

Excel and Power BI Course Recommendations



ACCESS ANALYTIC

Excel Productivity	Excel Power Query and Power Pivot	Power BI Essentials	Power BI Advanced	Financial Modelling in Excel
1 Day	2 days (3rd Optional Day)	2 days (3rd Optional Day)	2 days (3rd Optional Day)	2 - 5 days
Excel Productivity E5	PQ and PP D3	Power BI Essentials D6	Power BI Advanced D7	Financial Modelling B9
You have Excel 365 (or Excel 2021)	You have Excel 365 (or Excel 2019) and maybe are considering using Power BI	You have (or will have) a Power BI Licence	You've been using Power BI for at least a few months and you are struggling with DAX or more advanced Power Query Techniques	You're comfortable with functions such as SUMIFS, VLOOKUPS,
You're not familiar with XLOOKUP, FILTER, UNIQUE (and other Dynamic Array formulas)	You've used Pivot Tables before, but would like to write calculations such as variances, cumulative totals etc (intro to DAX)	You're comfortable with Pivot Tables	You feel you could learn more regarding model design / optimisation principals	You want to build forecasting models for Cash and future Profit estimates
You'd like to learn the best Excel tips and tricks to save you time	You're comfortable with VLOOKUPS or INDEX MATCH, and you use them fairly often	You're comfortable with VLOOKUPS or INDEX MATCH, and you use them fairly often	Filter Context Transition is a bit of a mystery	You need to consider financing structures and running scenarios
You'd like to automate the cleaning up of messy source data and you've never / rarely used Power Query	You use Excel for regular reporting and would like it to be more automated. Maybe you have big files / inflexible reports with lots of formulas and slow performance	You use Excel or other Business Intelligence software for regular reporting and would like the users to have access to an interactive, secure, single version of your reports	You want to explore having centralised Datasets and discovering Dataflows	Maybe you've attempted to build a forecasting model before, but want to learn best practice
Pivot Tables are frustrating or a bit of mystery and you'd like to know how to build a dynamic dashboard	You'd like to learn about Pivot Charts, Slicers and Dashboards	You'd like to learn the key features that are critical in getting started with Power BI		
You currently Merge cells and Hide Columns / Rows	You'd like to automate the cleaning up of messy source data and you've never used / occasionally used Power Query	You may or may not be familiar with Power Query		
	You'd like to improve how you build your regular reports and understand how this Excel functionality relates to Power BI	Maybe you've self taught Power BI and are stuck on key concepts or best practice		