

# EXCEL AND POWER BI TRAININGS

## Course Outlines



Lifetime access



Online support



Certifications



Quality  
documentation



Easy group  
management



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LE CFO  
MASQUÉ

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# POWER BI (LEVEL 1)

## Summary

This beginner Power BI training course is for the professionals who have a lot of data to analyze and who are looking for a self-service BI solution (Business Intelligence). More specifically, it is for the professionals who must, without needing the help of the IT department:

- Import data from different sources
- Clean and merge data
- Explore data with visualizations
- Build and share easy-to-update dashboards
- Create an online access to the dashboards via web, phones and/or tablets

## Objectives

- Import data from a variety of sources, cleanse, transform and merge them together
- Create simple data visualizations based on cleaned data
- Create a basic report, configure security rules and publish it on the online service

## Content

- **Discover Power BI Desktop**
  - Discover the query editor (import and clean data from different sources)
  - Discover the Data section (explore data tables)
  - Discover the Relationships section (build relationships between tables)
  - Discover the Report section (build data visualizations)
- **Build queries**
  - Import data
  - Clean, transform and improve data
  - Merge data from different sources
  - Use basic M code
- **Data visualization**
  - Use the most popular options of the fields pane
  - Use the most popular options of the visualization pane
  - Discover the filter, sort, drill down, drill across functionalities and more
- **Power BI Service overview**

## Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

## Targeted learners

The targeted learners for this beginner Power BI training course are the professionals who have a lot of data to analyze and who are looking for a self-service BI solution (Business Intelligence).

## Trainer

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural

talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

### **Prerequisites**

No prerequisites.

### **Required material**

Each trainee must have access to a computer equipped with Power BI Desktop.

### **Inclusions**

Course registration includes:

- PDF document with step by step instructions to build the course report
- Data sources for the course report
- .pbix file with the solution
- Bonuses

### **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

## POWER BI (LEVEL 2)

### Summary

This intermediate Power BI training course is conducted exclusively in Power BI Desktop (software available for free download from the Microsoft website). Throughout this training, the trainee will import unstructured data from various sources and transform, merge and analyze it. In the end, the trainee will build a report that will allow to properly analyze profit margins and variances between actuals and budget in an original and relevant way.

### Objectives

- Build your own data transformation functions in Power Query and learn how to fix bugs
- Build a data model from different data sources with different level of aggregations
- Build more complex data visuals with simple DAX measures
- Build reports to analyze profit margins and variances between actuals and budget

### Content

- **Master the query editor**
  - Combine files in a folder efficiently
  - Perform advanced data transformations
  - Build a function from a query
  - Apply your custom function to other data sources
  - Detect and correct errors in a custom function
  - Transform data tables to get to the same level of aggregation
  - Study the different types of joins between tables
- **Master the main interface of Power BI Desktop**
  - Create relationships between different tables to build a data model
  - Use more than one fact table in the data model
  - Explore the DAX language to create simple measures
  - Explain variances between actual and budgeted margins with different approaches
  - Use different visualizations to make variances stand out (red, yellow, green) and allow for drilling
  - Add conditional formatting to visualizations
  - Analyze increases and decreases in data with built-in artificial intelligence functionality

### Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

### Targeted learners

This intermediate Power BI training course is intended for professionals who need to manipulate and analyze a lot of data and who are looking for a powerful self-service BI (Business Intelligence) tool. It is also intended for those who have completed the [Power BI training \(level 1\)](#) or who have an equivalent experience.

### Trainer

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with

her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

### **Prerequisites**

To find out whether or not you should take this training, we strongly suggest that you take an [online quiz](#). If your score is less than 70%, we strongly suggest to attend our [Power BI \(level 1\)](#) training course (public, private or online) before attending this training course.

### **Required material**

Each trainee must have access to a computer equipped with Power BI Desktop.

### **Inclusions**

This intermediate Power BI training course registration includes:

- a PDF document with all the instructions, step by step, to build your report
- the data sources
- the .pbix files with the solutions
- a reference website with additional resources
- a forum to ask questions

### **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# POWER BI (LEVEL 3)

## Summary

This Power BI advanced training course is conducted exclusively in Power BI Desktop (software available for free download from the Microsoft website). Throughout this training, the trainee will import unstructured data from various sources and will transform, merge and analyze it. The trainee will work with data over 3 years and will build DAX measures in order to calculate year-to-date values, differences vs previous year, etc. The training business case is very close to what professionals will need to do in their professional "real-life" situation. It also provides an introduction to advanced Power BI functionalities such as scenario parameters and a deeper dive into the DAX language.

