Demo & Step by Step Guide

Analyzing SQL Server Data using PowerPivot in MS Excel

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Activate Power Pivot MS Excel add-in

- 1. Open MS Excel 2013\2016
- 2. Go to File > Options > Add-Ins
- 3. In the Manage box, click COM Add-ins> Go
- 4. Check the Microsoft Office Power Pivot & Power View boxes

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Location:	C:\Program Files\Microsoft Office 15\Root\Office15\ADDINS\PowerPivot Excel Add-in\PowerPivotExcelClie	ntAddin.dll	
Load Behavior:	Load at Startup		

Excel 2013

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Location: C:\Program Files\Microsoft Office\Root\Office16\ADDINS\PowerPivot Excel Add-in\PowerPivotExcelClientAddIn.dll

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Load Behavior: Load at Startup
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Excel 2016

Power Pivot tab

- 1. Click the **Power Pivot** tab
 - a. This is the tab where you work with Power Pivot PivotTables, calculated fields, and key performance indicators (KPIs), and creating linked tables

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2. Click Manage to open the Power Pivot window

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Import Data from SQL Server

- In the Power Pivot window, click Get External Data > From Database > From SQL Server
- 2. In Connect to Microsoft SQL Server Database, in Server or File Name, enter the

name of SQL Server instance where your Data Warehouse is located.

- 3. Click the down arrow to the right of the **Database name** list, and select an Analysis Services database from the list
- 4. Click **Test Connection** to verify that the server is available.
- 5. Click Next

Table Import Wizard	?	×
Connect to a Microsoft SQL Server Database		

Friendly connection name:	SqlServer LAPTOP-P3AJK7V7	HealthCareCCCD			
Server name:	LAPTOP-P3AJK7V7				~
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- 6. On the **Choose How to Import the Data** screen click the radial button for **Select from a list of tables and views to choose the data to import**
- 7. Click Next
- 8. Select the tables and views that you want included.
 - a. You can change any **Source Table** name to **Friendly Name**
 - b. You can click **Preview and Filter** to exclude columns and data
- 9. Click **Finish** to complete import process

Table Import Wizard

Select Tables and Views

Select the tables and views that you want to import data from.

		Source Table	Schema	Friendly Name	Filter Details	
		EDWPHARM	dbo			
		EDWPROCE	dbo			
		EDWREVEN	dbo			
		EDWSNIPS	dbo			
		P1BPDDK7	dbo			
		P1BPDK7-COS	dbo			
		P1BPDK7-ESC	dbo			
		P1BPDK7-PT	dbo			
	٦	Claim	dbo			
		Doctor	dbo			
~	đ	MedicalClaim	dbo	Claim		
~		MedicalPatient	dbo	Patient		
~		MedicalProvider	dbo	Provider		
		Patient	dbo			
				- 10 ²		
					Select Related Tables	Preview & Filte

Table Import Wizard

Importing The import operation might take several minutes to complete. To stop the import operation, click the Stop Import button.

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	Success		Success: 3	Error: (
De	tails:			
	Work Item	Status	M	essage
0	Claim	Success. 375,728 rows transferred.		
0	Patient	Success. 51 rows transferred.		
0	Provider	Success. 51 rows transferred.		

Completed Data Import (below)

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Diagram View - Table Relationships

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Save the Model Project

It is important to frequently save your model project.

To save the model project

• In SQL Server Data Tools, click on the File menu, and then click Save All.

Review Existing Relationships and Add New Relationships

A relationship is a connection between two tables that establishes how the data in those tables should be correlated. For example, the Product table and the Product Subcategory table have a relationship based on the fact that each product belongs to a subcategory.

When you imported data by using the Table Import Wizard, you imported seven tables from the AdventureWorksDW database. Generally, if you import data from a relational source, existing relationships are automatically imported together with the data. However, before you proceed with authoring your model you should verify those relationships between tables were created properly. For this tutorial, you will also add three new relationships.

To add new relationships between tables

- 1. In the model designer, in the **Provider** table, click and hold on the **ProviderID** column, then drag the cursor to the **Claim** column in the **Provider** table, and then release.
 - A solid line appears showing you have created an active relationship between the **ProviderID** column in the **Provider** table and the **ProviderID** column in the **Claim** table.
- 2. In the **Patient** table, click and hold on the **RecipientID** column, then drag the cursor to the **RecipientID** column in the **Claim** table, and then release.
 - a. A dotted line appears showing you have created an inactive relationship between the **RecipientID** column in the **Patient** table and the **RecipientID** column in the **Claim** table. You can have multiple relationships between tables, but only one relationship can be active at a time.



To review existing relationships

- 1. Using the top Ribbon, click Home, under the View section click Diagram View.
 - a. The model designer now appears in Diagram View, a graphical format displaying all of the tables you imported with lines between them. The lines between tables indicate the relationships that were automatically created when you imported the data.
 - b. Use the minimap controls in the lower-right corner of the model designer to adjust the view to include as many of the tables as possible. You can also click and drag tables to different locations, bringing tables closer together, or putting them in a particular order. Moving tables does not affect the relationships already between the tables. To view all of the columns in a particular table, click and drag on a table edge to expand or make it smaller.

