



Data Analysis and Reporting Techniques Using Excel



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Meirc
Training & Consulting

Why Attend

It is a fact, Excel is the accountant's, finance and business professional's best friend! You and I know how overwhelmed we are with the abundance of unstructured data. Monthly, quarterly and annual closing are immensely data driven and require moving and exporting data from 'ERPs' and databases to Excel. This hands-on course will advance your data massaging, modeling, integration and automation skills to new levels. You will also master normalization and massaging of noisy data, preparation of reports, analysis and reconciliation.

This course is Excel based allowing you to develop an exclusive level of expertise and adding immediate value to your job and company.

Course Methodology

20% of the course is design and structure focused. 80% uses MS Excel as a powerful tool to perform daily, monthly and periodic tasks. Groups and individuals will be required to complete exercises, case studies, and projects on daily basis.

Course Objectives

By the end of the course, participants will be able to:

- Boost Excel Business Intelligence (BI) expertise in business and management reporting.
- Link their Excel with PowerPoint for dynamic data update.
- Develop dynamic BI dashboards, scorecards and flash management reports to assist professionals in measuring performance and enhancing decision making.
- Perform data analysis techniques to produce timely and accurate reports.

Target Audience

Business, finance and accounting professionals, senior and junior accountants, business analysts, research professionals, marketing and sales, administrative staff, supervisors, general business professionals and staff from any function who need to learn and apply state-of-the-art techniques to their daily business reporting, reconciliations, and analysis.

Target Competencies

- Massaging of unstructured and noisy data
- Reporting, analysis, and reconciliation
- Data modeling
- Integration with external data sources

Course Outline

- Tools and Techniques
 - Consolidating Data from Separate Files and Sheets
 - Advanced Data Validation Using Lists, Dates and Custom Validation
 - Array Functions
 - Cell Management Tools: Left, Right, Mid, Concatenate, Value
 - Naming Cells and Ranges
 - Subtotal, Sumif, Sumifs, Sumproduct
 - Looking-Up Data, Texts, and Values Using Vlookup
 - The Incredible Table Tools Techniques
 - Slicing Dates into Day Names, Month Names, Years and Quarters
 - Text to Columns and Dynamic Trimming Using Trim, Len
 - Find and Substitute
 - Text Change Functions
- The 19 Must Learn Pivot Tables Tools
 - Creating Pivot Tables



- Number Formatting Techniques
 - Designing Report Layout
 - Sorting in Ascending, Descending and More Sort Options
 - Filtering Labels and Values
 - Expanding and Collapsing Reports
 - Summarize Data By Sum, Average, Minimum, Maximum, Count
 - Show Values as % of Total & % of ...
 - Pivot Table Options
 - Inserting Formulas
 - Date Analysis
 - Copying Pivot Tables
 - Creating Pivot Charts
 - Dynamic Chart Labeling
 - Mastering the Slicer
 - Showing Report Filter Pages
 - Linking Pivot Tables and Pivot Graphs with PowerPoint
 - Conditional Formatting with Pivot Tables
 - Designing Reports Using the GetPivotData
- Report Design and Modeling Techniques
 - Spinner
 - Check Box Data Modeling with IF function
 - Option Box Data Modeling with IF function
 - List Box Data Modeling with CHOOSE function
 - Scenario Manager
- Tips and Tricks in Excel
 - Data Entry Form
 - Custom List
 - Text to Speech
 - Protecting Worksheets and Workbooks



Associations

National Association of State Boards of Accountancy (NASBA) : Meirc Training & Consulting is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website www.learningmarket.org



Fees: US\$ (including coffee breaks and a buffet lunch daily)

Per participant - 2019

US\$ 3600

Fees + VAT as applicable

UAE Tax Registration Number 100239834300003



Courses in Accounting and Finance

Dates	Course Name	Language	Location	Fees
7 - 11 Jul, 2019	Efficient Finance and Accounting Operations: 2019 Best Practices and Updates	Arabic	Dubai	US\$ 4800
14 - 18 Jul, 2019	International Financial Reporting Standards (IFRS) and 2019 Updates	Arabic	Dubai	US\$ 4800
14 - 18 Jul, 2019	Next Generation Excel: Advanced Business and Financial Reporting	English	Dubai	US\$ 4800
21 - 25 Jul, 2019	Fast Closing Monthly and Year-End Accounts	English	Dubai	US\$ 4800
21 - 25 Jul, 2019	Forecasting and Analyzing Cash Flow	English	Dubai	US\$ 4800
28 Jul - 1 Aug, 2019	Financial Modeling Workshop Using Excel	English	Dubai	US\$ 4800
4 - 8 Aug, 2019	Finance for Non-Finance Professionals	English	Dubai	US\$ 4800
4 - 8 Aug, 2019	Financial Accounting and Reporting	Arabic	Dubai	US\$ 4800
25 - 29 Aug, 2019	Advanced Financial Analysis	English	Istanbul	US\$ 4800
1 - 5 Sep, 2019	Accounting for Non-Accountants	Arabic	Dubai	US\$ 4800
1 - 5 Sep, 2019	Dynamic Business Reports and Dashboards Using Excel	English	Dubai	US\$ 4800
4 - 6 Sep, 2019	Advanced Financial Analysis: A Hands-On Workshop	English	Beirut	US\$ 3600
8 - 12 Sep, 2019	Corporate Finance Workshop	English	Dubai	US\$ 4800
8 - 12 Sep, 2019	Efficient Finance and Accounting Operations: 2019 Best Practices and Updates	English	Abu Dhabi	US\$ 4800
8 - 12 Sep, 2019	Financial Analysis Workshop	English	Dubai	US\$ 4800
8 - 12 Sep, 2019	Payroll: Preparation, Analysis and Management	English	Dubai	US\$ 4800
15 - 19 Sep, 2019	Accounts Receivable and Credit Policies Management	Arabic	Dubai	US\$ 4800
15 - 19 Sep, 2019	International Financial Reporting Standards (IFRS) and 2019 Updates	English	Dubai	US\$ 4800
15 - 19 Sep, 2019	Professional Skills for Finance and Accounting	English	Istanbul	US\$ 4800
22 - 26 Sep, 2019	Certificate in Accounting and Financial Control	English	Dubai	US\$ 5100
22 - 26 Sep, 2019	Financial Acumen: Roadmap to Business Success	English	Dubai	US\$ 4800
29 Sep - 3 Oct, 2019	Certificate in Treasury and Cash Management	English	Riyadh	US\$ 5100



