

# Business Intelligence – Concepts and Excel Tools

*Get, Transform and Visualize your data to  
Drive Performance*

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# Business Intelligence – A Four part series

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- ▶ **Fundamentals of Business Intelligence**  
Wednesday October 17, 2018 12-1 pm
- ▶ **Get and Transform your Data – Power Query**  
Tuesday October 30, 2018 12-1 pm
- ▶ **Data models and data visualization**  
Wednesday November 7, 2018 12-1 pm
- ▶ **Office Hours: Tuesday November 13, 2018 12-1 pm**

# Learning Objectives

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- ▶ **Gain a better understanding of the concepts related to business intelligence**
- ▶ **Become aware of the functionality in Excel that supports data analysis and data visualization including: tables, pivot tables, pivot charts, power query, power pivot, and data analytic expressions.**
- ▶ **Witness how the excel functionality can be applied in your organization through the demonstration of a BI productivity monitoring tool**

# Part 4: Office Hours

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# The Challenges

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- ▶ The need for timely and accurate information necessary to inform our decisions is increasing at a rapid pace
- ▶ Data informed decisions will be one of the keys to success in a value based environment
- ▶ Data is created in different applications, may be stored in different locations, and may have different formats
- ▶ It is becoming increasingly important to join data from different sources to create a “complete” picture of your environment
- ▶ Data must be provided to our end users in an easy to use and easy to understand visual format

# Where to start

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- ▶ Create a strategy for gathering, storing, analyzing and providing data to end users based upon the concept of Business Intelligence (BI)
- ▶ Leverage your current resources by using the BI tools that are currently in Microsoft Excel
- ▶ Create a data informed environment by providing information to your end users and by embracing the concept of self-service analytics

# Business Intelligence

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*Business intelligence is a term that refers to skills, processes, technologies, applications and practices used to support evidence-based decision making in organizations. It can be defined as approaches for gathering, storing, analyzing, and providing data that helps users to gain insights and make better fact-based decisions.*

# Business Intelligence

## Gathering Data

Processes and tools used to access, cleanse, integrate, and aggregate information used for reporting and analysis

## Examples

- Using a query tool to directly access a database or other data sources.



# Business Intelligence Tools

## Get and Transform

Excel features that provides fast, easy data gathering and shaping capabilities. Enables you to connect, combine, and refine data sources to meet your analysis needs.

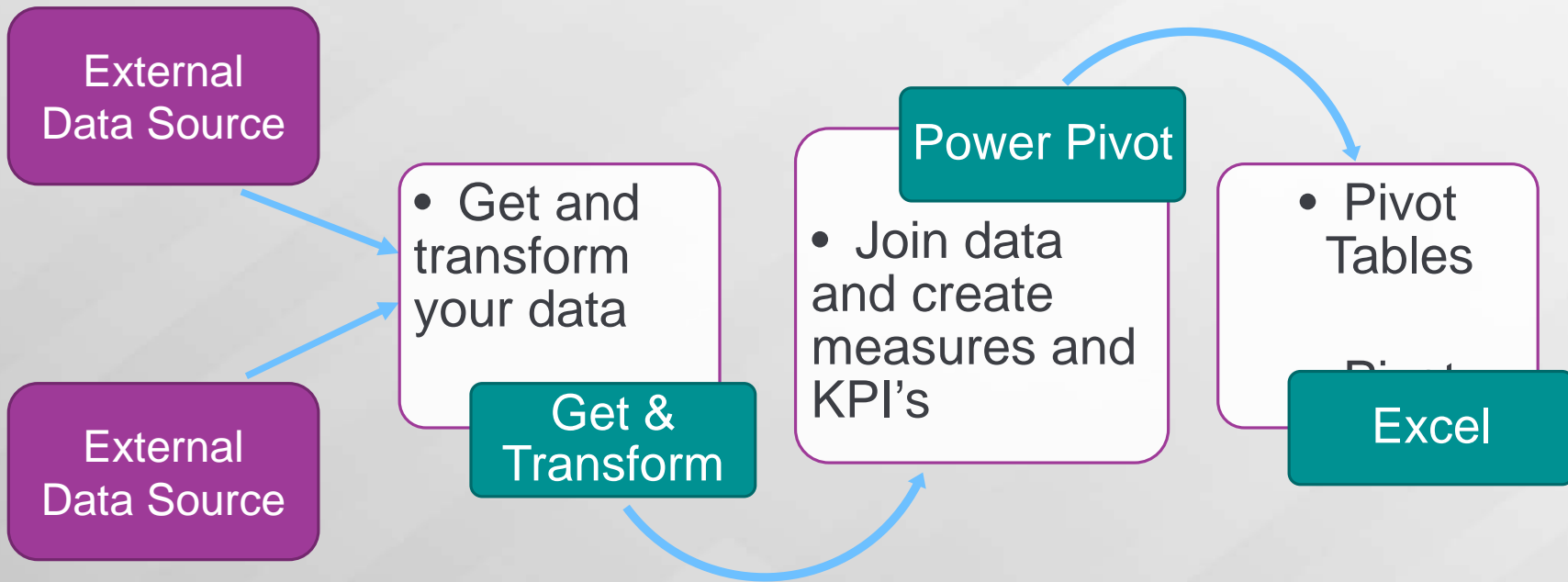
## How to use

- Create a query (data request) in your workbook that connects to a data source
- Transform your data to make it useable
- Load your data into a table or a data model

# Business Intelligence Tools

## Data model

A set of functions within Excel that allows you to integrate data from multiple tables effectively building a relational data source inside an Excel workbook. Data models provide tabular data used in PivotTables and Pivot Charts.



# Demonstration

Creating a simple dashboard using:

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Get and Transform

Power Pivot

Pivot Tables

Pivot Charts

# Resources

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- ▶ **powerpivot(pro): <https://powerpivotpro.com/>**
  - Online training, books, blogs, training classes
- ▶ **Introduction to Get & Transform (Power Query) for Excel: <https://support.office.com/en-us/article/get-transform-in-excel-881c63c6-37c5-4ca2-b616-59e18d75b4de>**
- ▶ **Power Pivot: Powerful data analysis and data modeling in Excel: <https://support.office.com/en-us/article/Power-Pivot-Powerful-data-analysis-and-data-modeling-in-Excel-A9C2C6E2-CC49-4976-A7D7-40896795D045>**

# Questions?

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# THANK YOU FOR ATTENDING TODAY'S WEBINAR!

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- ▶ Check out our website: [www.ctacny.org](http://www.ctacny.org)



- ▶ MCTAC email: [mctac.info@nyu.edu](mailto:mctac.info@nyu.edu)