## Objectives

- Build a dynamic date table
- Build a data model using multiple fact and dimension tables
- Create advanced visuals and charts with DAX Time Intelligence measures
- Use advanced DAX language formulas and allow for in-depth data analysis

## Content

- **How to transform a complex text file**
  - Add custom and conditional columns, extract information and more
  - Replace values, fill down, split columns, merge columns and more
- **How to build a date table**
  - By using start date and end date from the fact table and using them as parameters
  - By using M code functions like Duration.Days and List.Dates
- **How to build a data model with two fact tables**
  - With a fact sales table and a fact inventory table
  - With multiple dimension tables
- **How to create powerful measures like**
  - Previous year's sales
  - Year-to-date sales (YTD)
  - Cumulative sales over the last x months
  - Difference in \$ between current and previous year's sales
  - Difference in % between current and previous year's sales
- **How to use natural language to build data visualizations**
  - And discover, in the process, how to create a top x sales by product or customer
- **How to use a data from a disconnected table**
  - To enable an analysis where you select, within a slicer, the measure you want to see in the report
  - By using the DAX language
- **How to create a comparable analysis**
  - Using the DAX language
- **How to create an inventory analysis**
  - By calculating the inventory requirement based on the monthly sales level
  - Using the DAX language
- **How to work with the scenario parameters**

- To let the user work with different assumptions (scenario analysis)
- To build sensitivity analysis
- **How to build creative tooltips**
  - To build powerful reports and allow for in-depth data analysis

### **Training duration**

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

### **Targeted learners**

This advanced Power BI training is intended for professionals who need to manipulate and analyze a lot of data and who are looking for a powerful self-service BI (Business Intelligence) tool. It is also intended for those who have completed the [Power BI training \(level 2\)](#) or who have an equivalent experience.

### **Trainer**

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

### **Prerequisites**

To find out whether or not you should take this training, we strongly suggest that you take an [online quiz](#). If your score is less than 70%, we strongly suggest to attend our [Power BI training \(level 2\)](#) training course (public, private or online) before attending this training course.

### **Required material**

Each trainee must have access to a computer equipped with Power BI Desktop.

### **Inclusions**

This intermediate Power BI training course registration includes:

- a PDF document with all the instructions, step by step, to build your report
- the data sources
- the .pbix files with the solutions
- a reference website with additional resources
- a forum to ask questions

### **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# INTRODUCTION TO DAX LANGUAGE (POWER BI AND POWER PIVOT)

## Summary

This course is an introduction to the DAX (Data Analysis Expression) language, used by Power Pivot and Power BI Desktop. Mastery of this language enables users of these two solutions to create flexible, easy-to-update dashboards, as well as advanced, relevant data visualizations. We recommend that you first take our Power BI training series.

## Objectives

- Identify the implicit and explicit evaluation contexts of a DAX measure.
- Write measures in DAX that consider evaluation contexts
- Create advanced data visualizations using strong measures written in DAX language

## Content

- **Introduction to the DAX language**
  - What is the DAX language?
  - How does DAX work?
  - Why do we need DAX?
  - Where can DAX be used?
  - How do I write a DAX formula?
  - What's the difference between a calculated column and a measurement?
  - What is an evaluation context?
  - What's the difference between a row context and a filter context?
  - What are the DAX language conventions?
- **Master the main DAX functions**
  - Understand aggregation and iteration functions
  - Understanding the RELATED and RELATEDTABLE functions
  - Understanding COUNTROWS functions
  - Understanding FILTER/DISTINCT/VALUES functions
  - Understanding CALCULATE functions
  - Understanding ALL functions
  - Understanding the EARLIER function
  - Understanding the FIRSTNONBLANK AND LASTNONBLANK functions
  - Understanding TIME INTELLIGENCE FUNCTIONS
  - Understand how to interweave these different functions
  - Bonus: Understanding how to work with fiscal calendars
  - Bonus: Understanding how to work with 4-4-5 calendars

## Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

## Targeted learners

The targeted learners for this training course are professionals who use Power Pivot and/or Power BI Desktop to analyze data and create high-performance, dynamic dashboards.

