

# Index

## #

- #All special item, 63
- #Data special item, 62
- #Header special item, 63
- #ThisRow special item, 63
- #Totals special item, 63

## 2

- 2019
  - version of Excel. *See* Excel

## 3

- 32-bit version of Excel compared to 64-bit version, 456
- 365
  - version of Excel. *See* Excel
- 3D map
  - animation, creating from temporal data, 386
  - animation, different methods explained, 386
  - annotation, adding to, 384
  - bubble visualization, 378, 380
  - categories, visualizing multiple, 380
  - category field, adding, 380
  - clustered column visualization, 378
  - creating, 366
  - custom image, using with, 382
  - data card, customizing, 374
  - edit time dialog, 386
  - filter, applying to, 372
  - fly over maps, how to, 388
  - geocoding, explained, 368
  - heat map visualization, 378
  - height field, adding, 376
  - image, adding to annotation, 384
  - layer options, setting, 374
  - layers, hiding and showing, 382
  - layers, using multiple, 382
  - location markers, changing opacity of, 374
  - location markers, changing size and color of, 374
  - location pane, using, 370
  - longitude and latitude, correct formatting of values for, 382
  - longitude and latitude, explained, 382
  - map labels, using, 370

- map, re-positioning, 372
- mapping confidence dialog, 369
- mercator projection, explained, 370
- MP4 file, saving video as, 386
- overview, 363
- pie chart visualization, 380
- region visualization, 378
- rotating, left and right, 376
- scene options, setting, 388
- scene, adding new, 390
- scenes, understanding, 388
- scenes, working with multiple, 390
- stacked column visualization, 380
- task panes, hiding and showing, 372
- temporal data, creating video from, 386
- temporal data, explained, 366
- text box, adding to, 384
- tilting, up and down, 376
- time scrubber, using to navigate video, 386
- time values, formatting, 386
- transition effects, setting, 388, 390
- video resolution, options explained, 386
- video, creating from temporal data, 386
- video, saving as MP4 file, 386
- visualization, different types explained, 378
- X and Y co-ordinates, using with custom image, 382
- zoom, in and out of, 370

## 6

- 64-bit version of Excel compared to 32-bit version, 456

## A

- absolute and relative cell references, 116
- access database
  - limitations of, 440
- activate
  - pivot table, 307
- ActiveX controls, 260
- add-in
  - power pivot, installing, 458
  - solver, 216
- advanced filter. *See* filter
- ALL, DAX function, 524
- Analysis Services. *See* SSAS
- AND function, 136

apply names command, 173  
asymmetric  
    creating using named sets, 496  
audio cues, enabling, 28  
AutoComplete, 108  
    enabling and disabling, 108  
    formula entry using, 108  
AutoFill, 65  
AutoFilter. *See also* filter  
    custom, 31, 32  
    range, applying to, 30  
automatic calculation, 138  
AVERAGE function, 108

## B

background error checking, enabling and  
    disabling, 188  
base value  
    in kpi, 518  
big data  
    ability of OLAP pivot tables to work with, 468  
    defined, 440  
    get & transform queries, using to work with,  
        400  
    modern data analysis, support for, 470  
    pivot table, using to analyze, 440  
boolean criteria, 136  
business intelligence. *See also* OLAP; power pivot  
    defined, 468  
business rules, explained, 84  
button control (form control), 292

## C

calculate sheet command, 133  
CALCULATE, DAX function, 520  
calculated column. *See* power pivot; get &  
    transform  
calculated columns  
    in tables, switching on, 64  
calculated field. *See* power pivot, *See* pivot table  
calculated item. *See* pivot table  
calculated measure. *See* power pivot  
calculated measure dialog. *See* power pivot  
calculation options (manual and automatic), 138  
calendar table. *See* data modeling  
case sensitive filter, implementing, 39  
cell link, of form controls, setting, 264  
cells, 54  
    hiding values in using a custom format, 209  
    input and result, 206

