



Modelling with Microsoft 365 & Dynamic Arrays

The modern angle in Dashboard and Data Visualisation



20 Hours Virtual Learning Experience

19th - 23th August 2024

12:00 - 16:00 Jamaica Standard Time

www.biiworld.com

COURSE OVERVIEW:

Discover how to “tame” your data and make it work for you! Learn to synthesise and summarise information into a logical framework. Gain key concepts in reporting and data visualisation best practice for presenting data graphically using tables, charts, reports and presentations.

Prerequisites

The course material includes extensive use of Excel and participants will gain the maximum benefit from this course if they are already competent spreadsheet users. It is designed for users who do use Excel on a regular basis and are comfortable with using its tools and functions.

At minimum, it is assumed that participants will know how to:

- Navigate confidently in Excel
- Create and use advanced Excel tools and functions

Prior knowledge of Power Pivot, Power Query or Power BI is not required

Methodology

Many of us struggle to make sense of all the data that is available in this information age. With such a deluge of reports and statistics which don't mean anything or can't be made sense of, it's no wonder that data is often misinterpreted or not communicated at all. This course will help you understand how to “tame” your data and make it work for you! Learn how to synthesise information into a logical framework, summarise it into a meaningful format, and then display the summary into easy-to-read tables and graphs. Covering dashboard reporting, balanced scorecards, visual design of charts and tables, we will also discuss the new charting and analysis features of Excel 365 and Power BI.

Understanding how Modern Excel tools can help analyse data and create dashboards to communicate your message is a critical skill for Excel users today.

What is Modern Excel?

Any version of Excel released from Excel 2010 onward is referred to as “Modern Excel” because it introduced new tools such as **Power Pivot**, **Power Query** and **Power BI**. The introduction of these tools was the most exciting thing to happen in the Excel world since the PivotTable!

LEARNING OBJECTIVES:

During the course, participants will hone their advanced modelling skills and experience designing solutions to real-world examples.

Participants will:

- Understand the principles of data analysis
- Learn to synthesise and summarise information into a logical framework.
- Know how to use visual effects to improve their reports and presentations
- Explore how to summarise, present and communicate data clearly and concisely
- Consider the principles of good dashboard design and presenting data graphically
- Evaluate the new Modern Excel tools available for data analysis and dashboards
- Discover the tools to analyse data & build reports using your existing Excel tools and skills (and perhaps a few you didn't know you had!)