## **Trainer**

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

## **Prerequisites**

Before taking this course, learners should first have taken our [Power BI \(Level 3\) training](#), or have passed the associated [online quiz](#) with more than 70%.

## **Required material**

Each trainee must have access to a computer equipped with Power BI Desktop. Note: This course is offered via Power BI Desktop, but is also aimed at Power Pivot users in Excel. Therefore, learners who are not familiar with Power BI Desktop, but who use Power Pivot in Excel, will be able to transfer the concepts learned to Power Pivot for Excel without difficulty.

## **Inclusions**

This intermediate Power BI training course registration includes:

- a PDF document with all the instructions, step by step, to build your report
- the data sources
- the .pbix files with the solutions
- a reference website with additional resources
- a forum to ask questions

## **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# POWER BI FOR END USERS

## Summary

This beginner Power BI training course is designed for professionals who need to consume content created in Power BI (applications, datasets, reports and dashboards) and shared with them. It teaches how to use the Power BI web portal, how to use the mobile application, how to analyze and interact with shared content, and how to create your own analyses based on the shared data.

## Objectives

- Navigate with ease and autonomy in the Power BI web portal and in the Power BI mobile app
- Analyze and interact aptly with the data that is shared with you
- Create your own analyses based on the data that is shared with you via Power BI and via Excel

## Content

- Navigate the portal
- Interact with report filters and bookmarks
- Interact with other filter options
- Interact with other report tile features
- Perform advanced analysis from specific tiles
- Interact with the options of the reports themselves
- Create your own analyses on shared data - in power bi
- Create your own analyses on shared data - in excel
- Interact with the elements of a dashboard
- Use the power bi mobile application
- Bonus: discover other interesting features
- What to remember about Power BI from an end-user perspective

## Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

## Targeted learners

This training is for professionals who need to consume Power BI content that has been created and shared by colleagues in their organization. These professionals will not be in charge of creating reports or dashboards for the organization but may want to create their own analysis for their own needs. Similarly, they need to become familiar with the Power BI online service and mobile app and learn how to interpret and interact with the content that is shared with them. In addition, they need to be able to share feedback with their colleagues.

## Trainer

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored

to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

### **Prerequisites**

This training has no prerequisites. It is intended for anyone who needs to consume content via the Power BI portal and/or mobile application.

### **Required material**

Each learner must use a laptop and have a Power BI account with a pro license or be willing to access the free trial version, which will be presented during the training.

### **Inclusions**

This intermediate Power BI training course registration includes:

- a PDF document with all the instructions, step by step, to build your report
- the data sources
- the .pbix files with the solutions
- a reference website with additional resources
- a forum to ask questions

### **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# Introduction to Artificial Intelligence for Excel (ChatGPT & Copilot)

## Summary

This training course offers a practical and accessible introduction to artificial intelligence applied to Excel, with a focus on Copilot and ChatGPT tools. It allows participants to discover how these technologies can transform the way they explore, analyze, and present data, while supporting you in certain complex tasks in Excel.

## Objectives

- Understand the basic principles of AI applied to Excel
- Use Copilot and/or ChatGPT to support your daily tasks in Excel
- Leverage Copilot and/or ChatGPT to generate formulas, analyze data, and create visualizations
- Prepare, sort, and interpret data efficiently
- Create pivot tables, charts, and forecasts using AI
- Identify relevant use cases for integrating AI into everyday life

## Content

### Module 1: Introduction to AI for Excel

- Training schedule
- General information
- Source data used
- Introduction to Copilot for Excel
- Introduction to Copilot Chat
- Introduction to ChatGPT
- Introduction to prompts

### Module 2: Exploring and understanding your data

- Introduction to data exploration
- Data preparation
- Sorting, filtering, and formatting
- Understanding and interpreting formulas
- Analyzing data with the help of AI

### Module 3: Creation assistance

- Generating formulas with Copilot or ChatGPT
- Creating pivot tables
- Generating relevant charts
- Create automatic forecasts
- Create a smart template
- Obtain internal or external data

### Module 4: Conclusion and bonus

- Bonus: Learn to learn with AI
- Bonus: Programming support (VBA, scripts)

- Bonus: Clean text data
- Comparison of tools (Copilot vs ChatGPT)

### **Training duration**

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

### **Targeted learners**

This training is intended for professionals who regularly work with Excel and wish to discover how AI can be integrated into their daily work.