    locking to prevent users changing them, 226  
    merging, 177  
    speaking, 198  
    unlocking, 227, 277  
    watch window, monitoring values in, 196  
channels. *See* update channels  
chart source data  
    hidden and empty cells button, 277  
charts. *See also* pivot chart; chart source data  
    bar chart, creating, 74  
    gant chart, 124  
    hidden and empty cells button, 277  
    pie charts, 276  
    temperature gauge, creating, 272  
check box (form control), 268  
classic data analysis  
    defined, 470  
cleansing data. *See* get & transform  
clear filters command (pivot table), 324  
collapsing and expanding an outline, 77  
combo box (form control), 262  
CONCATENATE function, 142  
concatenation operator (&), 140  
conditional formatting. *See also* visualizations  
connection. *See also* get & transform  
    explained, 402  
    properties, 402  
    queries and connections task pane, 460  
    refresh automatically at timed interval, 402  
consolidate data from multiple ranges, 80  
constants, named constants, 171  
context. *See* power pivot  
controls  
    ActiveX and form, differences between, 261  
    button control (form control) adding, 292  
    cell link of form controls, setting, 264  
    check box (form control), adding, 268  
    check box (form control), use value of, 270  
    combo box (form control), adding, 262  
    form and ActiveX, differences between, 261  
    group box (form control), adding, 260  
    input range, setting for combo box (form  
        control), 263  
    option button (form control), adding, 260  
COUNT function, 108  
COUNTA function, 179  
COUNTIF function, 98, 116  
creating from selection command, 174  
criteria range, creating, for advanced filter, 34  
CSV files, splitting into columns, 74  
cube. *See* data model

- custom filter, 31
- custom formatting codes, 142, 209
- custom lists
  - creating, 56
  - sorting by, 56
- custom styles, use in pivot tables, 328
- custom views, creating and viewing, 220

## D

- data
  - delimited and fixed width, 73
  - input messages, 88
  - validation, 84
- data cleansing. *See* get & transform
- data model. *See also* OLAP pivot table; OLAP; Power Pivot
  - calendar table, adding to, 486
  - created by specialized staff for use by regular users, 364
  - creating, from a relational database, 474
  - CUBEVALUE function, using to retrieve data from, 492
  - foreign key, explained, 432
  - formatting values in, 488
  - get & transform query, connecting directly to, 400
  - hiding columns in, 484
  - MDX code, used within CUBEVALUE function, 493
  - MDX query language, described, 490, 493
  - memory issues when using, 364, 456
  - memory issues, solving by hosting model on SSAS, 456
  - OLAP pivot table, creating from, 466, 468
  - primary key, explained, 432
  - relationship, many-to-many, explained, 472
  - relationship, one-to-many, explained, 472
  - removing columns from, 484
  - renaming columns in, 484
  - snowflake data model, creating, from relational database, 480
  - star data model, converting snowflake data model into, 482
- data modeling. *See also* Power Pivot
  - calendar table, adding to data model, 486
  - formatting values in, 488
  - OLAP database design explained, 478
  - OLTP database design explained, 476, 478
  - overview, 453
  - snowflake data model, creating from relational database, 480
  - snowflake schema, 478
  - star data model, converting snowflake data model into, 482
  - star schema, 478
- data munging. *See* get & transform
- data pre-processing. *See* get & transform
- data scrubbing. *See* get & transform
- data shaping. *See* get & transform
- data table
  - column input cell, 207
  - row input cell, 207
  - single-input, creating, 206, 274
  - two-input, creating, 208
- data types, 408, *See also* get & transform
  - get & transform supported data types, defined, 408
  - setting in get & transform, 410
- data wrangling. *See* get & transform
- database. *See* relational database; data model
- DATE function, 126
- date of birth, calculating from age, 122
- DATEDIF function, 122
- dates and times
  - 24-hour format, applying, 128
  - age, calculating from date of birth, 122
  - current date, entering as non volatile, 121
  - DATE function, 126
  - DATEDIF function, 122
  - DAY function, 120
  - days between two dates, calculating, 122
  - difference in days between two dates, calculating, 119
  - formatting, changing default, 128
  - HOUR function, 132
  - midnight, time calculations that span, 130
  - MINUTE function, 132
  - minutes, converting to hours and minutes, 38
  - MONTH function, 120
  - monthly totals, group into using a pivot table, 342
  - months between two dates, calculating, 122
  - NOW function, 132
  - offset days, months and years, 126
  - offsetting a date by a specific interval, 124
  - SECOND function, 132
  - serial number, explained, 118
  - TIME function, 134
  - time value, containment within dates, 118
  - time, entering a non volatile current time, 133
  - TODAY function, 120
  - transforming using get & transform, 418

- YEAR function, 120
- years between two dates, calculating, 122
- DAX. *See* power pivot; functions
- DAY function, 120
- delimited and fixed width data, 73, 74, 406
- de-normalized data. *See* get & transform
- dependents, tracing, 194
- developer tab, enabling, 260
- digital certificates, 230
- digital signatures, 232
- dimension table, 478
- DISTINCTCOUNT, DAX function, 516
- downloading the sample files, 19, 30
- Dr Codd's third normal form rules, 72, 442
- drill-down
  - OLAP pivot table, in, 490
- drill-down, pivot table, into fields, 307
- duplicate entries, removing from tables, 96

