

Data Transformation using Power Query Editor

Excel Power BI - 1 Day

Pre-requisites

There are no formal prerequisites required however the material would be appropriate for an intermediate Excel user.

Power Query is a data transformation tool used in both Excel and Power BI Desktop. It is an evolving technology and has undergone substantial revision under Microsoft ownership. Only Excel 2016+ is feature-compatible with Power BI Desktop. This course targets the current implementation of Power Query for both Power BI Desktop and Excel.

Data Transformation using Power Query is delivered as a standalone course but those users of Power BI Desktop who are heavily involved in data preparation or anticipate having to correct it should see this as a pre-requisite.

Description

This course comprehensively explores the use of Power Query for working with the Data Model in both Excel 2016+ and Power BI Desktop. Power Query is used for creating queries to perform data transformation with online/offline data sources.

Students will learn transformation operations and edit M code using Applied Steps and the Advanced Editor. Students will become familiar with a range of functions and tools for acquiring and transforming data from a range of sources including SQL databases, web sources, Excel worksheets and text files.

Learning Outcomes

At the completion of this course, you should have the skills and knowledge to:

- Assess data and manipulate it for use within the Data Model for both Excel and Power BI Desktop.
- Understand M syntax, definitions and objects and use them to develop advanced transformation processes.
- Understand and use a variety of operations and functions available within M.
- Use parameterised queries as functions and invoke them.

Topics

Key topics covered in this course include:

The Data Model and the Power Query Editor

- Understanding the Data Model in Excel 2016+ and Power BI Desktop.
- Create queries using different data sources: SQL database, Web pages, Excel spreadsheets, text files

Beginning Operations in Power Query Formula Language

- Basic data/table transformations
- Columns: add calculated custom columns, remove columns
- Replace values, sort and filter data

Query Management

- Merge, rename, append and group queries

M Functions

- Text, Date, Time, List Generators
- Column from Examples
- Custom Column Functions
- Blank queries and List Generator Functions

Learning Power Query Formula Language syntax

- The Advanced Editor
- Power Query Formula Language (M)
- Edit M Code

Turn a Query into a Parameterized Custom Function

- Parameter based query
- Invoke a Custom Function