EXERCISE 1

Clean up the data before **Importing the Data** into Excel

File: Invoices.accdb

1. Open a new workbook
2. Click the Data Tab
3. Move to the Get & Transform Group
4. Click on New Query
5. Point to From Database and select Microsoft Access Database
6. Move to the folder provided and select the Invoices.accdb file and Import
7. The list of tables will show
8. Click on the Invoice table and click Edit
9. The Query Editor will open
10. Transform the customer name to UPPER case
    a. Click on the InvoiceCustomer column
    b. Click the Transform Tab
    c. In the Text column group, click Format
    d. Click UPPER CASE
    e. Check out the result
    f. Click on the InvoiceDate column
    g. Click on the Transform Tab
    h. In the Date & Time column group, click Date only
    i. Check out the result
11. Load the data to Excel
    a. Click on the Home tab
    b. In the Close group, click on Close & Load
    c. Check out the result
    d. Rename the sheet tab to Invoices
    e. Close the Queries pane
    f. Save your workbook (i.e. Invoices)

EXERCISE 2

Set Connection Properties to Data you have imported to Excel

File: Transactions.accdb

1. Open a new workbook
2. Click the Data Tab
3. Move to the Get & Transform Group
4. Click on New Query
5. Point to From Database and select Microsoft Access Database
6. Move to the folder provided and select the Transactions.accdb file and Import
7. Click on the Transaction table
8. Click on the Load button at the bottom of the page
9. Rename the worksheet "Transactions"
10. Move back to Access and change Eric's name to Michael. Save and close the database
11. Move back to Excel and click cell A2 on the transactions sheet tab
12. Click on the Data Tab, Connections Group
13. Click on the Refresh All dropdown arrow
14. Click Connection Properties
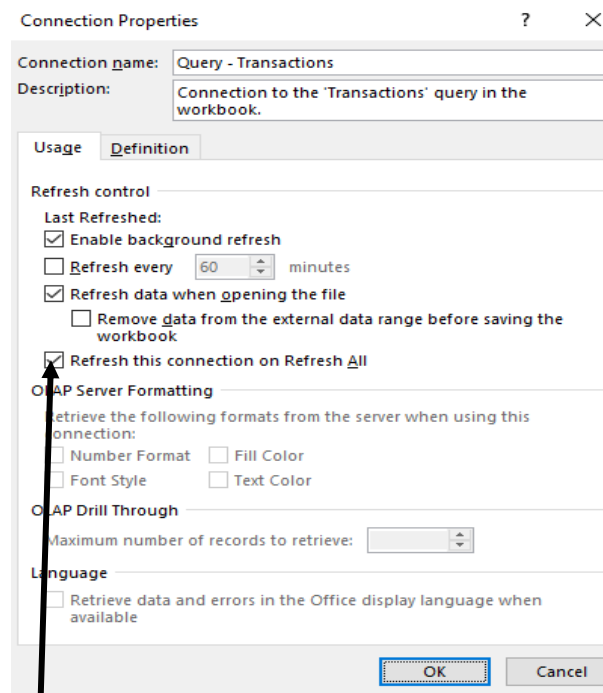
15. Check Refresh data when opening the file and click ok. The table imported from the database will now update every time the workbook is opened.
16. Click Refresh All in the connections group
17. The connected data is updated in the background
18. Check to see if Eric's name is replaced with Michael
19. Save the workbook as Transactions.xlsx

EXERCISE 3

Enable Data Analysis Add-Ins

File: Transactions.xlsx

1. File tab, Options
2. Click on Advanced
3. In the Data Group, select the Enable Data Analysis add-ins:
   a. Power Pivot
    b. Power View
    c. Power Map

Note: Available in Office 365 ProPlus and Enterprise subscriptions

4. Click on Ok
5. This adds the Power Pivot tab to the ribbon

Where is Power View?

The interactive visual experience provided by Power View is now available as part of Power BI Desktop. However, it is still supported in Excel 2016.