### **Trainer**

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

### **Prerequisites**

This training is intended for professionals who:

- Are generally comfortable with computers
- Regularly use Excel

### **Required material**

Each participant must use a laptop, an Office 365 or Microsoft 365 license, and an active internet connection.

### **Inclusions**

This course registration includes:

- a PDF document with all the instructions, step by step, to build your report
- the data sources for the labs
- a series of video capsules with demonstrations
- a reference website with additional resources
- a forum to ask questions

### **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# EXCEL FOR BEGINNERS

## Summary

This training course is intended as an introduction to the Excel software package in Microsoft Office. It teaches the basics, best business practices, and highlights common mistakes.

## Objectives

- Create and save a workbook
- Navigate the structure of an Excel file (workbooks, tabs, columns, rows, cells)
- Enter information into a workbook
- Analyze and process information using basic functions
- Format values within a workbook
- Prepare a workbook for printing

## Content

### PART 1: Excel workbooks, their creation, content, and maintenance

- Introduction to Excel
- How to create a blank Excel file
- What is a workbook? A tab? A row? A column? A cell?
- How to create an Excel file from a template
- How to enter information into an Excel file
- How to save an Excel file
- How to open an existing Excel file

### PART 2: Data processing and analysis in Excel

- Using formulas to process and analyze data
- How to create a function using the function editor
- How to create a function manually
- Overview of different types of functions
- How to use basic functions
- Sum
- Max/Min/Average
- Introduction to the IF function
- How to use Microsoft Help to create functions
- How to use basic paste options
- How to insert images and shapes into your Excel workbooks

### PART 3: Layout and formatting in Excel

- How to manage cell formatting
- Discover formatting options in Excel
- Discover cell alignment options
- Discover the format painter (copy formatting)
- How to manage the page layout of your Excel files
- Discover the display options in Excel
- Discover the page layout options in Excel

## Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

**Targeted learners**

The target audience consists of professionals who need to use Excel files in their work and are new to the software.

**Trainer**

Audrée Pellerin is a passionate professional, holding a master's and bachelor's degree in Corporate Finance from the University of Sherbrooke. With several years of experience in the field of consulting services, she has worked with SMEs, multinational corporations, and public sector organizations. Audrée stands out with her dual expertise as a business intelligence consultant and experienced trainer. She possesses a natural talent for explaining complex concepts in a clear and accessible manner and is recognized for her ability to impart knowledge with patience and professionalism. As a trainer, Audrée plays a vital role in helping companies strengthen the skills of their internal teams. She develops customized training programs tailored to the needs of her clients and guides participants through interactive and engaging sessions. Her pedagogical approach promotes active learning and the practical application of acquired knowledge.

**Prerequisites**

No prerequisites.

**Required material**

Each participant must use a laptop, an Office 365 or Microsoft 365 license, and an active internet connection.

**Inclusions**

This course registration includes:

- a PDF document with all the instructions, step by step, to build your report
- the data sources for the labs
- a series of video capsules with demonstrations
- a reference website with additional resources
- a forum to ask questions

**Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# EXCEL INTERMEDIATE LEVEL

## Summary

This training course aims to get the trainees to a sound Excel proficiency. As such, it is aimed towards the professionals who are already using Excel in their day-to-day work activities but want to get a deeper understanding, save time and build better solutions. This training session is also a prerequisite for the following training courses : [Excel – Dashboards \(level 1\)](#) and [Excel - Financial Modeling \(level 1\)](#).

