

# **ADVANCED EXCEL PIVOT TABLE TECHNIQUES WITH POWER BI**

---

Mihaly Kavasi – Southampton Excel User Group – 30 October 2024

# Introduction



## Mihaly Kavasi

Group Manager

Delivery Lead and Trainer

Avanade

- ✓ 8+ Years of Power BI Experience
- ✓ 7+ Year of Training Experience
- ✓ Microsoft Certified Solution Expert – Data Management and Analytics
- ✓ Microsoft Certified Trainer
- ✓ Azure Enterprise Data Analyst
- ✓ Fasttrack Recognized Solution Architect

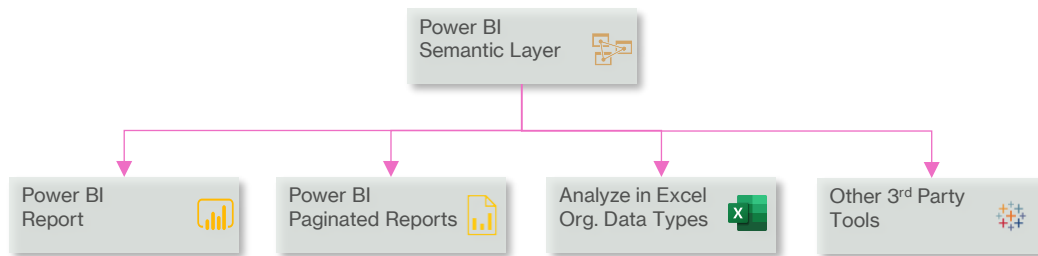


LinkedIn: [Kavasi Mihaly](#)

Blog: <https://selfservicebi.co.uk/>

# Excel vs Power BI

- “Let’s move away from Excel and embrace Power BI for Data Analytics!”
- For sure we need to move away from Excel as a database
- Power BI is not just a reporting tool, but a whole ecosystem.
- Need to separate the semantic layer from the reporting layer.



# Excel & Power BI: Better together

To make organizations data driven we should make working with data as easy as possible.

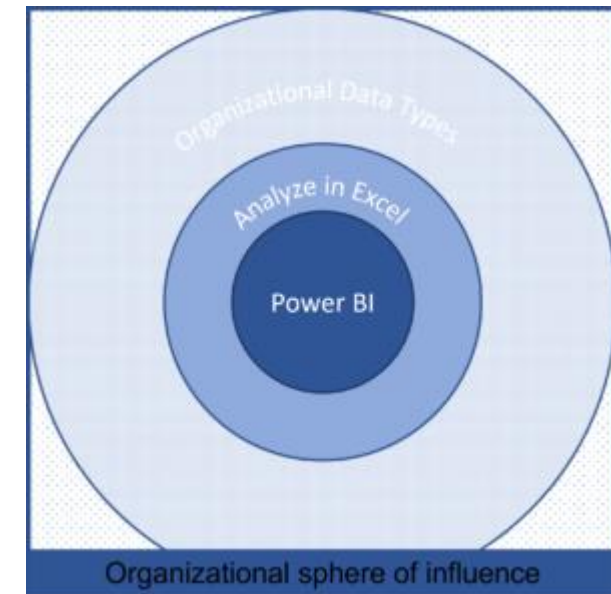
In an organization people whose core task is to analyse data and need the capabilities of a tool like Power BI is relatively small.

But almost everyone uses Excel for ad hoc tasks.

In this session we are going to talk about how to utilize the different ways Power BI and Excel can work together.

Features covered:

- Connecting to Data flows, Data models
- Analyse in Excel
- OLAP Tools
- Optional: Organizational Data Types



# Analyse in Excel

<https://selfservicebi.co.uk/hidden-features-of-analyze-in-excel-part-1-show-me-the-details/>

<https://selfservicebi.co.uk/hidden-features-of-analyze-in-excel-part-2-give-me-all-the-data/>

<https://selfservicebi.co.uk/hidden-features-of-analyze-in-excel-part-3-focus/>

Connect to a Power BI semantic layer with Excel.

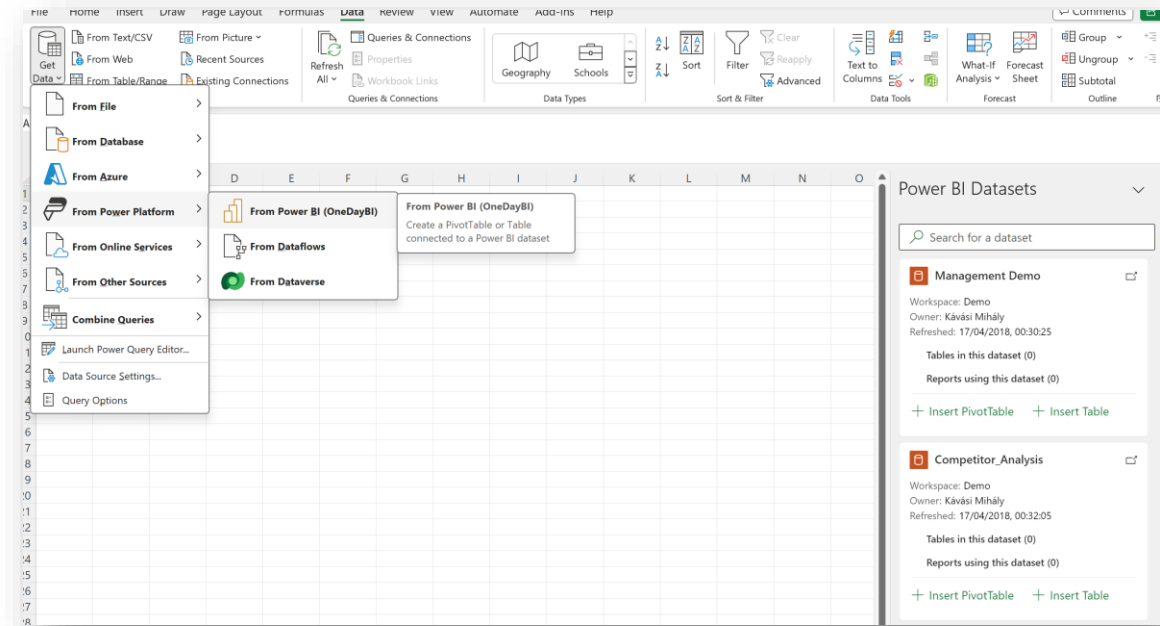
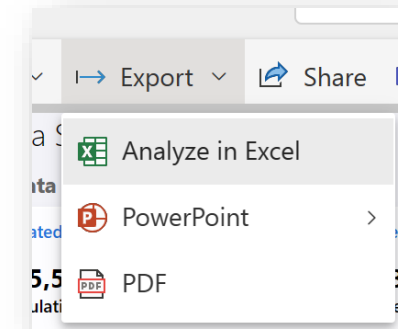
Enables live, refreshable connection.