Courses in Accounting and Finance

Dates	Course Name	Language	Location	Fees
29 Sep - 3 Oct, 2019	Management Reporting for Business Performance Review	English	Dubai	US\$ 4800
6 - 10 Oct, 2019	Advanced Financial Analysis	English	Dubai	US\$ 4800
6 - 10 Oct, 2019	Effective Budgeting and Cost Control	Arabic	Dubai	US\$ 4800
6 - 10 Oct, 2019	Preparing Financial Statements and the Annual Report	English	Dubai	US\$ 4800
13 - 17 Oct, 2019	Certificate in Modern Accounting and Finance Operations	English	Dubai	US\$ 5100
13 - 17 Oct, 2019	Fast Closing Monthly and Year-End Accounts	English	Dubai	US\$ 4800
13 - 17 Oct, 2019	Next Generation Excel: Advanced Business and Financial Reporting	English	Dubai	US\$ 4800
20 - 24 Oct, 2019	Accounts Payable: Accounting and Management Best Practices	Arabic	Riyadh	US\$ 4800
20 - 24 Oct, 2019	Financial Accounting and Reporting	English	Dubai	US\$ 4800
20 - 24 Oct, 2019	Financial Forecasting: Tools and Techniques	English	Dubai	US\$ 4800
20 - 24 Oct, 2019	Managing the Collections and Credit Control Team <small>PLUS</small>	English	Dubai	US\$ 4800
27 - 31 Oct, 2019	Finance for Non-Finance Professionals	English	Dubai	US\$ 4800
3 - 7 Nov, 2019	Certificate in Treasury and Cash Management	English	Dubai	US\$ 5100
3 - 7 Nov, 2019	Trade Finance, Letters of Credit and Bank Guarantees	English	Dubai	US\$ 4800
10 - 14 Nov, 2019	Certificate in Advanced Budgeting and Forecasting	English	Dubai	US\$ 5100
10 - 14 Nov, 2019	Certificate in Advanced Financial Modeling	English	Dubai	US\$ 5100
10 - 14 Nov, 2019	Certificate in International Financial Reporting Standards (CertIFR): Preparation Course	English	Dubai	US\$ 5100
10 - 14 Nov, 2019	Payroll: Preparation, Analysis and Management	Arabic	Dubai	US\$ 4800
17 - 21 Nov, 2019	Accounts Payable: Accounting and Management Best Practices	English	Dubai	US\$ 4800
17 - 21 Nov, 2019	Advanced Financial Analysis	Arabic	Dubai	US\$ 4800
17 - 21 Nov, 2019	Certificate in Fixed Assets Accounting and Management	English	Dubai	US\$ 5100
24 - 28 Nov, 2019	Advanced Excel: Power Query, Power Pivots and Macros	English	Dubai	US\$ 4800
24 - 28 Nov, 2019	Finance for Non-Finance Professionals	Arabic	Dubai	US\$ 4800



Courses in Accounting and Finance

Dates	Course Name	Language	Location	Fees
24 - 28 Nov, 2019	Forecasting and Analyzing Cash Flow	English	Dubai	US\$ 4800
1 - 5 Dec, 2019	Efficient Finance and Accounting Operations: 2019 Best Practices and Updates	English	Dubai	US\$ 4800
8 - 12 Dec, 2019	Accounts Receivable and Credit Policies Management	English	Dubai	US\$ 4800
8 - 12 Dec, 2019	International Financial Reporting Standards (IFRS) and 2019 Updates	Arabic	Dubai	US\$ 4800
8 - 12 Dec, 2019	Professional Skills for Finance and Accounting	English	Dubai	US\$ 4800
15 - 19 Dec, 2019	Accounting and Finance Policies and Procedures	English	Dubai	US\$ 4800
15 - 19 Dec, 2019	Advanced Financial Analysis	English	Dubai	US\$ 4800
15 - 19 Dec, 2019	Effective Budgeting and Cost Control	English	Dubai	US\$ 4800
22 - 26 Dec, 2019	Certificate in Cost Analysis, Control and Optimization	English	Dubai	US\$ 5100
22 - 26 Dec, 2019	Finance for Non-Finance Professionals	English	Dubai	US\$ 4800
22 - 26 Dec, 2019	Financial Accounting and Reporting	Arabic	Dubai	US\$ 4800



Meirc Timeline