## E

- e-mail, hyperlink, used to send, 246
- error alert messages, 86
- errors
  - #DIV/0!, eliminating with the IF function, 114
  - #DIV/0!, explained, 184
  - #NA, explained, 184
  - #NAME?, explained, 184
  - #NULL!, explained, 186
  - #NUM, explained, 184
  - #REF!, explained, 186
  - #VALUE!, explained, 186
  - background checking, detecting with, 188
  - background checking, enabling and disabling, 188
  - green triangle indicators, enabling and disabling, 188
  - green triangle, visual indicator of, 188
  - IFERROR function, 152
  - manually checking for, 190
  - solving, 184
  - trace dependents tool, 194
  - trace error tool, 193
  - trace precedence tool, 192
  - watch window, using to monitor cell values, 196
- ETL. *See* get & transform
- evaluate formula command, 107
- evaluation context. *See* power pivot
- EXACT function, 39
- Excel
  - 2019 and 365, differences between, 1
    - 2019 version of, 1
    - 32 and 64 bit version of, 456
    - 32 bit and 64 bit version of, 366, 440
    - 365 version of, 1
    - how to tell which version you are using, 1
    - locale used to write this book, 19
    - semi-annual update schedule, 1
  - extract. *See* get & transform
  - extract, transform and load. *See* get & transform

## F

- fact table, 478
- files. *See also* workbooks
  - macro-enabled workbook format, 282
  - objects, creating from, 252
  - objects, linking to, 252
- filter. *See also* AutoFilter
  - advanced, 34, 36, 38
  - advanced with multiple OR criteria, applying, 34
  - by color, 33
  - by selection, 31
  - case sensitive, implementing, 39
  - clearing, 32
  - criteria range, 34, 36
  - custom, 31, 32
  - exact and inexact, creating, 35
  - extract records to a different worksheet using, 41
  - extracting random rows from a range using, 38
  - function-driven, 38
  - list range, 36
  - pivot table, 314, 316
  - range, applying to, 30
  - removing, 31
  - removing advanced, 37
  - slicers, filtering pivot tables with, 318
  - top 10, 32
  - unique records, extracting using, 40
  - wildcards, use of in criteria, 35
- filter context. *See* power pivot
- FIND function, 146
- fixed width and delimited data, 73, 74
- foreign key. *See also* data model
  - explained, 432
  - naming convention, 432
- formatting. *See also* themes
  - 24 hour time, 128
  - custom format strings, using, 142
  - data model values using power pivot, 488
  - date, changing default, 128

- hiding values in cells using a custom format, 209
- numbers in a pivot table, 307
- power pivot, with, 488
- slicers, 319
- TEXT function, to format numerical values as strings, 142
- time, changing default, 128
- forms. *See* controls
- formulas. *See also* functions
  - auditing by tracing precedents, 192
  - AutoComplete, creating with, 175
  - AutoComplete, enabling and disabling, 108
  - hiding to prevent viewing of, 227
  - range names, pasting into, 181
  - syntax box, understanding, 108, 109
  - trace dependents tool, 194
  - trace error tool, 193
- frequency distribution, 344
- functions. *See also* formulas
  - ALL, DAX function, 524
  - AND, 136
  - AutoComplete, 108
  - AutoComplete, enabling and disabling, 108
  - AVERAGE, 108
  - CALCULATE, DAX function, 520
  - CONCATENATE, 142
  - COUNT, 108
  - COUNTA, 179
  - COUNTIF, 98, 116
  - CUBEMEMBER, 494
  - CUBEVALUE, 492
  - DATE, 126
  - DATEDIF, 122
  - DAY, 120
  - DISTINCTCOUNT, DAX function, 516
  - evaluating with the *evaluate formula* command, 107
  - EXACT, 39
  - FIND, 146
  - FV, 112
  - GETPIVOTDATA, 350
  - HLOOKUP, 154
  - HOUR, 132
  - IF, 114
  - IF, avoiding nesting using VLOOKUP, 115
  - IFERROR, 152
  - IFS, 160
  - INDEX, 151, 158
  - INDIRECT, 176
  - INT, 38

- LEFT, 144
- LEN, 146
- MATCH, 151, 156
- MAX, 108
- MID, 144
- MIN, 108
- MINUTE, 132
- MOD, 38
- MONTH, 120
- MROUND, 140
- NOT, 136
- NOW, 132
- OFFSET, 178
- OR, 136
- PMT, 110, 206
- PV, 112
- RIGHT, 144
- ROUND, 408
- ROUNDUP, 322
- ROW, 38
- SECOND, 132
- SUBTOTAL, 47
- SUM, 108
- SUM, DAX function, 508, 512, 514
- SUMIF, 116
- SUMPRODUCT, 217
- SWITCH, 150
- TABLE, 207
- TEXT, 142
- TEXTJOIN, 142
- TIME, 134
- TODAY, 90, 120
- TRIM, 147
- VLOOKUP, 148, 154
- YEAR, 120

