



# AREEF ALI & ASSOCIATES BUSINESS SOLUTIONS



*presents a 2-day, intensive, instructor led program  
Tue 14<sup>th</sup> & Tue 21<sup>st</sup> May 2024*



## 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](mailto: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 2019 or Office 365 edition along with a reliable internet connection for these 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.

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

	<b>Attending Online</b> Virtual classroom options and pricing	
TTD\$2,800 + VAT = \$3,150		

	<b>Attending Classroom</b> At our classroom with lunch & refreshments	
TTD\$3,500 + VAT = \$3,150		

Please do not hesitate to contact us if you would prefer a private session or inhouse session for your team.

		<a href="#"><u>Click here to register</u></a>		
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	<b>Questions or feedback?</b> <a href="mailto:areef@aaa-bsol.com">areef@aaa-bsol.com</a> (868) 788-7538
	Click here or scan QR code to visit our website at <a href="http://www.aaa-bsol.com">www.aaa-bsol.com</a>

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# Advanced Excel:

Day 1	8:30am – 4pm	Tuesday 14 <sup>th</sup> May 2024
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## 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

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Auto link to different data sources using Excel</li><li>• Use the Excel Power Query Get &amp; Transform menu for extraction and cleansing routines</li><li>• Split &amp; join data to create reports, remove unwanted columns, rename columns, remove errors, changing data types, filling data,</li></ul> | <ul style="list-style-type: none"><li>• Get data in tabular format for reporting using the unpivot routine</li><li>• Automatically group data into categories</li><li>• Automate calculations using Power Query</li></ul> |
|--|---|

#### **Data consolidation techniques**

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

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|--|--|
| <ul style="list-style-type: none"><li>▪ Merging data from different sheets to create reports - automating inclusion of multiple columns to build reports.</li><li>▪ Automate appending data from multiple files as a data source to create reports.</li><li>▪ Merging comparison with VLOOKUP formula.</li></ul> | <ul style="list-style-type: none"><li>▪ Fuzzy logic lookups – set a similarity threshold to match values.</li><li>▪ Automation techniques for appending data from multiple sheets with either same sheet name or different sheet names as a data source to create reports.</li></ul> |
|--|--|

#### **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

Tuesday 21<sup>st</sup> May 2024

## 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.

**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 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 - 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.

### Facilitator Profile - Joseph Alexander MBA, BSc, MCT

Joseph Alexander is a certified Microsoft Office Specialist and Microsoft Certified Trainer with over ten years of teaching experience. He is a skilled training facilitator and has conducted training programs for hundreds of employees in various companies across Trinidad and Tobago. His expertise also includes course development, training management , and workforce assessment. He has successfully developed and delivered several training courses in Information Technology programs such as Windows 10/11, Microsoft Office, and Microsoft Teams.

Mr. Alexander possess a genuine passion for training and development, which shines through in every session he conducts, making it a memorable and enjoyable experience for the participants. He is also known to have the ability to make complex topics simple and easy to understand, as well as being very patient with slower paced learners. He consistently receives overwhelmingly positive feedback from the participants at the end of every training program he delivers. Mr. Alexander's core emphasis is always upon improving workforce productivity to increase company efficiency and profitability.

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

Areef has over twenty-nine (29) 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 to pursue his passion for training and people development.

### **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
- Process 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.



We thank you for your consideration!

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