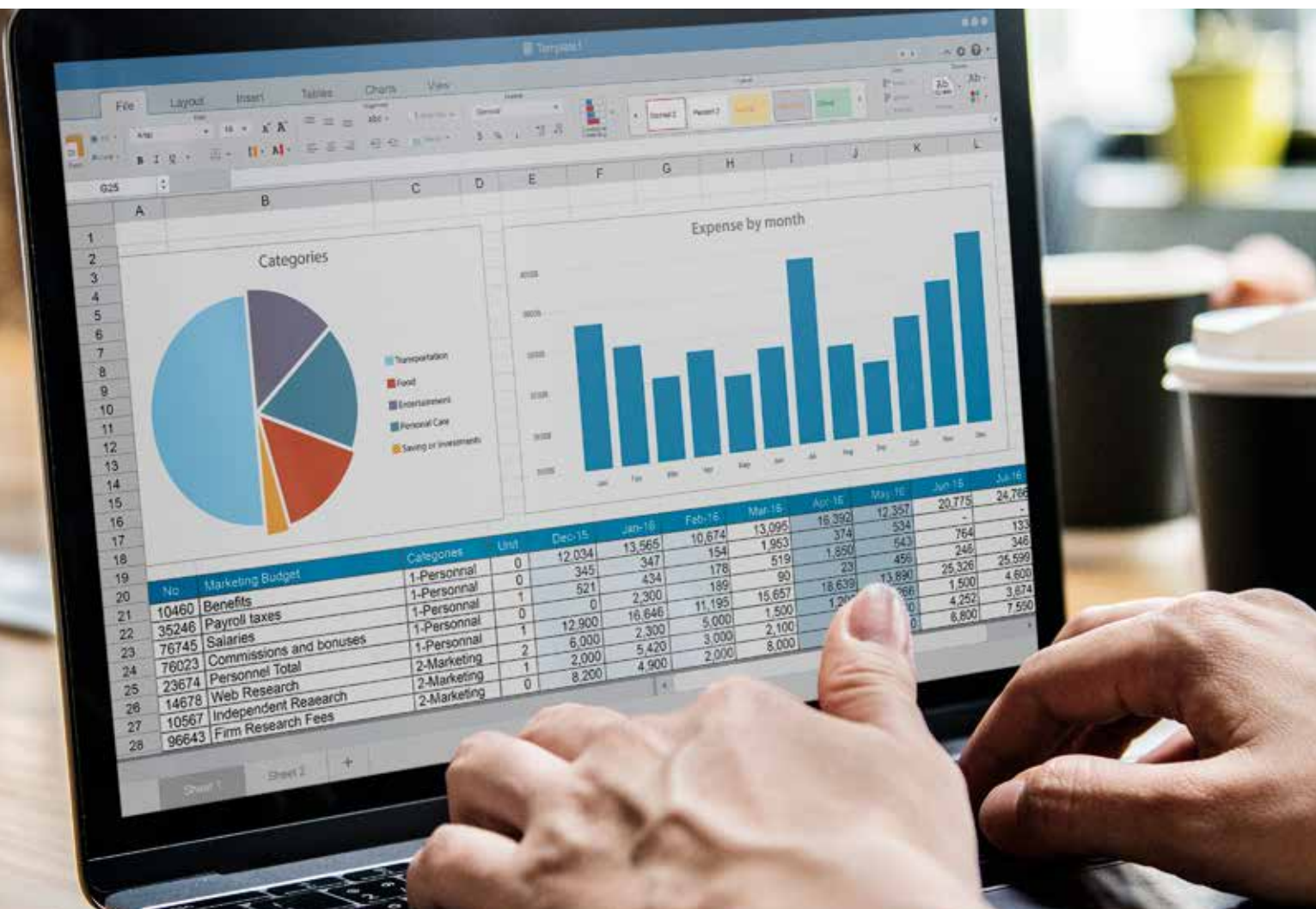


AUDIENCE (Who should attend):

This course is aimed at managers and other professionals who need to create dashboards and other reports in order to analyse interpret and present information. It is expected that participants should have had some exposure to business, finance and reporting principles. This course builds on students' existing knowledge of Excel tools and functions and incorporates these into complex and dynamic reports and dashboards.

Title/Department:

- Financial modellers and analysts
- Business professionals who are eager to improve their Excel and Financial Modeling skills
- Finance & Accounting students





Instructor:

Danielle Stein Fairhurst

... your EXPERT TRAINER for this Course.

Danielle Stein Fairhurst with over 20 years' experience as a financial analyst, she helps her clients create meaningful financial models in the form of business cases, pricing models and management reports. She has hands-on experience in several industry sectors, including telecoms, information systems, manufacturing & financial services.

Danielle has regular engagements around Australia and globally as a speaker, course facilitator, financial modelling consultant and analyst. In 2021 she was awarded the prestigious Microsoft Most Valuable Professional (MVP) award and regularly commentates "Excel as Esports" battles for the Financial Modeling World Cup (FMWC) on ESPN3. She is on the judging panel for the 2021 Financial Modelling Innovation Awards and is on the Diversity Council for the ModelOff Financial Modeling World Championships

Specialisations:

- Financial modelling, Budgeting & Forecasting
- Data Analysis, Business Cases & Pricing Models
- Management Reporting & Dashboards



PRESENTATIONS:

Day 1:

Day 1: Using Modern Excel for Data Analysis

12:00 - Pre-Course Intro

Module 1 :

Tool selection

- Evaluation of Excel vs. other BI alternatives, including Power Pivot in terms of speed, usability and cost
- How Microsoft competes in the BI, data analysis and dashboard space

Using Excel for Big Data

- Learn how Excel fits into the world of big data
- Awareness of software capabilities
- Looking forward to the future of Excel

Break

Module 2 :

What's new in Excel 2019 / 365

- Technical differences between versions
- Considerations when building data models for users of different versions

Shortcuts

- Speed up your data manipulation in Excel with the use of shortcuts
- Becoming an Excel master user without touching the mouse!

Break

Module 3 :

Structured Reference Tables

- Structural referencing versus cell referencing
- Advantages of tables
- Analysing data more quickly and efficiently using structured reference table

PivotTables for Analysis

- How to summarise using PivotTables
- Hierarchies and grouping
- Time intelligence
- Slicers and timelines for interactivity in Dashboards

At each step during the course, participants build and practice each formula, tool and technique and will build their own dashboards to take away for future use.

Post-Session Q &A

14:00 – End of Day1



PRESENTATIONS:

Day 2:

Day 2: Advanced Modelling Tools

12:00 – Review of Day 1

Module 4

Essential Excel tools & functions

- Overview of must-know standard Excel tools and functions for data analysis
- Extracting insights from data using various tools and functions

Creating a robust formula

- Nest functions together to create succinct and robust formulas
- When and when not to nest functions
- Understanding and auditing complex nested functions

Break

Module 5

Dynamic Arrays as a Modelling Tool

- The most useful array functions for modelling

- Selecting the right function (arrays vs. traditional formulas)
- Nesting functions with arrays

Break

Module 6

Modelling Best Practice and Design

- Principles of financial modelling best practice
- Designing a layout to incorporate spill ranges
- Dangers of working with array functions

sPost-Session Q &A

16:00 – End of Day2

Day 3:

Day 3: Power Excel Tools

12:00 – Review of Day 2

Module 7

Power Excel Tools

- Introduction to Power Pivot, Power Query and Power BI.

