



AREEF ALI & ASSOCIATES

BUSINESS SOLUTIONS



presents a 2-day, intensive, instructor led program.
Wed 17th & Thu 18th November 2021



Advanced Excel

Automating Data & Reports

Facilitator

Areef Ali BSc, FCCA, CA, MBA, MCT

Contact for inquiries or private group training sessions:

Mr. Areef Ali (868)-788-7538

excelsem@aaa-bsol.com



[Click here to register](#)



What participants say after attending our MS Excel training sessions...

"Areef was an excellent facilitator. Made everything simple, was willing to repeat steps and processes. Gave a lot of practical examples and encouraged us to speak about or bring to him our own practical examples and advised what can be done to improve same" VS

"Excellent all round...." DH

"Astonishing and Empowering..." WW

"Once again Areef has delivered a wonderful course that meets the demands of today's business world. Concise, relevant & powerful..." AB

"Great seminar. Excellent facilitator. Generally, a very informative course" AA

"Excellent seminar. Facilitator is extremely knowledgeable great teaching application etc" KH

"Both seminar + facilitator were excellent!" SR

"Great facilitator Great seminar I strongly recommend" RV

"This course is the best course I have attended." MT-G

"Exceeded my expectations re the level of time savings and smart short cut tools shown. Extremely value adding..." DL

"The sessions were well taught and delivered to expose us to the range of possibilities of Excel. A job well done! Thanks" DC

"Exceptional & Dynamic course everyone should do." KL

"Mr. Ali is very knowledgeable in this field.... This session will certainly assist me with my daily work. I highly recommend people to take the time and money and invest in this course. It is worth it." AAA

"The seminar was intensive but well planned. The facilitator was very knowledgeable and aimed to give realistic applications to the techniques taught." JH

"I was impressed within the first 10 minutes of the programme.... Overall, I thoroughly enjoyed this course, didn't know Excel was so powerful." NA

"Course was excellent, well planned and properly delivered, esp. for myself having some fairly good experience with excel and its functionalities..." VR

"I must say I was very impressed with Mr. Ali's presentation style. It was an apt mix of professionalism and a unique spin on Excel techniques. The case study was very interesting; pulling on a myriad of knowledge acquired throughout the sessions" J-MG

"Facilitator is very knowledgeable and explains content brilliantly so that I could understand" KP-G

"Seminar - an excellent opportunity to improve one's knowledge for personal and professional effectiveness and creativity. Facilitator makes the learning process very easy despite the complexity of the topic units" CP

"Excellent all round..." DH

*Attendee feedback form comments were used with approval. Participant initials are shown at the end of comment

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Advanced Excel

Automating Data & Reports

Overview

Many persons continue to work with manually linked spreadsheets and workbooks. The problem is that the process is error prone and requires a significant amount of time to manipulate and update the data and reports for the next reporting period. This course teaches you how you can use Excel's latest self-service business intelligence features to avoid these problems. You will learn how to automate creating reports directly from your data sources.

Session Format / Facilitation approach

This is a practical and highly interactive seminar with a mix of tutoring using real life examples, hands on exercises for each technique learnt, combination exercises and Q&As.

Who will benefit?

The target audience includes anyone wanting to create reports more effectively will benefit from this training program. Accounting and Finance, HR, Marketing, IT, Business Analysts, Audit and Operations staff can all benefit from this seminar.

Participant Prerequisites

You should have experience using Excel to prepare management reports and completed our Excel Secrets & Techniques in Management Reporting program and its exercises.



Virtual participants MUST have a Windows based laptop equipped MS Excel 2016 Professional Plus ,any version of Excel 2019 or Office 365 edition along with a reliable internet connection for these sessions. Face-to-face (F2F) classroom participants have the option to rent a laptop for use at the Centre during the class sessions.



What are your key learning points & benefits?

- **Develop advanced technical skills** to succeed at automating your reports today, with the newest techniques using Power Query, Power Pivot, Power View, and 3-D Map features.
- **Increase work productivity and save time.** The techniques you learn can reduce the duration of analysis tasks from hours to minutes, freeing up time for higher payoff activities.
- **Receive download links** to practice exercise, videos, other training materials & solutions.
- **Claim CPD hours** and a certificate for your attendance at this seminar.
- **Leverage the flexibility** of learning either from the comfort & safety of your home or office or at our Success Centre if you need more hands-on attention.

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Advanced Excel: Automating Data & Reports Seminar Pricing (\$ TTD)

	Attending Online? Virtual classroom options and pricing	
TTD\$2,800 + VAT = \$3,150		

	Attending at the Success Centre? Face-to-face (F2F) classroom options and pricing <i>Physical distancing and masks in compliance with COVID-19 guidelines. Limited seating for 5 attendees available Snacks, drinks & lunch provided</i>	
TTD\$3,500 + VAT = \$3,937.50		

		<u>Click here to register</u>		
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	Questions or feedback? areef@aaa-bsol.com (868) 788-7538
	   Click here or scan QR code to visit our website at www.aaa-bsol.com

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Advanced Excel:

Day 1 | 8:30am – 4pm | Wednesday 17th November 2021

Automating Data & Reports

Outline

15 minute morning and afternoon breaks at strategic intervals, hour long lunch at 12pm

Overview - Traditional vs new reporting techniques; Linked spreadsheet reporting; Power Query vs Power Pivots vs Power Maps Excel versions & setup for advanced reporting

Power Query for Data Preparation for Automation -

Working exercises / examples will be done together with participants to illustrate these techniques

- Auto link to different data sources using Excel
- Use the Excel Power Query Get & Transform menu for extraction and cleansing routines
- Split & join data to create reports, remove unwanted columns, rename columns, remove errors, changing data types, filling data,
- Get data in tabular format for reporting using the unpivot routine
- Automatically group data into categories
- Automate calculations using Power Query

Data consolidation techniques

Working exercises / examples will be done together with participants to illustrate these techniques

- Merging data from different sheets to create reports - automating inclusion of multiple columns to build reports.
- Automate appending data from multiple files as a data source to create reports.
- Merging comparison with VLOOKUP formula.
- Fuzzy logic lookups – set a similarity threshold to match values.
- Automation techniques for appending data from multiple sheets with either same sheet name or different sheet names as a data source to create reports.