1. Even if you have enabled Power View, it may not show on the ribbon. In Excel 2016, the Power View button in the Insert, Reports was removed.
2. Click on the File tab, Options, Customize Ribbon
3. Under the **Main** tabs, click the tab (i.e. Insert) you want to add the new group and then click New Group
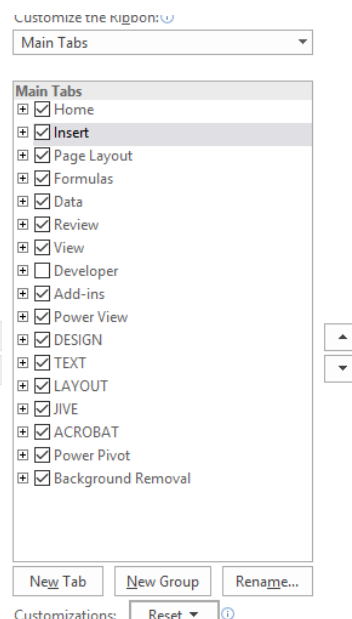
4. Under **Choose Commands from**, click **Commands Not in the Ribbon**. From the list, click **Insert a Power View Report**
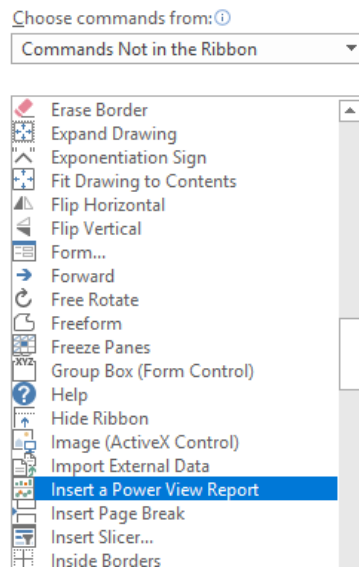
5. Select both **Insert a Power View Report** and **New Group (custom)** and click **Add**
6. Click **New Group (custom)**, Rename. In the **Display Name** box, type **Reports** (or the group name you want).
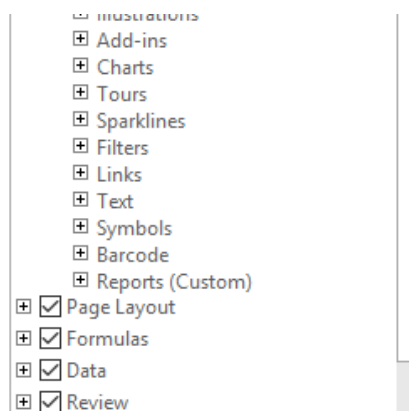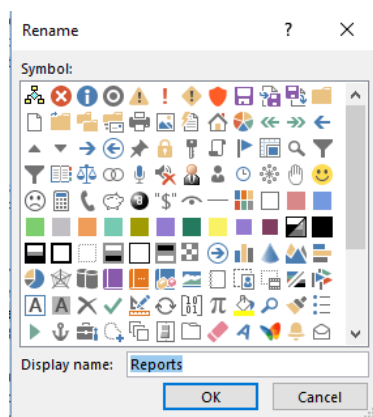
7. Click OK twice

Turn on the Power View add-in

The first time you insert a Power View sheet, Excel prompts you to turn on the Power View add-in

8. Open the Transactions.xlsx file
9. Click on Insert, Reports, Power View
10. Enable content
11. Create a chart
12. Save the file

EXERCISE 4

Use Power Pivot to model your data and create relationships

File: Transactions.xlsx

Create a Pivot table using Power Pivot

1. Open the Transactions.xlsx file
2. Click the Power Pivot tab, Click Manage in the Data Model group
3. Click the Home tab in the Power Pivot for Excel Window
4. The Power Pivot for Excel Window opens
5. Click Get External Data
6. Click From Other Sources
7. Click Text File, Click Next
8. The Table Import Wizard opens
9. To import the CSV text file, click Browse and open the Commission_Fee.csv file
10. Ensure comma is selected from the column separator box and use the first row as column headers
11. Click Finish
12. Click Close
13. You have returned to the Power Pivot for Excel window and the external data is displayed
14. Click Home, Click Pivot table in the pivot table group and select pivot table, new worksheet
15. Click Ok and rename the worksheet Commission
16. A new worksheet with a blank Pivot Table is opened
17. Expand the arrow and drag the transaction_ID to the Rows box and the commission_fee to the values box
18. Click the expand arrow for the transaction database imported earlier and drag the Broker_ID to the filters box
19. Click Create in the pivot table file relationship warning message
20. Create the following relationship and click ok
    - Commission_Fees   Transaction_ID
    - Transactions   Transaction_ID
21. Save your workbook