Create a Calculated Column

A calculated column is a column created by a dax formula that creates a value by calculating data that already exists in the model.

Create a calculated column in the Provider table

1. sing the top Ribbon, click Home, under the View section click Data View.

- a. Calculated columns can only be created by using the model designer in Data View.
- 2. In the model designer, click the **Provider** table (tab).
- 3. Right-click the *Add Column* column header, and then click **Insert Column**.

tate 📘	🖌 ZipCode 💽	Add Copy
VA	98011	insert Column
VA	98011	Rename Column
VA	98011	

- 4. A new column named **Calculated Column 1** is inserted to the right of the **ZipCode** column.
- 5. In the formula bar above the table, type the following formula. AutoComplete helps you type the fully qualified names of columns and tables, and lists the functions that are available.
 - a. =[Title]&" "&[FirstName]&" "&[LastName]
 - b. When you have finished building the formula, press ENTER.
 - c. Values are then populated for all the rows in the calculated column. If you scroll down through the table, you will see that rows can have different values for this column, based on the data that is in each row.
- 6. Rename this column to **FullName**.

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3 0	36087664	CDR	James	Rhodes	40 Ellis St.	Bothell	WA	98011	CDR James Rhodes
4 0	36066429	Dr	Everett	Thomas	6387 Scenic Av	Bothell	WA	98011	Dr Everett Thomas
5 2	64319386	Dr	Jennifer	Pierce	5747 Shirley Dr	Bothell	WA	98011	Dr Jennifer Pierce

Create a Measure

Similar to the calculated columns you created in the previous lesson, a measure is essentially a calculation created using a DAX formula. However, unlike calculated columns, measures are evaluated based on a user selected *filter*; for example, a particular column or slicer added to the Row Labels field in a PivotTable. A value for each cell in the filter is then calculated by the applied measure. Measures are powerful, flexible calculations that you will want to include in almost all tabular models, to perform dynamic calculations on numerical data.

To create a Daily Average Number of Claims measure in the Claim table

- 1. Click the **Claim** table(tab).
- 2. In the measure grid (lower pane under the dark grey line), click the top-left empty cell.
- 3. In the formula bar, above the table, type the following formula:
 - a. Total Claims:=DISTINCTCOUNT([DCN])
 - b. When you have finished building the formula, press ENTER.
- 4. Create a second measure in the below cell, type the following formula:
 - a. Daily Avg Claims:=[Total Claims]/DISTINCTCOUNT([AdjudicatedDt])
 - b. When you have finished building the formula, press ENTER.

DCN S	🖌 ServiceLineNbr 💽	RejectionStatusCd	💽 Recipi 🞲 🖿	AdjudicatedDt 🛛 💌	ServiceFro
201400000071385	01	N	000001172	9/16/2012	8/
201400000079183	01	N	000001474	3/23/2013	3
20140000082842	01	N	00000722	6/22/2013	4/
20140000086777	01	N	00000090	6/5/2013	5
20140000093386	01	N	000001585	6/26/2013	5/
20140000093400	01	N	00000094	6/26/2013	5/
20140000093412	01	N	00000094	6/26/2013	5/
20140000093417	01	N	000001226	6/26/2013	5/
20140000090492	01	N	000001355	6/22/2013	5/
20140000090506	01	N	000001355	6/8/2013	5/
20140000090947	01	N	00000778	6/22/2013	5/
20140000092097	01	N	00000985	6/22/2013	5/
201400000099715	01	N	00000983	7/6/2013	6/
20140000099722	01	N	00000984	7/6/2013	6/
	01	••	000004474	10/10/10010	~ (
Total Claims: 357477					
Daily Avg Claims: 156.171690694626					

5. You can format the numeric measure value by the right clicking the cell and selecting Format.

20140000099722	01	N			
	~*				
Total Claims: 357477		1			
Daily Avg Claims: 156.171690694626	Cut	Ctrl+X			
	Сору	Ctrl+C			
	Paste	Ctrl+V			
	Delete	Del			
	Create KPI				
	Hide from Client Tools				
laim Patient Provider	Format				
	Description				

6. Once the Formatting Window opens you can then specify how you want to display the numeric value. For our example we utilize the Decimal Number format and then specify the number of decimal places.

Formatting				? ×
Category:				
General	^	Format:	Decimal Number	~
Number Currency	~	Decimal places:	2 🗘	
		Use 1000 separator (,)		
			ОК	Cancel

6. Click Ok.

	~
Total Claims: 357477	
Daily Avg Claims: 156.17	
During High Balance 200127	

Create Key Performance Indicators

Key Performance Indicators (KPIs) are used to gauge performance of a value, defined by a *Base* measure, against a *Target* value, also defined by a measure or by an absolute value. In reporting client applications, KPIs can provide business professionals a quick and easy way to understand a summary of business success or to identify trends.