Power Query - Date calendar

- How to create an automated calendar table to slice data / reports by different reporting periods.

Power Pivot Reporting

- Getting and loading data from multiple sources into PowerPivot: load data from text files, Excel files, databases, Power Query etc
- Automated filtering of unnecessary data from data sources prior to data load
- Creating relationships to allow drag and drop reporting across multiple data sources
- How to create calculated columns formulas and measures (sliceable calculations)
- Creating summary reports and PowerPivot dashboards from the data model

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Advanced Excel: Automating Data & Reports

Day 2

8:30am – 4pm

Thursday 18th November , 2021

Outline

15 minute morning and afternoon breaks at strategic intervals, hour long lunch at 12pm

Reporting Consolidation technique - Using 3D Formulas to create drag & drop reports where the report template is identical for different branches, segments, or territories.

Reporting with Dynamic Array formulas - How to create single cell formula dynamic reports – report expands automatically when data source updates (no refresh required)

3D Maps - Creating maps from the Power Pivot model / Excel tables to analyze the data.

Case Study: Building a Reporting model & Dashboard Reports

To make the ideas real we will use the business intelligence tools in Excel (Power Query, Power Pivots, Power View and Power Maps) to automate the creation of the dashboard reports from raw data for an organisation.

The process will be completed step by step, so participants are clear as to what is must be done. This will take approximately 5 hours of dedicated time on the 2nd day. It will rely and build on the ideas covered from day 1 of the seminar.

The case exercise includes tips, tricks & techniques related to:

- Fixing bad data to tabular form using Power query & loading it to the Power Pivot data model.
- Loading data from tables in the reporting file, loading data from other folders - Text & Excel files.
- Creating the relational model: set up of one-to-many relationships between the data sets loaded in Power Pivot.
- Creating tabular formulas and measure type calculations to analyse the model.
- Building and loading a calendar table: manual method vs the automated approach.
- Building an interactive dashboard report from Power Pivot Data model using regular Pivot tables.
- Building interactive Geographic summary reports using Maps & 3D Maps - Excel 2019 & above.

Recap all topics, Q&A

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Areef Ali & Associates Trainer Profiles

Facilitator Profile - Norman Lum-Hee MBA, MCT

Mr. Norman Lum-Hee brings over a decade of experience in facilitating diverse learner groups in both corporate and retail consumer environments. He has actively maintained the Microsoft Certified Trainer designation since 2008, holding certifications in the 2003, 2007, 2010, 2013, 2016 and 2019 editions of the Microsoft Office Specialist credential, as well as other software technologies like Microsoft Project and SharePoint Services.

His early career in banking and financial services cross-trained him in positions ranging from frontline customer service, sales, backroom administration, and call centre help desk operations - which ultimately gave him the impetus to become a full-time educator. Norman is committed to lifelong learning - he earned his MBA in 2019 and continues to explore developments in instructional design and active learning methodologies. In his free time, he practices Tai Chi and enjoys Latin & Ballroom dancing.

Facilitator Profile - Shakeel Hosein B.Sc., M.Sc., MCT

Shakeel Hosein is an IT trainer with over 10 years' experience in education and IT training. Shakeel possesses a Bachelor of Science (B.Sc.) degree in **Computer Science** from the University of Hertfordshire in England and a Master of Science degree in **Geoinformatics** from the University of The West Indies. He is a Microsoft Certified Trainer and holds an Expert Excel Certification in MS Excel versions 2019 & Office 365.

Shakeel has been a facilitator/ trainer with Areef Ali and Associates for the past five years in the areas of Microsoft Excel and Microsoft Power BI. During that time has taught basic and intermediate Excel, and basic Power BI. Also, he has assisted in training in Advanced Excel.

He has facilitated inhouse and onsite training for a number of organisations.

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Facilitator Profile - Areef Ali B.Sc., MBA, FCCA, MCT

Areef has over twenty-five (25) years of work experience in the Finance, training & business consulting fields, including three and a half years at Price Waterhouse where he was a member of the Audit and Business Advisory Services Group.

Areef served as a finance professional at the Methanol complex. Subsequently, he was appointed the Chief Accountant and then the Corporate Finance Head at a leading financial institution. In June 2006 Areef, started AAABS.

In-house & Public MS Excel & Power BI training

AABS has completed in-house training for diverse teams in MS Excel work productivity techniques, Power BI, Management reporting and Dashboard development. Our clients have included numerous organisations, both private and public sector.

Projects completed

We have completed many projects for clients including:

- Management reporting, KPI / Dashboard automation
- Business planning and financial modelling automation
- Risk Management & Compliance monitoring / reporting automation

Public Seminar Hosting

We have hosted many public seminars with world renowned experts in the fields of Advanced Excel, Management reporting, Marketing, Presentation techniques, Negotiation, Audit and Fraud examination

Facilities Management

In April 2017 Areef launched the "AA Success Centre". Our aim is to help organizations & individuals achieve success. The Centre is now available for rental to organizations for training, meeting room rentals and other event rentals.



We thank you for your consideration!

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