- future value, explained, 111, 112
- FV function, 112

## G

- gant chart, 124
- get & transform
  - aggregated data query, advantages of over pivot table, 424
  - aggregated data query, creating, 424
  - append query, creating, 430
  - arguments, changing for steps, 412
  - big data, working with, 400
  - calculated column, adding, 422
  - column, creating duplicate of, 418
  - column, moving, removing, renaming, filtering and sorting, 404

- column, replacing values in, 406
- combining tables, de-normalizing by, 442
- connection only query, creating, 460
- connections, automatically refreshing, 402
- connections, explained, 402
- custom column, adding, 422
- data model, connecting query return values directly to, 400
- data type, conversion of, 408
- data types, defined, 408
- data types, in-depth explanation of, 408
- date column, transforming, 418
- date type, setting for a column, 410
- Date.To.Text, PQFL function, 422
- delimited data, splitting, 406
- de-normalized data, in-depth explanation of, 442
- derived values, de-normalizing by adding, 442
- duplicate column, creating, 418
- ELT, advantages of ETL over, 398
- empty string, comparison with null value, 416
- error rows, removing, 414
- ETL (extract, transform and load), overview, 398
- ETL, advantages of, over traditional ELT, 398
- expanding joined tables, 446
- extract, process explained, 398
- filtering columns, 404
- first row, using as column headers, 414
- formulas, PQFL, inspecting and editing, 412
- get external data, advantages over, 400
- group by dialog, 424
- headers, using first row as, 414
- import data dialog, 460
- join, explanation of different types, 444
- load to, dialog options, 400
- load, process explained, 398
- M language, synonym for PQFL, 412
- merged query, creating, 444, 446
- moving column, 404
- multiple queries, working with, 428
- normal data, 442
- null values, comparison to empty strings, 416
- null values, in-depth explanation, 416
- number column, transforming, 420
- number scale, changing, 420
- only create connection, query type, 400, 402, 428
- overview, 398
- power pivot, adding tables to using, 460
- PQFL described, 412

- PQFL formulas, inspecting, 412
- PQFL, blank spaces, using in formulas, 430
- PQFL, Date.To.Text function, 422
- queries and connections task pane, 460
- query tools, new ribbon tab for linked tables, 400
- query, connection only, creating, 460
- query, creating, 400
- refresh connection automatically at timed interval, 402
- refresh, linked table connected to, 400
- removing columns, 404
- removing rows, 414
- renaming columns, 404
- renaming queries, 402
- replacing values in columns, 406
- rounding values, 420
- rows, removing, 414
- sorting columns, 404
- spaces, using in PQFL formulas, 430
- splitting delimited data, 406
- steps explained, 412
- steps, arguments, setting in, 412
- steps, deleting, 412
- time column, transforming, 418
- transform date columns, 418
- transform number columns, 420
- transform time columns, 418
- transform, process explained, 398
- unpivot aggregated data, 426
- web query, creating, 400
- get external data. *See also* get & transform made redundant by get & transform, 400
- goal seek, 214
- goto special, 77
- gross profit and markup explained, 138
- group
  - pivot table date fields, 342
  - pivot table fields, 308
  - pivot table text fields, 340
  - pivot table value ranges, 344
- group box (form control), 260

## H

- heirarchy
  - data model, defining in, 486
- help system
  - formula AutoComplete, accessing from within, 108
- hide worksheets, columns and rows, 218
- HLOOKUP function, 154

HOLAP, 474  
HOUR function, 132  
hyperlinks. *See* internet

## I

IF function, 114  
    avoiding nesting using VLOOKUP, 115  
IFERROR function, 152  
IFS function, 160  
INDEX function, 151, 158  
    combining with MATCH, 151, 158  
INDIRECT function, 176  
input message, 88  
input range (of combo box form control), 263  
INT function, 38  
IntelliSense, 108  
interest, calculating using PMT function, 110  
internet  
    address, adding to the quick access toolbar, 246  
    back button, adding to the quick access toolbar, 246  
    hyperlink to a shape, 290  
    hyperlink, adding a screen tip to, 242  
    hyperlink, inserting, 242  
    hyperlink, to a range name, 243  
    hyperlink, to an e-mail address, 246  
    hyperlink, to other workbooks, 244  
    hyperlink, to web pages, 244  
    navigation controls, adding to the quick access toolbar, 246  
    next button, adding to the quick access toolbar, 246  
    web query, creating with get & transform tool, 400  
invisible signature, adding, 232