To create a Daily Average Claim Performance KPI

- 1. In the model designer, click the **Claim** table (tab).
- 2. In the measure grid, right-click the **Daily Avg Claims** measure, and then click **Create KPI**.
 - a. The Key Performance Indicator dialog box opens.
- 3. In the **Key Performance Indicator (KPI)** dialog box, in **Target**, select the **Absolute Value** option.
- 4. In the **Absolute Value** field, type **15**, and then press ENTER.
- 5. In the left (low) slider field, type 6, and then in the right (high) slider field, type 12.
- 6. In Select Icon Style, select the first (red), (yellow), (green) icon type.
- 7. Click **OK** to complete the KPI.
 - a. In the measure grid, notice the icon next to the **Internet Current Quarter Sales Performance** measure. This icon indicates that this measure serves as a Base value for a KPI.

Key Performance Indicator (KPI)

? ×



Create a Hierarchy

Hierarchies are metadata that define relationships between two or more columns in a table, thus defining the relative position of column to another column.

To create a Category hierarchy in the Patient table

- 1. Using the top Ribbon, click Home, under the View section click Diagram View.
- 2. Right-click the **Patient** table, and then click **Create Hierarchy**. A new hierarchy appears at the bottom of the table window.
- 3. In the hierarchy name, rename the hierarchy by typing **PatientLocation**, and then press ENTER.
- 4. In the **Patient** table, right click the **State** column, in the pop up box go to **Add to Hierarchy** and then click **Locations**.
- 5. In the **Patient** table, click the **City** column, then drag it to the **Locations** hierarchy, releasing it below **State**.
- 6. In the **Patient** table, click the **ZipCode** column, then drag it to the **Locations** hierarchy, releasing it below **City**.

- 7. In the **Patient** table, click the **Address** column, then drag it to the **Locations** hierarchy, releasing it below **ZipCode**.
- 8. In the **Locations** hierarchy, right-click the **State** column, then click **Rename**, and then type **StateProvince**.
- 9. Note: Ensure that the columns in the hierarchy are in logical order. Typically the column with the least uniqueness (based on business) should be near the top of the list and the column with the highest uniqueness (based on the business) should be near the bottom of the list.



Create a PivotTable

- 1. While in **PowerPivot** click the **PivotTable** button
 - On the Create PivotTable screen select New Worksheet
 - a. A new PivotTable Worksheet is created
- 3. Under **PivotTable Fields** do the following
 - a. Go to **Provider**. Select **FullName**.
 - b. Go to Patient. Select PatientLocation.
 - c. Go to Claim > Daily Avg Claims, Select Value and Status.
- 4. Give it a title

2.

5. Complete. You've created a **PivotTable**

<u>Note</u>: Use the **Filters** pane (in PivotTable Fields pane) to only display specific data that you want shown in yourPivotTable.

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Create a Power View Workbook

- 1. Navigate back to your excel workbook to display your previously created PivotTable
- 2. Using the top Ribbon, go to Insert and then click the Power View button
- 3. Excel creates a Power View Sheet with your data model in the Field List

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- 4. In the Power View Fields list do the following
 - a. Go to **Patient**. Select **FullName**.
 - b. Go to Claim > Daily Avg Claims, Select Value and Status.
- 5. Go to Design, (In the Switch Visualizations section) go to Other Chart and Select Pie.
- 6. Go to Layout, (In the Labels section) go to Title and Select None.
- 7. Drag the edges of the Chart so that it spaced across the top half of the pane.
- 8. Right Click the white space within the chart and click **Copy**. Then Right Click the white space below the chart and select **Paste**.
- 9. Go to Design, (In the Switch Visualizations section) go to Column Chart and Select Clustured Column.

Filter the data

- 1. In the Power View Fields Pane, Go to Claim and find Year
- 2. Drag **Year** to the **Filters** pane
 - a. Year will now display in the Filters pane



- 3. Click on the **Advanced Filter Mode** button next to Year in the Filter pane
- 4. Select radial box with the most current year
- 5. The Power View displays the charts for the most current year
- 6. Click where it says, "Click here to add a title" and give it a title.
- 7. Complete, you've created a **Power View** report.

<u>Note</u>: **Interactivity**: By clicking on any part of either chart, the visualization will interact and react to your selection by highlighting/emphasizing your specific

Filters < X VIEW | CHART Year XSE is 2015 (All) 2005 2006 2007 2008 2009 2010 2011 33518 2012 2013 2014 64745 2015 900

<u>Note</u>: **Interactivity**: Direct your mouse/pointer to any portion of your

chart - PowerView will display additional data about that specific section

<u>Note</u>: You can change or add to the view by making additional selection from the **Power View Fields** pane



END