Caution:

- Keeps last refreshed data (security issue)
- Only proper access enables refresh

Showcase:

- Different ways to extract data from Power BI
- Available in MDX
- Detail Rows
- OLAP Drill through





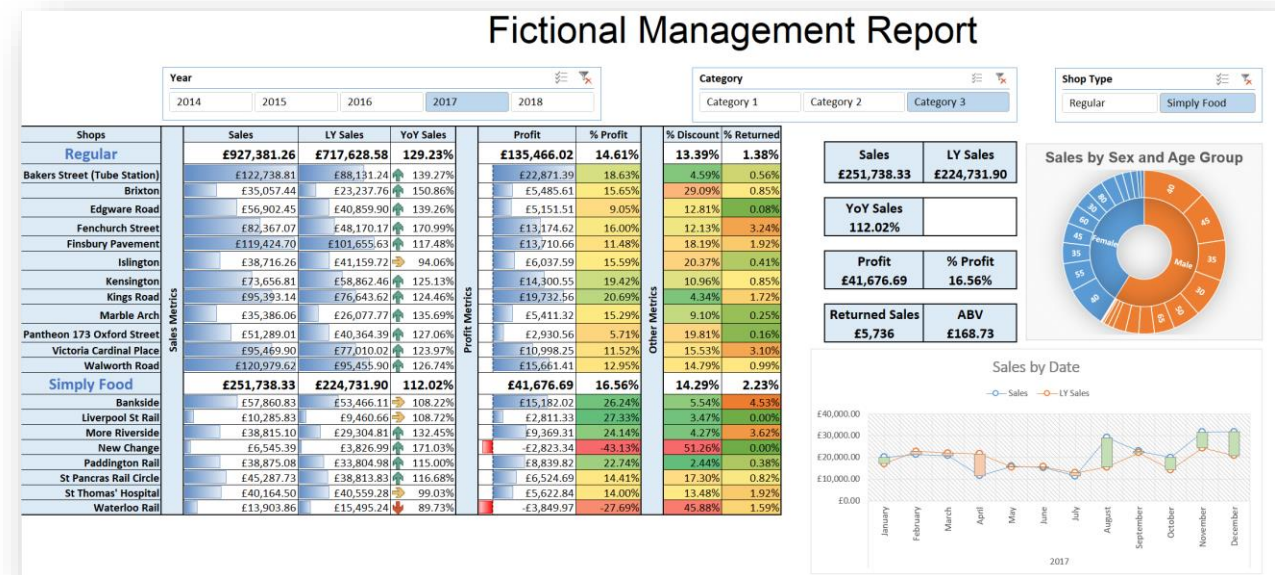
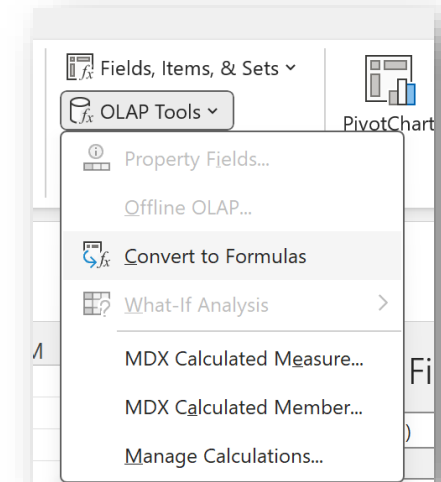
# OLAP Tools – MDX Formulas

Pivot tables in Excel are a standard way to analyse data from a model. Sometimes you would like to have more freedom in presenting the data without the need to export.

This is where Formulas come in handy. They give you the freedom to query specify part of the model and enable you to create dynamic filters. You can use this technique to build interactive and refreshable dashboard in Excel.

Showcase:

- MDX Formulas
- Slicers
- Dynamic Dashboard



# Organizational Data Types

<https://selfservicebi.co.uk/organizational-data-types-supercharge-your-excel-users-productivity/>

Fairly unknown feature in Excel.

Primary goal is to provide a reliable source of master data.

Enables utilization of data stored in Power BI to be used by Excel users without even knowing about Power BI.

Optimal for operational tasks.

Showcase:

- Using Data Types

