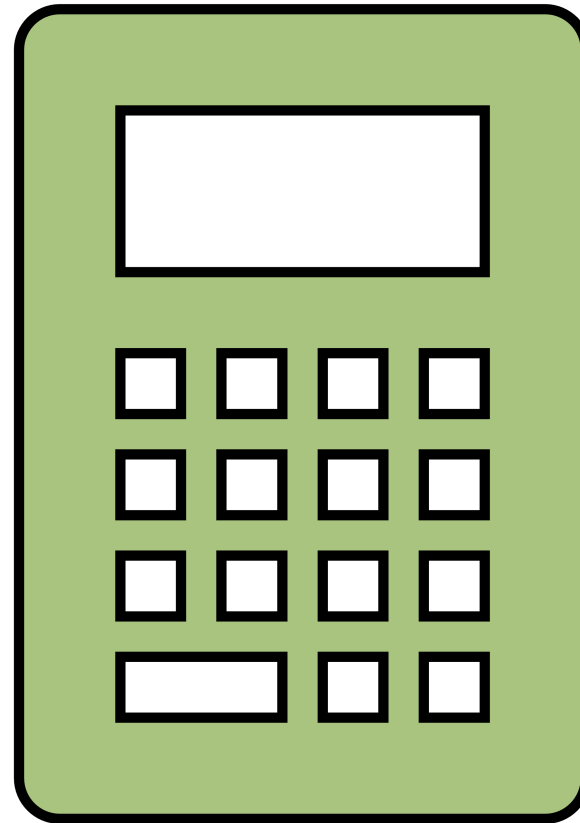
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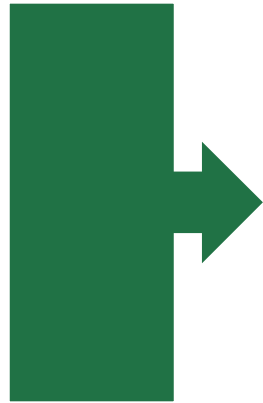
***Summary***



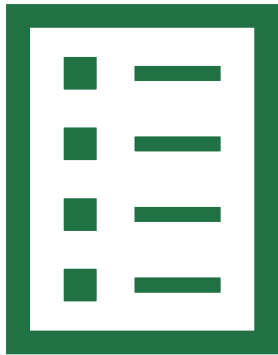
*Data  
modeling*



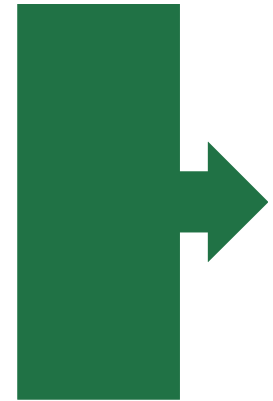
# ***Which Excel functions do you use***



# *Formula types*



Calculated  
column



Measures

# *Formula types*



...(E5+G5)

Current  
row  
*In input*



...(E5:E9)

Range or  
values  
*In output*

# ***Excel's limitations***

Sales made

Product	Client
TV	Gary
Tablet	Gary
Laptop	James
Tablet	Gary

# ***DAX Functions***

1. Excel-like: SUM, AVERAGE, MEDIAN, MAX
2. New aggregations: COUNTROWS, DISTINCTCOUNT, SELECTEDVALUE
3. Conditional: IF, SWITCH, DIVIDE
4. Unlocking DAX: CALCULATE

# Demo



# Which Power BI elements do you like?

Power Query

Table  
relationships

Writing DAX  
measures

DISTINCTCOUNT

Card visuals

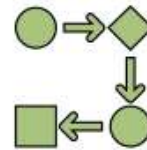
Drill down in  
visuals

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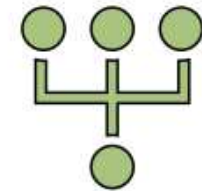
***Dash-boards***