## J

join, types of, 444

## K

key performance indicator, 518  
    base value, 518  
    status threshold, 518  
    target value, 518  
keyboard shortcuts  
    Create names from selection, 168  
    defined names, list, 171  
    format cells dialog, open, 128  
    function arguments dialog, display, 126  
    general format, 128

    name manager, show, 174  
KPI. *See* key performance indicator

## L

latitude. *See* 3D map  
LEFT function, 144  
LEN function, 146  
license. *See also* update channels  
    Excel 365, 26  
    perpetual and subscription, differences, 26  
    subscription, 26  
linked table. *See* table  
load. *See* get & transform  
locale  
    used to write this book, 19  
logical expressions using AND, OR and NOT, 136  
longitude. *See* 3D map

## M

M language. *See* get & transform  
macro-enabled workbook format, 282  
macros  
    absolute references, recording with, 280  
    automatically running when workbook is opened, 293  
    naming, 280  
    personal macro workbook, storing macro in, 280  
    quick access toolbar, running from, 292  
    recording with absolute references, 280  
    recording with relative references, 288  
    security, explained, 282  
    settings, security, 284  
    shapes, running from, 290  
    shortcut key, defining, 281  
    store macros in, explained, 280  
    this workbook, storing macro in, 280  
    trusted document, making a macro-enabled workbook into, 282, 286  
    trusted folder, creating, 285  
    VBA, relationship between, 278  
manage relationships dialog, 464  
manual calculation, 138  
many-to-many relationship  
    described, 472  
    power pivot, incompatibility with, 472  
markup and gross profit explained, 138  
MATCH function, 151, 156  
    combining with INDEX, 151, 158  
    match type argument, explained, 151, 156

- using to make VLOOKUP function more resilient, 148
- MAX function, 108
- MDX. *See also* data model
  - query language explained, 490, 493
- measure. *See* power pivot
- memory
  - 64 bit excel version, better use of, 366, 440, 456
  - checking how much is available, 456
  - out of memory errors, 366, 440, 456
- merge across command, 177
- merge cells, 177
- MID function, 144
- midnight, dealing with in time calculations, 130
- MIN function, 108
- MINUTE function, 132
- MOD function, 38
- modeling. *See* data modeling
- modern data analysis
  - defined, 470
- MOLAP, 474
- MONTH function, 120
- MROUND function, 140
- munging data. *See* get & transform

## N

- name box, 169
  - resizing, 173
- name manager, 174, 176
- named constants, 170
- named ranges. *See* range names
- names. *See* range names
- normal data. *See* get & transform
- NOT function, 136
- NOW function, 132
- null values, 416
- numbers
  - formatting, in pivot table, 307

## O

- objects
  - chart, embedding into word, 250
  - copying, 251
  - drag and drop, creating by, 253
  - linking to files, 252
  - OLE (object linking and embedding), 251
  - paste special, creating by, 253
  - worksheet, embedding into word, 248
  - worksheet, linking to word, 252
- office theme, changing, 28

- office version
  - checking Excel version, 27
  - version number and build number explained, 26
- OFFSET function, 178
- OLAP. *See also* data model; OLAP pivot table;
  - power pivot
    - accessing data model values using the CUBEMEMBER function, 494
    - data model, accessing data directly with the CUBEVALUE function, 492
    - MDX, query language, described, 490, 493
    - MOLAP, ROLAP and HOLAP, differences between, 474
    - rules, Codd's for OLAP, 468
  - OLAP cube. *See* data model
  - OLAP pivot table. *See also* data model; OLAP;
    - power pivot
      - big data, ability to work with, 468
      - calculated field, workaround, 490
      - calculated item, workaround, 490
      - creating from data model, 466
      - CUBEMEMBER, function, using to retrieve data from OLAP cube, 494
      - CUBEVALUE, function, using to retrieve data from data model, 492
      - data model, creating from, 466
      - differences compared to regular pivot table, 468
      - distinct count aggregation method, 516
      - drill-down, limitations in, 490
      - drill-down, setting maximum number of records to retrieve, 490
      - GETPIVOTDATA, function, using to retrieve data from, 350, 493
      - limitations of, 490
      - named sets, 496
      - OLAP data model, relationship to, 468
      - overview, 468
- OLE (object linking and embedding), 251
- one-to-many relationship
  - creating using manage relationships dialog, 464
  - creating using power pivot, 464
  - described, 472
- operators
  - intersection, 176
- option button (form control), 260
- OR function, 136
- organizing
  - sample files folder, 30
- outlines