## Objectives

- Apply our best tips and tricks for Excel intermediate level
- Automate the calculations of an Excel file
- Create more user-friendly work interfaces for users
- Eliminate the risk of miscalculations

## Content

- **Functions**
  - Mastering absolute and relative references to create powerful formulas
  - Using the F2 function to trace and understand the formulas in a worksheet
  - Using the SUMPROD function
  - Using the SUMIF, COUNTIF and AVERAGEIF functions
  - Using the SUMIFS, COUNTIFS and AVERAGEIFS functions
  - Using the HLOOKUP and VLOOKUP functions
  - Using the MATCH function
- **Introduction to formulas with embedded functions**
  - Building embedded functions with VLOOKUP, HLOOKUP and MATCH functions
  - Building embedded functions with INDEX and MATCH functions
  - Building embedded functions with MIN and MAX functions
  - Building embedded functions with LARGE and SMALL functions
- **Defined names**
  - Naming a single cell
  - Naming a whole row or column
  - Naming an array of cells
  - Naming an offset cell
  - Using the name manager
- **Data validation**
  - Setting a basic data validation
  - Setting a data validation with messages to the users
  - Setting a data validation with custom formulas
- **Functionalities**
  - Using advanced sorting and filtering options
  - Using the goal seek functionality
  - Using the F5 function (go to)
- **Introduction to charts and pivot tables**
  - Creating a basic chart
  - Creating a basic pivot table

## **Training duration**

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

## **Targeted learners**

The targeted trainees are professionals who are already using Excel in their day-to-day work activities but want to get a deeper understanding of Excel. This training session is also a prerequisite to whom would like to register for the Excel – [Excel – Dashboards \(level 1\)](#) and for [Excel - Financial Modeling \(level 1\)](#) training courses.

## **Trainer**

Sophie Marchand, M.Sc., holds a B.A. in Business Administration and an M.Sc. in Corporate Finance from the Université de Sherbrooke. She has been a member of the Ordre des CPA du Québec for nearly 20 years, and held the title of MVP Office Apps and Services (Excel) and MVP Data Platform (Power BI) between 2014 and 2023. The MVP title is an honorary title awarded by Microsoft and stands for “Most Valuable Professional”. In 2015, she also created the Montreal Modern Excel and Power BI user group, which she managed and led until 2022. Ms. Marchand has nearly twenty years' experience in the business world, as an expert in financial modeling and business intelligence with Excel and Power BI. It is the combination of her in-depth knowledge of finance and accounting with her computer skills that has made her a high value-added trainer who encourages professionals to surpass themselves and develop their full potential.

## **Prerequisites**

This is an intermediate level training session. This means trainees should already be using Excel on a daily basis but not mastering the functions and functionalities mentioned in the content section. To find out whether or not you should take this training, we strongly suggest that you take an [online quiz](#). If your score is 70% or higher, you are ready to begin the Excel—Intermediate Level course. Otherwise, we strongly recommend that you first learn the basics of Excel before taking the Intermediate Level course.

## **Required material**

Each trainee must have access to a portable computer equipped with MS Excel 2007 or more for Windows, or MS Excel 2011 or more for Mac.

## **Inclusions**

This intermediate Power BI training course registration includes:

- a PDF document with all the instructions
- the .xlsx files with the solutions
- a reference website with additional resources and a forum to ask questions

## **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# EXCEL FINANCIAL MODELING (LEVEL 1)

## Summary

This training course is an introduction to the best practices in financial modeling in Excel. It teaches how to handle Excel functions and functionalities in order to build effective financial models that allow financial forecasts, scenario analysis and sensitivity analysis.

## Objectives

- Apply best business practices in financial modeling
- Create scenario analysis and sensitivity analysis
- Eliminate calculation errors through the use of advanced functions and modeling techniques
- Apply the Excel functions necessary to develop a dynamic and efficient financial model

## Content

- **Introduction to financial modeling**
  - What is a financial model?
  - What are dependent and independent variables?
  - What are the best practices in financial modeling in Excel?
- **Scenario and sensitivity analysis**
  - How to build a one-variable sensitivity table?
  - How to build a two-variable sensitivity table?
  - How to use the switch technique?
  - How to use the multiplier technique?
  - How to use the delay technique?
  - How to use the input technique?
  - How to use the scenario manager?
- **Excel financial modeling functions**
  - How to use the following functions for more flexibility: Index, Match, If, Or, And, SumIf, SumIfs, Sumproduct, Offset.
- **Interaction between forecast and actual data**
  - How to work with actual data and build a rolling forecast?
  - How to build a variance analysis between actual and forecast data?
- **Presentation tips**
  - What functions to use to build quick summaries?
  - How to improve a financial model with the Indirect and the Address functions?
  - How to improve the presentation with the Round and IsError functions?
- **Optimization tips**
  - How to add total controls and validation pages?
  - How to audit a financial model?
  - How to protect a financial model?
  - How to document a financial model?

## Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

## **Targeted learners**

The targeted learners are the professionals who are already using Excel in their day-to-day work activities and have to build financial forecasts, budgets, business cases and data analysis aiming at supporting business decision making.

## **Trainer**

Sophie Marchand, M.Sc., holds a B.A. in Business Administration and an M.Sc. in Corporate Finance from the Université de Sherbrooke. She has been a member of the Ordre des CPA du Québec for nearly 20 years, and held the title of MVP Office Apps and Services (Excel) and MVP Data Platform (Power BI) between 2014 and 2023. The MVP title is an honorary title awarded by Microsoft and stands for “Most Valuable Professional”. In 2015, she also created the Montreal Modern Excel and Power BI user group, which she managed and led until 2022. Ms. Marchand has nearly twenty years' experience in the business world, as an expert in financial modeling and business intelligence with Excel and Power BI. It is the combination of her in-depth knowledge of finance and accounting with her computer skills that has made her a high value-added trainer who encourages professionals to surpass themselves and develop their full potential.

## **Prerequisites**

To find out whether or not you should take this training, we strongly suggest that you take an [online quiz](#). If your score is less than 70%, we strongly suggest to attend our [Excel - Intermediate level](#) training course before attending this training course.

## **Required material**

Each learner must have access to a portable computer equipped with MS Excel 2007 or more for Windows, or MS Excel 2011 or more for Mac.

## **Inclusions**

This intermediate Power BI training course registration includes:

- a PDF document with all the instructions
- the .xlsx files with the solutions
- a reference website with additional resources and a forum to ask questions

## **Certificate of completion**

At the end of this training, the participants will receive a certificate of completion. This certificate will include the trainer's Emploi-Québec accreditation number, the participant's name, the title and date of the training, the number of hours of training completed, the number of Continuing Education Units (CEUs), as well as the name and signature of the trainer. This certificate meets the requirements of the continuing education obligations of the Quebec professional orders.

# EXCEL DASHBOARDING (LEVEL 1)

## Summary

This training course is an introduction to Excel dashboarding. Your company decided to implement a dashboard in Excel, but where to start? What will you include in your dashboard? How will you structure and show your data? How will you feed your dashboard? Those are the type of questions you will be facing and those are the type of questions we will be answering.

## Objectives

- Design an action plan and a framework for the implementation of a new dashboard
- Create advanced pivot tables, which will serve as calculation engines for dashboard charts and visualisations
- Create a dashboard with charts based on a set of data in Excel

## Content

- **Introduction to dashboarding**
  - What is business intelligence?
  - What is a dashboard?
  - Why build a dashboard?
  - What are the best attributes of a dashboard?
  - What is a key performance indicator (KPI)?
  - What are the steps to build a dashboard?
  - Why choose Excel for your dashboard?
- **Pivot tables**
  - How to build an efficient pivot table?
  - How to benefit from the inner functionalities of a pivot table?
  - How to optimize the calculations within a pivot table?
  - How to optimize the presentation of a pivot table?
- **Charts**
  - How to pick the right chart to share the right message?
  - How to deal with the chart data series?
  - How to optimize the presentation of a chart?
  - How to build dynamic charts?

## Training duration

This online training course lasts approximately 6 hours (3 hours of video and about 3 hours of exercises).

## Targeted learners

The targeted learners are the professionals who are already using Excel in their day-to-day work activities and who need to analyze and report data with regular reports and/or dashboards.

## Trainer

Sophie Marchand, M.Sc., holds a B.A. in Business Administration and an M.Sc. in Corporate Finance from the Université de Sherbrooke. She has been a member of the Ordre des CPA du Québec for nearly 20 years, and held the title of MVP Office Apps and Services (Excel) and MVP Data Platform (Power BI) between 2014 and 2023. The MVP title is an honorary title awarded by Microsoft and stands for “Most Valuable Professional”.

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