- Evaluation of Excel vs. other BI alternatives in terms of speed, usability and cost
- Looking forward to the future of Excel

Break



PRESENTATIONS:

Day 3:

Module 8

Get and Transform your data

- Extracting and cleansing data with Power Query
- Introduction to the M language
- Gathering data with connections

Break

Module 9

Which chart?

- Choosing the correct chart to use to display different data
- How to quickly display messages from your findings

- Tell a story with your charts

Selecting the correct chart to display data

- Getting your message across most effectively by choosing the correct medium of display
- Using actual data, create a dashboard to tell your story most as effectively as possible

At each step during the course, participants build and practice each formula, tool and technique and will build their own dashboards to take away for future use.

Post-Session Q &A

16:00 – End of Day 3

Day 4:

Day 4: Dashboards and Data Visualisation

12:00 – Review of Day 3

Module 10

Purpose and benefits of Dashboards

- History and definition of dashboard reports
- Why dashboards are so popular
- Common mistakes when building a Dashboard
- Critique of poorly built dashboards
- Rules for dashboard design

Break

Module 11

Visual Design

- Design principles for effective graphic data presentation
- Dos and don'ts for visual design
- Dashboards versus infographics

Principles of dashboard design best practice

- Dashboard layout, colour choice and display principles
- The Z reading pattern
- Data to ink ratio

Break



PRESENTATIONS:

Day 4:

Adding icons and images to dashboards

- Quick and easy ways to add automated colour and icons to your reports
- Tips and tricks for adding images
- When NOT to use icons and images
- Effective use of colour and logos

At each step during the course, participants build and practice each formula, tool and technique and will build their own dashboards to take away for future use.

Post-Session Q &A

16:00 – End of Day4

Day 5:

Day 5 – Visualisation with Power BI

12:00 – Review of Day 4

Module 13

Dashboarding with Power BI

- Creating visuals in Power BI Desktop
- Getting new data and refreshing the dashboard
- Publishing a report to the cloud service

Break

Module 14

Creating a Model Dashboard in Power BI – Part 1

- Using provided data, create your own dashboard in Power BI based on a financial model

Break

Module 15

Creating a Model Dashboard in Power BI – Part 2

- Using provided data, create your own dashboard in Power BI based on a financial model

At each step during the course, participants build and practice each formula, tool and technique and will build their own dashboards to take away for future use.

Post-Session Q &A (Day 1 – 5)

14:00 – End of Day5 & Course

" This training utilises the latest features of Modern Excel and Power BI available in Excel for Microsoft 365 or 2021, so it is essential that you have the latest versions of this software installed prior to the training. "



Does BII Online Virtual Training have the same value as traditional classroom training?

Yes, BII Online Virtual Training offers participants; same training system as in-person, i.e face-to-face engagement with instructors, course material, interactive participation of all delegates, and personal support that they would expect to find in a traditional classroom.

What are main features of your online courses? Are they on-demand? Is it different content from the in-person offering?

The content of the virtual training is similar to the in-person sessions and customized presentation makes it a richer online learning experience. As always, we will share presentation materials with attendees for later reference.

The online courses are not on-demand and recordings cannot be purchased. They are set on scheduled dates, live with an instructor and co-host via webinar software. While the day is shorter than an in-person session (4hrs vs 8hrs), timing are adjusted to accommodate attendees in different time zones and allow more time for one-on-one conversations via the Q & A.

What are the technical requirements for participation in a virtual course?

All you need to participate in virtual training are:

- Desktop or Laptop or Tablet Computer, and Internet connection
- Webcam
- Headset with built-in microphone

Can I attend an online training session if I have a Macintosh computer?

Yes, Our Online training systems does allow Macintosh computers, PCs, and computers running Linux to easily enter any of our online training sessions.

What type and version of browser will I need for online classes?

It is recommended that you use the latest version of Firefox, Chrome or Internet Explorer for Windows and Firefox or Safari for Mac. Each of these is available for free download and also suggested you have the PDF Reader

How do I have access to the trainer for questions?

As in the classroom, you will see the trainer in front of you and have the opportunity to ask questions at any time - all via audio and video transmission.

Is there a mute option within an online training session to minimize background noise from my audio connection?

Yes, the Mute button will display to the right of your name as you hover your mouse over your name shown in the Participants panel on the top, right side of the Web conferencing screen.

What if I miss few sessions of the online training program?

The training will be simultaneously recorded which will be provided to you as per request & requirement

Do I get a Certificate at the end?

Yes, you will get a PDF version of your certificate of completion