collapsing and expanding, 77

## P

page fields, 316

password

open workbook, setting, 222

secure, creating with secure password generator, 297

paste special

objects, creating with, 253

validation, 183

personal macro workbook, storing macros in, 280

pivot chart

creating from pivot table, 352

moving to its own worksheet, 352, 353

pivot table. *See also* OLAP pivot table; pivot

charts; slicers

activating, 307

big data, using to analyze, 440

cache. *See* data cache

calculated field, adding to, 336

calculated item, adding to, 338

clear filters command, 324

collapse and expand outline in, 309

column labels, 311

compact form layout, 330

creating from a table, 306

custom PivotTable styles, creating, 328

data cache, linked table, connected to, 438

data cache, refreshing from, 438

date fields, grouping by, 342

differences compared to OLAP pivot table, 468

drilling down into, 307

field header, showing and hiding, 337

field list, 307, 310

field, removing from, 310

filter, 314

filters, removing all from, 324

formatting numbers in, 307

formatting using PivotTable styles, 326

frequency distribution, 344

GETPIVOTDATA function, using to retrieve

data from, 350

grand total, adding to, 335

grouping fields in, 308

linked table, as data source for, 438

multiple in one worksheet, embedding, 354

multiple summations, displaying in, 334

multiple worksheets, generating using report filters, 324

multiple, filtering with slicers, 356

named ranges, creating from, 306

numeric ranges, grouping by, 344

outline form layout, 331

percentage, show row data by, 346

refresh data in, 438

report filter fields, using, 316

report layouts, 330

row labels, 310

rows, hiding, 337

slicers, filtering with, 318

sort, 314

subtotals, adding and removing, 332

tabular form layout, 331

text fields, grouping by, 340

values, 310

PMT function, 110

power map. *See* 3D map

power pivot. *See also* data modelling; KPI; power

pivot rules

64 bit version of Excel vs 32 bit, advantages of, 456

add-in, installing, 458

ALL, DAX function, 524

CALCULATE, DAX function, 520

calculated area, enabling and disabling, 504

calculated column, adding, 506

calculated column, described, 504

calculated field, older name for calculated measure, 508

calculated measure dialog, 514

calculated measure, adding, 508, 514

calculated measure, described, 504

calendar table, adding to data model, 486

column, calculated, adding, 506

column, calculated, described, 504

column, renaming, 506

context, comparison of row and filter, 512

crash, recovering from, 458

data view, displaying, 506

diagram view, displaying, 464

DISTINCTCOUNT, DAX function, 516

evaluation context, 512

explicit vs implicit measures, 510

filter context, explained, 512

formatting values in, 488, 506

heirarchy defining in data model, 486

implicit vs explicit measures, 510

installing, 458

many-to-many relationship, incompatibility with, 472

measure, adding, 508, 514

- measure, described, 504
- memory issues when using, 364, 456
- OLAP pivot table, creating from, 466
- OLAP, MOLAP, HOLAP and ROLAP, differences between, 474
- pasting data into a new table with, 462
- relationship, creating with, 464
- relationships, automatic creation of, 466
- repairing, when tab disappears, 458
- row context, explained, 512
- SSAS, advantages of hosting data model on, 456
- SUM, DAX function, 508, 512, 514
- tab, restoring if it disappears, 458
- tables, adding to via get & transform, 460
- window, differences compared with Excel, 462
- window, opening, 458
- window, overview, 462, 504
- xVelocity engine, advantages of, 510
- year-on-year growth, calculating, 522
- power pivot rules
  - data modeling, 534
  - DAX measures, creation of, 537
  - get & transform, 532
  - naming convention for tables, columns and measures, 535
- power query. *See* get & transform
- Power View
  - retired product, now part of Power BI, 364
- PQFL. *See also* get & transform
  - Date.To.Text function, 422
- precedence rules in formulas, 106
- precedents, tracing, 194
- pre-processing data. *See* get & transform
- present value, explained, 112
- primary key. *See also* data model
  - explained, 432
  - meaningless, importance of, 432
  - naming convention, 432
  - unique, necessity to be, 432
- profit, difference between markup and gross profit, 138
- project management, Excel's suitability for, 124
- protected view, 31
  - potential problems with when downloading sample files, 30
- PV function, 112

## Q

- query. *See also* get & transform
  - deleting, 482

- quick analysis, 42
  - converting a range to a table using, 46
  - percentages, adding using, 44
  - running totals, adding using, 44
  - totals, adding using, 42
- quotations
  - Abraham Maslow, 305
  - Alexander McCall Smith, 363
  - Benjamin Disraeli, 25
  - Carly Fiorina, 397
  - Confucius, 5, 205
  - George Bernard Shaw, 71
  - George Orwell, 105
  - Gordon B. Hinckley, 503
  - Kathryn Minshew, 241
  - Plutarch, 167
  - Sir Arthur C. Clarke, 455
  - Winston Churchill, 4

