NORTH DAKOTA UNIVERSITY SYSTEM
CORE TECHNOLOGY SERVICES

POWER WHAT?
HANDS ON SESSION WITH EXCEL POWER QUERY

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Presenter

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Overview

• Excel Power Query (Brief overview)
  • What is it?
  • Why would you use it?
  • How to combine data from multiple sources
Why use Power Query?

- Store millions of rows of data
- Powerful transformation tools
- Update with click of one button
- User friendly
- No additional software to buy, install, or maintain
What is Excel Power Query?

• Power Query is a feature within Excel
  • Under the Data tab

• Used to combine data for data analysis
• Main Queries and Reports to Use
  • NDU_FA_0308 – FA Comprehensive Data Query
  • NDU_FA_0129 – Fund Roster Query #1
  • NDU_FA_0129_1 – Fund Roster without SSN
  • NDU_FA_0092 – Item Type Totals List
  • Census Enrollment Activity Report
  • FA Enrolled Students Report
  • Federal Work Study Earnings
  • Student Indebtedness Report
  • Many, many, more in SFA Reports and Queries
document on the training site
Getting Started - Data

• Reminders and Hints
  • Get the right population
  • Create data carefully
  • Results make sense
Hands On - Get Data

- Run Query and Save as CSV
  - NDU_FA_0129_1 – Fund Roster Without SSN
  - Click HTML link
  - Use your institution and term 2310
  - View Results
  - Click CSV Text File and save the file
  - File Name – 2310 Fund Roster
Hands On - Get Data

• Run Report and Save as CSV
  • Enrolled Students Report for Financial Aid
    • NDU Applications > NDU Financial Aid > Report > NDU FA Enrolled Students
  • Run Control
    • Your institution
    • Term – 2310
    • Aid Year – 2023
    • Email Usage – E-MAILCAMP
    • Tuition Budget Category – TUIT
  • Save FA_Enrolled.CSV
Import Data

- Load Data
  - Excel Workbook
  - Text/CSV
  - Table/Range
  - SharePoint
Hands On - Import Data

- New Excel File
- Data Tab
  - Get Data
  - From File
  - From Text/CSV
- Select File & Import
  - 2310 Fund Roster
Transform Data

- Remove Columns
- Remove Rows (blanks, duplicates)
- Sort
- Split Column
- Change Case
- Append Data
- Merge Data
- Group
- Aggregate
Transform Data

- Tracks Changes
- Easy Split and Group options
- Change Name
Load Data

- To Table
- Connection Only
  - Doesn’t add data to the file in a sheet
- To the Data Model
  - Data gets added to a sheet in the file
Hands On - Transform Data

- Transform Data
- Change ID & Item Type to Text
  - Replace Current
- Close & Load
Hands On - Import Data

- Data Tab
  - Get Data
  - From File
  - From Text/CSV
- Select File & Import
  - FA_Enrolled
Hands On - Transform Data

- Transform Data
- Change ID to Text
  - Replace Current
- Close & Load
Combine Data

- **Merge Data**
  - Add data to the existing rows
- **Append Data**
  - Add more rows to the existing data set
Hands On - Combine Data

- Click Get Data > Combine Queries > Merge
Hands On - Combine Data

- Select data
  - 2310 Fund Roster
  - FA_Enrolled
- Click on column(s) to match
  - ID
- Review selection matches
- Click OK
Hands On - Combine Data

- Expand Columns
  - Select the columns to merge – Enrolled Units and SAP Status
  - Uncheck Use original column name as prefix
  - Click OK
- Filter SAP Status
  - Not Meet or Null
- Rename Merge
  - 2310 SAP DQ with Award
- Close & Load
Other Use Cases

• Enrolled Student Group by Program with Awards
• State Grant or State Scholarship Reconciliation
• Possible new scholarships or waiver
• Other ideas?
Hands On – Exercise Handout

- Scenario 1
- Scenario 2
- Scenario 3
- Scenario 4
QUESTIONS?