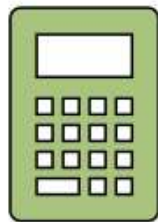
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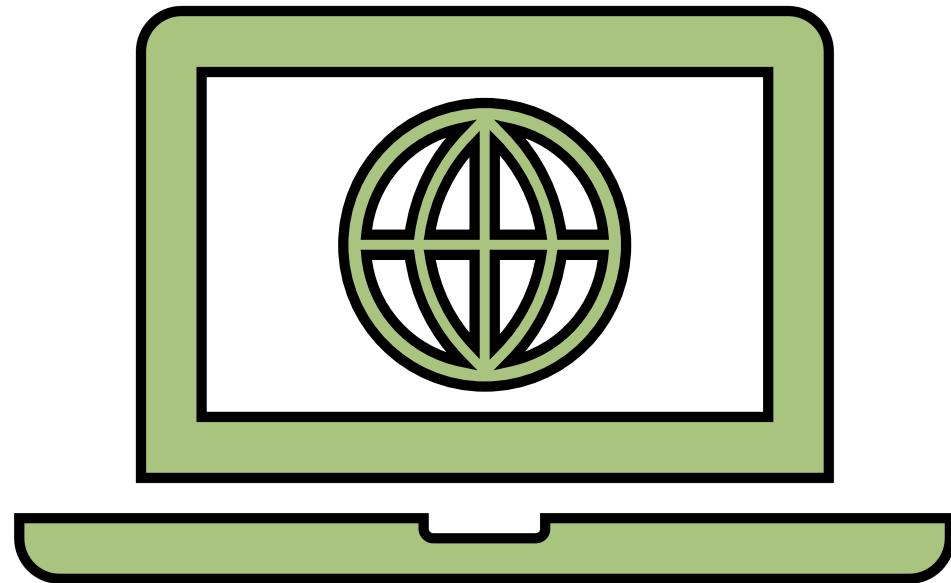
***Power BI  
online &  
license***



***Summary***



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# Demo

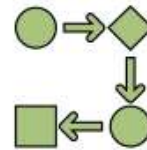


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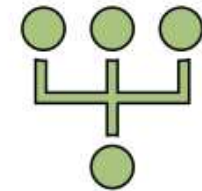
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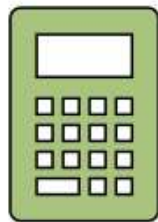
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***Data  
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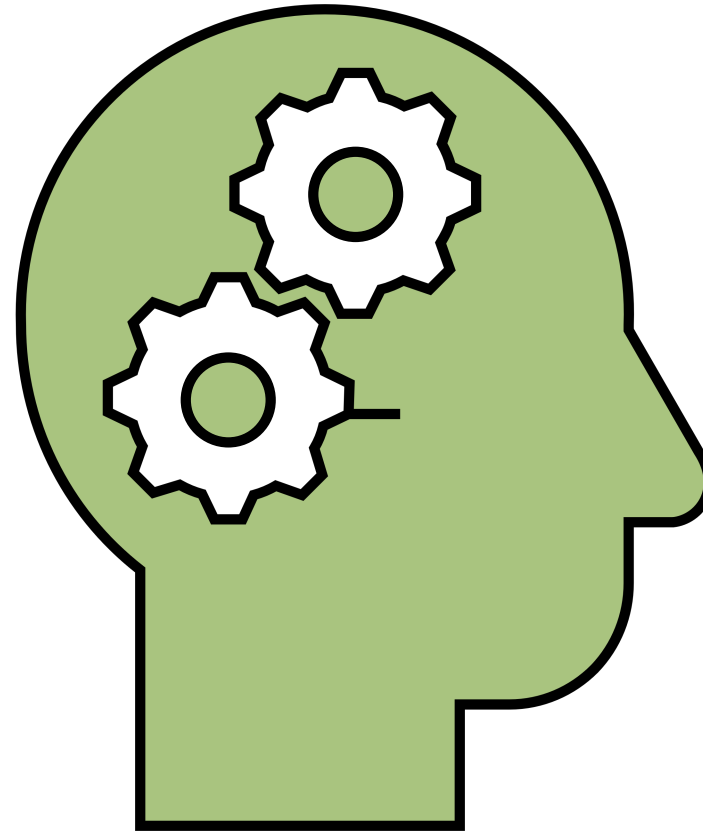
***Power BI  
online &  
license***



***Summary***



# *Summary*



# Which might you use in future? *Multi select*

Excel table  
joins

Excel  
Power  
Query

Power BI  
visuals

Excel DAX  
formulas in  
PivotTables

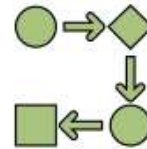
Power BI  
AI visuals

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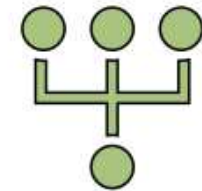
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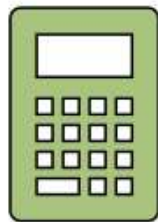
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***Summary***



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# ***Closing announcements***



***Next in the series.....***

***7 November 2024 – Automate & reshape  
data with Power Query and Macros***

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