



Dynamic Business Reports and Dashboards Using Excel

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Meirc
Training & Consulting

Why Attend

Business professionals are frequently required to prepare management reports, scorecards, and dashboards. Attending this course will help you reach advanced Excel levels allowing you to produce such important reports. The course starts with pivot tables, the most important tool ever created to perform data reporting, analysis and reconciliation. It then continues with high level modeling techniques, integration and report visualization, and it ends with automation. Your take-away is guaranteed to add value to your daily and periodic tasks. This course is a must for every intermediate-level Excel user.

Course Methodology

15% of the course is theory based. 85% uses MS Excel as a powerful tool to design and prepare dynamic business reports, dashboards, and scorecards. Groups and individuals will be required to complete exercises, case studies and projects on a daily basis.

Course Objectives

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

- Use their Excel expertise in data slicing and dicing, data massaging, data aggregation, data integration with Access, web, text, SQL, and other databases using pivot tables
- Perform advanced and dynamic data validations
- Design outstanding visualization charts, dashboards, scorecards, and flash reports
- Develop master-level report solutions using advanced form controls and buttons
- Record, write and edit powerful macros that will perform routine tasks in no-time

Target Audience

Business professionals, accountants, finance analysts, senior and junior accountants, business analysts, accounting and finance professionals, research professionals, marketing and sales, administrative staff, supervisors, general staff from any function who need to learn and apply state-of-the-art techniques to their daily business reporting, reconciliations, and analysis. Pre-requisite: Intermediate-level Excel knowledge or attendance of Meirc's Next Generation Excel course.

Target Competencies

- Reporting, analyzing, and reconciling
- Data modeling
- Integration with external data sources
- Report structuring techniques
- Automation and macros
- Charting and visualization techniques

Note

This is a hands-on training course using laptops which will be made available by Meirc for the duration of the training. For courses outside the UAE, participants are required to bring their own laptops with a fully working version of Microsoft Excel 2013/2016.

Course Outline

- Essential reporting requirement skills
 - The 20 rules of pivot tables and pivot charts
 - Slicer techniques
 - Advanced pivot charts techniques
 - Multiple consolidation ranges
 - Importing text files
 - Connecting to access databases
 - Connecting to SQL databases
 - Customizing connections properties



- Advanced data structuring techniques
 - Custom and advanced data validation
 - Creating and managing innovative conditional formatting
 - Dependent drop down list
 - Data validation with conditional formatting
 - Data entry form
- Charting and visualization techniques
 - Creating dynamic labels
 - Using the camera tool
 - Working with formula-driven visualizations
 - Using fancy fonts
 - Working with sparklines
 - Fancy thermometer charts
 - Thermometer chart
 - Performance against chart range
- Building report solutions
 - Conceptualizing and understanding report solutions
 - Developing a report solution
 - Configuring spreadsheet report data options
 - Enabling background refresh
 - Refreshing data when opening the file
 - Combo-box modeling
 - List-box modeling
 - Spinner
 - Option-button modeling
 - Check-box data models
 - Combo box modeling
- Macro charged reporting
 - Recording, editing, testing VBA macros
 - Building a macro driven reconciliation program
 - Building budget variance reporting program
 - Building a vendor and invoice analysis report



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



Location & Date

1 - 5 Sep, 2019

English

Dubai

Raffles Dubai

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

Per participant - 2019

US\$ 4800

Fees + VAT as applicable

UAE Tax Registration Number 100239834300003



Courses in Accounting and Finance

Dates	Course Name	Language	Location	Fees
7 - 11 Jul, 2019	Certified Financial Manager	English	Dubai	US\$ 5100
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
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
29 Sep - 3 Oct, 2019	Management Reporting for Business Performance Review	English	Dubai	US\$ 4800



Courses in Accounting and Finance

Dates	Course Name	Language	Location	Fees
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 PLUS	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
24 - 28 Nov, 2019	Forecasting and Analyzing Cash Flow	English	Dubai	US\$ 4800
1 - 5 Dec, 2019	Efficient Finance and Accounting	English	Dubai	US\$ 4800



Courses in Accounting and Finance

Dates	Course Name	Language	Location	Fees
	Operations: 2019 Best Practices and Updates			
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

