



Advanced 2-Day

Alpesh Tailor

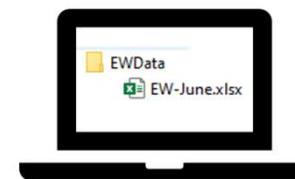
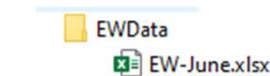
Our Data Local v Cloud



The core data is stored as Excel (.xls) in a folder

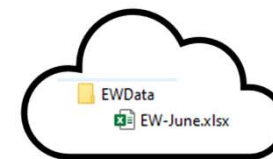
Local Drive

This folder can be on a **local drive**, however the data updates/refreshes will need to be handled *manually*



Cloud Drive

If the folder is stored on a **cloud drive**, e.g. SharePoint | Business OneDrive | AWS | iCloud etc then updates/refreshes can be *scheduled* via *Power BI (Pro or Premium)*



Refreshing Process



Let's assume you wish to refresh monthly in one folder

Do you wish to **overwrite** the Excel file every time or **append** to it?

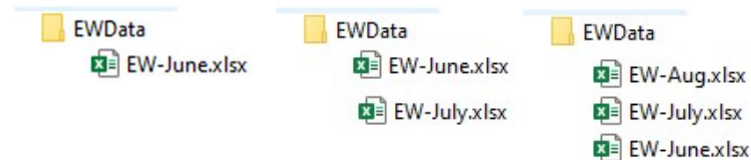
Overwrite

This folder can be on a **local drive**, however the data updates/refreshes will need to be **handled manually**



Append

If the folder is stored on a **cloud drive**, e.g. SharePoint | Business OneDrive | AWS | iCloud etc then updates/refreshes **can be scheduled via Power BI (Pro or Premium)**

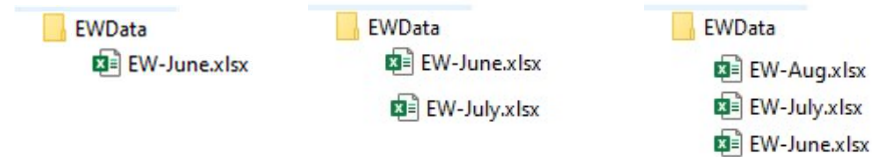


Our Data Structure



Each month an **additional** .xlsx file is added

Power BI can **Append** the new data to the existing data table via M-Code steps



36	25	Phyllis All	26-Nov-73	Single	Female	08-Jan
37	26	Marvin All	04-Feb-72	Married	Male	05-Jan

Employees Final Workshops Final Training Budget

	A	B
1	EmployeeID	Training Budget
2	1	9500

	A	B	C	D	E	F	G	H	I	J
1	EmployeeID	Employee BirthDate	MaritalStatus	Gender	HireDate	Dept	Salary	Job Grade	Location	
2	17	Amy Albe	06-May-79	Married	Female	11-Apr-98	Production	4096	Operations	Baltimore

	A	B	C	D	E	F	G	H	I	J
1	Course ID	Start Date	Course Code	Course Name	Cost	Supplier	Employee ID	Year	Month	Category
2	T2647	27-Feb-12	10	Introduction To Excel	£2,400.00	Excel Experts	22	2012	2	Technical

Data Modelling

Data Modelling – Three Relationship Types

1. **One to One**
2. **One to Many**
3. **Many to Many** *(ideally Power BI prefers One to Many) as this mean less joins -> less processing*

A	B
EmployeeID	Training Budget
1	9500
2	8150
3	11000
4	8550
5	6325
6	15250
7	9800
8	16500
9	7000
10	10900
11	5500