## R

- range names
  - apply names command, 173
  - automatically creating, 168
  - automatically creating in two dimensions, 174
  - creating from selection command, 174
  - creating manually, 170
  - dynamic, creating using OFFSET function, 178
  - dynamic, uses of, 178
  - explained, 168
  - formulas, make more readable with, 172
  - formulas, using in, 169
  - hyperlinks, creating to point to, 243
  - INDIRECT function, 176
  - intersection operator, using with, 176
  - name manager, 174, 176
  - named constants, 170
  - pasting into formulas using the paste name dialog, 181
  - pivot table, creating from, 306
  - qualified and unqualified references to, 170
  - scope, workbook and worksheet, 170
  - syntax rules for, 169
  - table based, creating, 180
  - validations, using with, 182
  - viewing, 172
- ranges. *See also* range names
  - AutoFilter, applying to, 30
  - consolidating, 80
  - duplicate entries, removing from, 96
  - sorting by column, 54
  - sorting by row, 52

- subtotals, create automatically, 76
- table, converting into, 46
- table, creating from, 48
- unique constraint, adding to, 98
- read only worksheet
  - creating, 227
  - hiding to prevent viewing of, 227
- regional settings, 128
- relational database
  - data model, creating from, 474
  - described, 432
  - OLTP database design explained, 476
  - star schema, creating from, 478
  - view, using in, 436
- relationship
  - creating using manage relationships dialog, 464
  - creating using power pivot, 464
  - creating using VLOOKUP function, 434
  - explained, 432
  - importing, from a relational database, 474
  - manage relationships dialog, 464
  - many-to-many link table naming convention, 472
  - many-to-many, explained, 472
  - one-to-many, explained, 472
- ribbon
  - custom groups, adding to, 296
  - customizations, saving to a file, 299
  - tabs, showing and hiding, 294
- RIGHT function, 144
- ROLAP, 474
- ROUND function, 408
- ROUNDUP function, 322
- row context. *See* power pivot
- ROW function, 38
- rules. *See* power pivot rules

## S

- sample files
  - downloading, 19, 30
  - organizing folder, 30
- scenario summary report, creating, 212
- scenarios
  - defining, 210
  - goal seek, 214
  - merging, 212
  - quick access toolbar, viewing from, 211
  - scenario manager, 211
  - scenario summary report, creating, 212
- scheduling equation, 124
- schema, 446
  - snowflake schema, 478
  - star schema, 478
- screen tip, adding to a hyperlink, 242
- screenshot (sidebar), 227
- scrubbing data. *See* get & transform
- SECOND function, 132
- security
  - custom views, creating and viewing, 220
  - digital certificate, implementing macro security with, 284
  - digital certificates, 230
  - digital signature, adding invisible, 232
  - hide worksheets, columns and rows, 218
  - locking cells to prevent users changing them, 226, 277
  - macro, 282
  - multiple levels for one worksheet, 228
  - password to open, setting, 222
  - passwords, choosing secure, 222
  - read only worksheet, creating, 227
  - structure and windows, protecting with a password, 224
  - trust center, 284
  - trusted document, creating, 286
  - trusted folder, creating, 285
  - unhide worksheets, columns and rows, 218
  - visible signature, adding, 234
- self-service BI. *See also* 3D Map, Power Pivot, Get & Transform
  - comparison with earlier OLAP implementation methods, 468
  - suite explained, 364
- semi-annual Excel updates, 1
- shapes, running macros from, 290
- shaping data. *See* get & transform
- shortcut keys
  - recalculate workbook, 133
  - time, entering a non volatile current time, 133
- signature, digital, 232
- slicers, 318
  - columns, changing number of, 319
  - connect multiple pivot tables to, 356
  - date-driven interface, creating with, 322
  - filtering multiple pivot tables with, 356
  - filtering pivot table with, 318
  - formatting, 319
  - ranges, filtering with, 46
  - re-sizing, 319
  - style, changing, 319
  - timeline, 320
- smart tag

- using to correct errors, 189
- snowflake schema, 478
- solver, 216
- sort
  - by cell color, 52
  - by conditional formatting icon, 52
  - by font color, 52
  - custom list, by, 56
  - left to right, 55
  - multiple criteria, using in, 52
  - options, 55
  - pivot table, 314
  - range by column, 54
  - range or table by row, 52
- sounds
  - enabling audio cues, 28
- speak cells, 198
- special items. *See* structured references
- split text using Text to Columns, 73
- sql
  - described, 436
- SQL Server. *See also* SSAS
- sql server analysis services. *See* SSAS
- SSAS
  - described, 456
  - OLAP data model hosting, advantages of, 456
  - solving memory issues by hosting data model on, 456
  - version history, 456
- star schema, 478
- status threshold
  - in kpi, 518
- strings
  - CONCATENATE function, 142
  - concatenating using & operator, 140
  - custom format codes, 142
  - FIND function, 146
  - LEFT function, 144
  - LEN function, 146
  - MID function, 144
  - numerical, converting to, 145
  - RIGHT function, 144
  - TEXT function, 142
  - TEXTJOIN function, 142
  - TRIM function, 147
- structure, protecting with a password, 224
- structured query language. *See* sql
- structured references. *See also* tables
  - enabling and disabling, 58
  - special items, using in, 62
  - unqualified and qualified, explained, 64

