

Power Query & Power Pivot

Multi-table data models, ETL, and DAX — all in Excel.

◆ THIS CLASS AT A GLANCE

Standard Pivot Tables top out at one flat dataset. Power Query and Power Pivot let you build real data models — multiple tables, relationships, millions of rows — without leaving Excel. This class teaches you all three pieces in one day.

- Use Power Query to import and reshape data from any source
- Merge, append and clean datasets that refresh with one click
- Build relational data models with Power Pivot
- Write DAX measures that go beyond standard Pivot Tables
- Handle millions of rows without crashing Excel
- Lay the foundation for moving to Power BI

Power Query & Power Pivot

C O U R S E O V E R V I E W

If you have ever copied data between sheets to combine two datasets, written hundreds of XLOOKUPS, or hit Excel's row limit — this class is the way out.

Power Query handles the data plumbing (extract, transform, load). Power Pivot builds the model. DAX writes the formulas. By the end of the day you will have a working pipeline that refreshes itself.

HOW WE TEACH

Your instructor is a working Excel professional, not a presenter reading from slides.

Public classes have up to 6 students for maximum individual attention. Private team training scales to fit your group, however large.

Every concept is taught, then immediately practiced. You leave with the muscle memory, not just the notes.

WHO SHOULD ATTEND

Users with strong Excel foundations who want to level up with ETL and multi-table modeling.

Team members who routinely pull data from multiple sources to build unified reports.

Analysts hitting Excel's row limit or fighting slow workbooks.

Anyone planning to move into Power BI who wants a strong DAX foundation first.

WHAT YOU TAKE HOME

- Printed class binder with step-by-step labs and challenge exercises.
- Microsoft Excel exercise files — 1-year access included.
- Double-sided laminated keyboard shortcut guide.
- Certificate of completion plus 8 CPE credits (TSBPA accredited).

C L A S S E S S E N T I A L S

Level: Advanced

Format: In-person classroom or live online (always a live instructor)

Duration: 8 hours — 9:15 AM to 5:00 PM

Tuition: \$595 · includes all materials

Locations: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver · Live Online

Credits: 8 CPE credits — accredited through the Texas State Board of Public Accountancy

Power Query & Power Pivot

PROGRAM AGENDA — DETAILED COURSE OUTLINE

PROGRAM AGENDA

1. Power Suite Overview

- **What is what:** Power Query, Power Pivot and DAX explained
- **The Power Suite workflow:** how the three pieces fit together
- **Real-world examples:** Power Query and Power Pivot use cases

2. Power Query Data Loading

- **Common usage patterns:** Load to Table, Pivot, Chart, Connection-only or Data Model
- **Data connectors:** files, folders, web, database, Excel
- **Choosing a destination:** where the query output lands

3. Power Query Transformations

- **Basic transformations:** filtering, sorting, removing rows and columns
- **Text & numeric tools:** cleaning, splitting, calculated columns
- **Date tools:** extracting year/month/day, calculating durations
- **Indexes & conditional columns:** row numbers and IF-style logic
- **Grouping & summarizing:** rollup operations without Pivot Tables
- **Pivot & Unpivot:** reshaping data for analysis

4. Merging, Appending & Updating

- **Updating workbook queries:** Refresh All and per-query refresh
- **Merging queries:** joins on one or more columns
- **Appending queries:** stacking datasets vertically
- **Folder of files:** consolidating multiple files automatically
- **Power Query Editor & best practices:** naming, documenting, debugging

5. Data Modeling

- **Excel's Data Model:** what it is and why it matters
- **Data View vs. Diagram View:** two ways to work with the model
- **Normalization:** fact and dimension tables done right
- **Star schema design:** the most common reporting model
- **Fact vs. lookup tables:** how to tell them apart
- **Creating relationships:** joining tables without XLOOKUP
- **Cardinality:** 1-to-1, 1-to-many, many-to-many
- **Filter direction & hierarchies:** controlling how filters flow

6. Power Pivot and DAX

- **Creating a Power Pivot Table:** the model-driven Pivot
- **Power Pivot vs. normal Pivot:** what each one is for
- **DAX overview:** the formula language behind it all
- **Calculated columns:** row-level calculations stored in the model
- **Implicit vs. explicit measures:** AutoSum measures vs. authored measures
- **Filter context:** the single most important concept in DAX
- **Dimensions vs. measures:** what each one does

7. Popular DAX Functions

- **DAX syntax & operators:** writing your first DAX formula
- **Math, stats & counting:** SUM, AVERAGE, COUNT, DISTINCTCOUNT, COUNTROWS
- **Logical functions:** IF, AND, OR, SWITCH
- **Text functions:** LEN, CONCATENATE, UPPER, LOWER, PROPER, LEFT, MID, RIGHT, SEARCH, SUBSTITUTE
- **CALCULATE & filter context:** the heart of advanced DAX
- **FILTER, ALL, RELATED:** shaping filter context
- **Iterator (X) functions:** SUMX, RANKX and row-by-row calculations
- **Time intelligence:** year-to-date, prior period, rolling averages



A L T E R N A T I V E T O Y O U R M A N A G E R

Use this template to request approval. Customize the bracketed parts and send.

Dear [Manager's Name],

I would like to request approval to attend the Excel Power Query & Power Pivot class offered by Excel Experts. It is a one-day, hands-on class that will dramatically expand what I can do with data in Excel — exactly what I need on [team / project / report name].

What I'll bring back to the team

- **Automated ETL** — data pipelines that refresh with one click instead of manual rebuilding.
- **Multi-table data models** — real relational analysis without thousands of XLOOKUPS.
- **DAX measures** — calculations that go far beyond what standard Pivot Tables can do.
- **Massive dataset handling** — millions of rows without Excel crashing.
- **A Power BI head start** — the same Power Query and DAX engines used in Power BI.

Why this class specifically

- **One full day** — no multi-week commitment; minimal disruption to my workload.
- **Taught by a working Excel professional** — not a recorded video or a generic presenter.
- **Small public classes (up to 6 students)** — or live online if travel is a concern; private team training is also available.
- **8 CPE credits included** — accredited through the Texas State Board of Public Accountancy.
- **Locally available** — Dallas-Fort Worth, Houston, Austin, Oklahoma City, Denver, or live online.

The investment

- **Tuition:** \$595
- **Time out of office:** 1 business day
- **Included materials:** printed class binder, Excel exercise files (1-year access), laminated shortcut guide, certificate of completion

I expect to recover the time investment within the first month just by replacing manual data preparation with automated Power Query refreshes — and I will be able to share what I learn with the rest of the team.

Class details and online registration: dfwexcel.com/excel-power-query-and-power-pivot-class/

Questions: 817-841-9560

Thank you for considering this. I would appreciate your approval to enroll.

Sincerely,

[Your Name]

REGISTRATION

Enroll Today!

Online: dfwexcel.com

Phone: 817-841-9560

Price: \$595

Format: In-person classroom or live online

Cities: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver

TRAIN YOUR TEAM

Bring Excel Experts to your office:

- Private group training on your schedule
- Tailored to your team's industry and data
- On-site, at our classrooms, or virtual
- 1-on-1 coaching also available

dfwexcel.com/excel-experts-train-your-team/