Employees Training Budget

A	B	C	D	E	F	G	H	I	J
EmployeeID	Employee BirthDate	MaritalStatus	Gender	HireDate	Dept	Salary	Job Grade	Location	
1	17 Amy Albe	06-May-79	Married	Female	11-Apr-98	Production	4096	Operations	Baltimore
2	1 Gustavo A	15-May-82	Married	Male	31-Jul-02	Sales	2295	Admin	Los Angeles
3	18 Anna Albr	08-Sep-85	Married	Female	18-Apr-98	Sales	1998	Operations	Beijing
4	2 Catherine	03-Jun-87	Single	Female	26-Feb-10	Sales	962	Management	London
5	8 Carla Ada	06-Jul-46	Married	Female	06-Feb-12	Finance	3989	Management	New York
6	3 Kim Aberc	13-Dec-64	Married	Female	12-Dec-07	Finance	4006	Admin	Paris
7	4 Humberto	23-Jan-65	Single	Male	05-Jan-07	Logistics	4547	Admin	Amsterdam
8	28 Cecil Allis	28-Apr-67	Single	Male	05-Jan-04	Human Resou	1711	Operations	London
9	5 Pilar Acke	29-Aug-49	Married	Female	11-Jan-07	Human Resou	1932	Admin	Baltimore
10	42 Chris Asht	13-Jan-66	Single	Male	12-Jan-13	Logistics	2018	Admin	Amsterdam
11	6 Frances A	19-Apr-65	Single	Female	20-Jan-05	Sales	3223	Management	Beijing
12	49 Cory Boot	18-Feb-87	Married	Male	15-Jan-09	Finance	4491	Management	Beijing
13	7 Margaret	16-Feb-46	Single	Female	26-Jan-13	Sales	1329	Operations	Berlin
14	48 Daniel Bla	06-Aug-88	Single	Male	15-Jan-10	Finance	3110	Management	Baltimore

Employees

A	B	C	D	E	F	G	H	I	J
Course ID	Start Date	Course Code	Course Name	Cost	Supplier	Employee ID	Year	Month	Category
1	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	33	2013	2	Technical
2	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	21	2013	2	Technical
3	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	19	2013	2	Technical
4	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	17	2013	2	Technical
5	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	16	2013	2	Technical
6	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	15	2013	2	Technical
7	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	14	2013	2	Technical
8	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	12	2013	2	Technical
9	T3647	27-Feb-13	10 Introduction To Excel	£2,400.00	Excel Experts	9	2013	2	Technical
10	T8486	03-Apr-13	5 Advanced Excel	£2,300.00	Excel Experts	49	2013	4	Technical
11	T8486	03-Apr-13	5 Advanced Excel	£2,300.00	Excel Experts	44	2013	4	Technical