- styles
  - pivot table, creating custom style in, 328
  - pivot table, using in, 326
  - table, 48
- SUBTOTAL function, 47
- subtotals. *See also* ranges, tables
  - copy subtotals only, 77
  - grand total, adding to pivot table, 335
  - nested, creating, 77, 78
  - pivot table, adding to, 332
  - tables, generate from using data consolidation, 82
- SUM function, 108
- SUM, DAX function, 512
- SUMIF function, 116
- SUMPRODUCT function, 217
- SWITCH function, 150

## T

- table. *See also* structured references
  - calculated columns in, explained, 64
  - creating a pivot table from, 306
  - custom style, creating, 50
  - data source, linking to, 438
  - dimension table, explained, 478
  - duplicate entries, removing, 96
  - fact table, explained, 478
  - formatting, 48
  - get & transform query, linking to, 400
  - linked, detailed explanation of, 438
  - linked, refreshing, 400, 438
  - linked, refreshing, automatically at timed interval, 402
  - linked, unlinking, 438
  - linking to get & transform query, 400
  - naming, 59, 181
  - new rows and columns, enabling and disabling
    - automatic inclusion in, 59
  - power pivot, adding to, 460
  - range names, associating with, 181
  - range, converting to, 46, 48
  - slicers, using with, 46
  - sorting by row, 52
  - structured reference, creating manually, 60
  - structured reference, explained, 58
  - structured reference, using, 58
  - style options, 48
  - style, custom, creating, 50
  - styles gallery, 48
  - total row, adding to, 47
  - total row, showing average values in, 47

- unique constraint, implementing, 98
- unlinking, 438
- target value
  - in kpi, 518
- temperature gauge chart, 272
- TEXT function, 142
- text to columns, 72, 74
- TEXTJOIN function, 142
- the smart method
  - learning by participation, 5
  - two facing pages rule, 4
- themes. *See also* office theme
  - applying to a workbook, 48
  - restricting color choice to, rationale for, 50
- third normal form, 72, 442
- TIME function, 134
- timeline. *See* slicers
- times. *See* dates and times
- TODAY function, 90, 120
- totals
  - adding using quick analysis, 42
- trace dependents tool, 194
- trace error tool, 193
- trace precedents of formulas, 192
- transform. *See* get & transform
- TRIM function, 147
- trust center, 284
- trusted document, 282, 286
  - list, clearing, 287
- trusted folder, creating, 285

## U

- unhide worksheets, columns and rows, 218
- unique
  - constraint, adding to ranges and tables, 98
  - records, extracting using advanced filter, 40
- unlink table. *See* table
- unpivot. *See* get & transform
- update channels
  - automatic updates, enabling, 26
  - explained, 26
- updates. *See* update channels

## V

- validation
  - custom, 94
  - date, 90
  - dynamically changing based on a cell value, 182
  - error alert messages, 86

- formula driven, 90, 183
- input message, 88
- link together using range names, 182
- list, 92, 183
- mandatory and advisory, 87
- numeric data, 84
- removing from selected cells, 183
- source, different ways of defining, 92
- style, 87
- text length, 90
- VBA, 278
- view
  - in relational database, explained, 436
- visible signature, adding, 234
- visualizations, 53
- VLOOKUP function, 148, 154
  - exact lookup, using for, 148
  - inexact lookup, using for, 154
  - relationship, creating using, 434

## W

- watch window, 196
- web. *See* internet
- what-if analysis. *See also* data tables, scenarios
  - data table, single-input, creating, 206
  - data table, two-input, creating, 208
  - goal seek, 214
  - scenario manager, 211
  - scenario summary report, creating, 212
  - scenarios, defining, 210
  - scenarios, merging, 212
  - solver, using, 216
- wildcards
  - use of in filter criteria, 35
  - use of in logical criteria, 117
- word
  - embedding a chart object into, 250
  - embedding a worksheet object into, 248
  - linking an Excel worksheet to, 252
- word documents, hyperlink to, 245
- workbooks
  - macros, running automatically when opened, 293
  - recalculating, 133
- working days
  - calculating using DAX DISTINCTCOUNT function, 516
- wrangling data. *See* get & transform

**X**

xVelocity engine, 470, 510

**Y**

Y2K bug, 189

YEAR function, 120

year-on-year growth

calculating using power pivot, 522