Workshops that Employees attended

Our Data Model

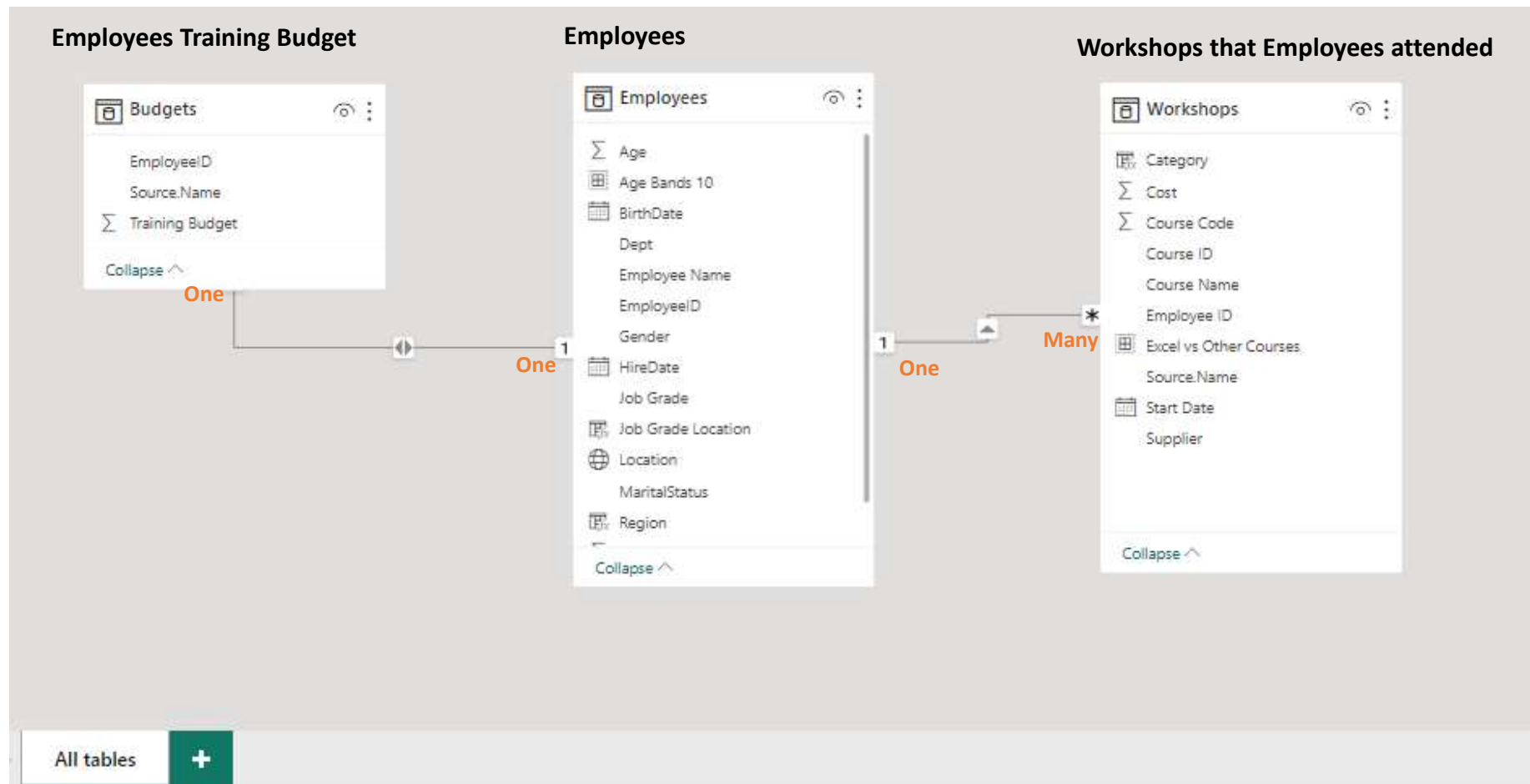
Simpler is better

TIP: Power BI prefers One to Many as this mean less joins

Performance

Ease of Use

Minimized Risk of Errors

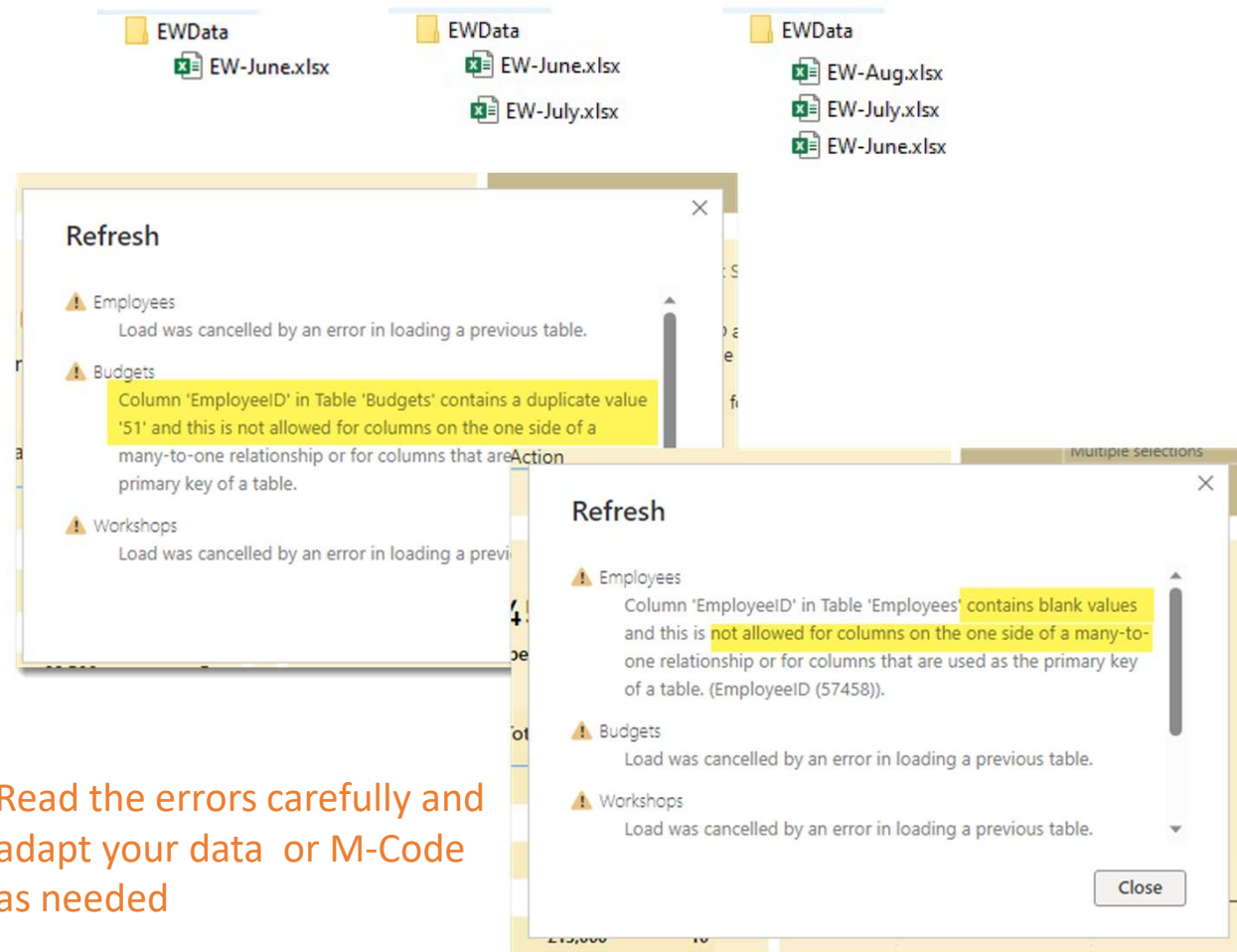


Testing Data Refreshing



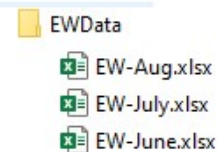
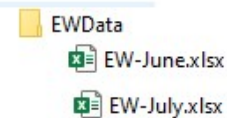
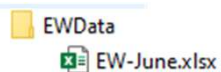
Add an **additional** .xlsx file to the EWData folder

Check that the import is successful



Read the errors carefully and adapt your data or M-Code as needed

Success!

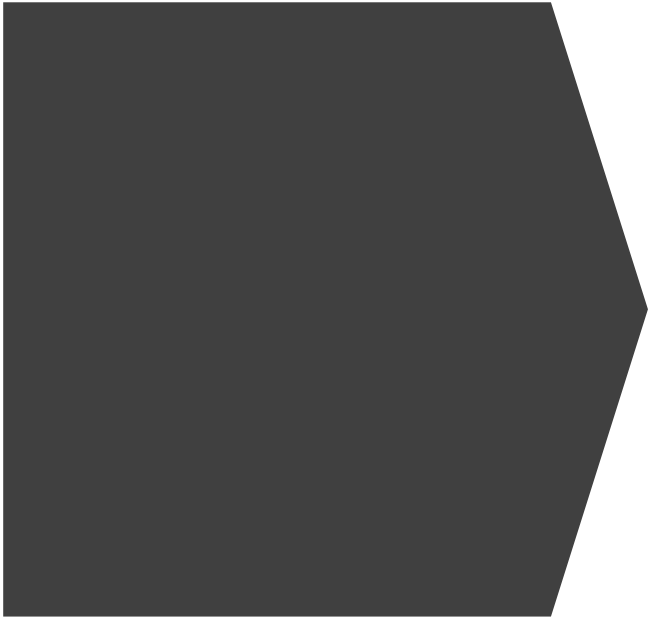


Successive data loads will show reflect the updated data

WORKSHOP INFORMATION			
Advanced Excel, Business Data Analysis, Communication Workshop, etc.			
June			
200	52	£381,200	100.00
Attendees	Courses	Total Spend	% Total Spend
Course Name		Total Spend	Attendees
Advanced Excel		£79,600	34
Business Data Analysis		£62,700	19
Communication Workshop		£66,300	51
S0443		£14,300	11
S4590		£6,500	5
S5500		£20,800	16
S6708			
S6908			
S7778			
Computer Literacy			
Total		£381,200	100

WORKSHOP INFORMATION			
Advanced Excel, Business Data Analysis, Communication Workshop, etc.			
July			
200	52	£381,200	100.00
Attendees	Courses	Total Spend	% Total Spend
Course Name		Total Spend	Attendees
Advanced Excel		£79,600	34
Business Data Analysis		£62,700	19
Communication Workshop		£66,300	51
S0443		£14,300	11
S4590		£6,500	5
S5500		£20,800	16
S6708			
S6908			
S7778			
Computer Literacy			
Total		£381,200	100

WORKSHOP INFORMATION			
Advanced Excel, Business Data Analysis, Communication Workshop, etc.			
Aug			
220	56	£414,800	100.00%
Attendees	Courses	Total Spend	% Total Spend
Course Name		Total Spend	Attendees
Advanced Excel		£79,600	34
Business Data Analysis		£62,700	19
Communication Workshop		£74,100	57
S0443		£14,300	11
S4590		£6,500	5
S5500		£27,300	21
S6708			
S6908			
S7778			
Computer Literacy		£8,300	4
Total		£414,800	100



END