MS Excel Reporting, Data Analysis & Dashboards– 5 DAYS

Skills Category: Finance

Unit Standard:

NQF Level

Credits:

Prospect Plus

Training & Consulting

Unlocking your hidden Potential

Target Audience

Minimum 8 Delegates

MS Excel Reporting, Data Analysis & Dashboards is ideal for all persons using Excel spreadsheets. Professions that have attended include accountants, actuaries, auditors, business analysts, chartered accountants, civil engineers, construction, consulting, corporate finance, engineers, farming, finance.

Course Objectives

- ❖ Build easy to use Budgets and Forecasts
- ❖ Aggregate the budgets and forecasts in the easiest possible way
- ❖ Run sensitivities on their models
- ❖ Understand and make use of Pivot Tables
- ❖ Report their findings graphically via charts and other visualisation techniques
- ❖ Identify/ remove duplicates in a spreadsheet
- ❖ Perform fuzzy logic (find cells that are similar to xyz)
- ❖ Change the colour of cells depending on what is in the cell
- ❖ Add risk robots to their reports
- ❖ Understand what formulas are doing and easily see where they come from
- ❖ Handle text issues i.e. joining cells, splitting them, finding key words in cells
- ❖ Joining/ comparing databases to identify duplicates and merge spreadsheets
- ❖ Understand and use dates correctly
- ❖ Avoid errors in their spreadsheet work

Course Outline

Acquiring Data

- Start with the end in mind - what data do you need access to?
- Different data types, their formats and their uses when creating reports and analysing data
- Acquiring and updating data from different data sources, including different File Types and Databases
- Validating and cleaning your data to ensure there are no duplicate records and that your data; is complete, accurate and correct - including using Pivot Tables to achieve this.

Organising Data

- Preparing your data in a user-friendly format - making it easy to create Pivot Tables, Pivot Charts and Dashboards
- Joining Data Sets
- Creating New Fields
- Calculated Fields – best practices, tips and things to be aware of
- Data Flags – identifying potential problem data or a specific condition in your data
- Adding Performance Target Data and or Thresholds
- Grouping, Sorting, Filtering, and Summarising Data
- Performing Data Reconciliations
- Adding New Data

Creating Pivot Tables, Pivot Charts and Dashboards

- Create your first Pivot Table and Pivot Chart
  - Pivot Tables vs. using SUMIFS & COUNTIFS – the benefits and downsides
  - Adding Fields – Filters, Rows (Axis Categories), Columns (Series) and Values
  - Filtering, Sorting (incl. custom sorting), Grouping (including custom grouping), Expanding and Collapsing Fields
  - Changing Field Names
  - Value Summary Options (Sum, Count, Average, Max, Min and StdDev)

- Formatting Values
- Showing Values as a; % of Totals, % Difference From, Running Total or % Running
- Formatting and Layout Options
  - Pivot Table Options – auto resizing and handling errors
  - Styles, Layouts, including Sub Total and Grand Total options
  - Conditional Formatting
- Adding Calculated Fields and Items
- Adding Slicers and Timelines – including linking to multiple tables and charts
- Moving and Copying Pivot Tables and Charts
- Creating Dashboards using Pivot Tables and Charts
- Refreshing and Updating Source Data (including Automating Refresh)
- Tips, Tricks and what to watch out for when using Pivot Tables and Charts
- Present Charts in PowerPoint

Analysing Data

- What is the difference between Reporting on and Analysing Data?
- Summarising Performance using Descriptive Statistics (Sum, Count, Min, Max, Mean, Median, Standard Deviation) and why is this useful
- Using the appropriate visualisation for the insight you require:
  - Identify trends and patterns in your performance
  - Compare performance
  - Identify deviations/variances from expected performance
  - Evaluate percentage contributions to performance
  - Create and use distributions to evaluate performance
  - Rank performance
  - Identify relationships between different measures
  - Make performance forecasts

Excel Tools and Features covered in this course include:

- Excel Tables
- Excel Pivot Tables and Pivot Charts
- Excel Slicers and Timelines
- Get Data options
- Go to Special
- Data: Text to Columns, Remove Duplicates and Data Validation
- Conditional Formatting, including Identifying Duplicates and Conditional Formats on Pivot Tables
- SUM, COUNT, AVERAGE, MAX, MIN, STDEV, SUMIFS, COUNTIFS, IF, AND, OR, VLOOKUP, INDEX, MATCH, XLOOKUP, IFERROR, GETPIVOTDATA, DATE Functions
- Nested Functions
- Linking to PowerPoint

Course Delivery

Starting time   : 08h30
Mid-morning break : 10h00 – 10h15
Lunch   : 12h00 pm – 12h45
Mid-afternoon break: 14h30– 14h45
 Knock off : 16h00

Delivery Method:

On-site & Virtual

The programme is facilitated by a competent subject matter specialist/s, which utilises the following techniques to ensure that the session is practical and experiential: Discussion; Role Plays; Exercises & Case Studies; Simulation; and learner assessment.

Assessment and Certification
Formal Assessment:
Each learner will be provided with an assessment guide on the last day of the programme in which a range of assessment methods and tools will be used to assess the competence level of each individual learner.

Feedback:
Learners will receive comprehensive, detailed and accurate feedback on assessment.

Certification:
When the learner is found to be competent in the specific field of knowledge a certificate will be is- sued.

Language of delivery:

English

MS Excel Reporting, Data Analysis & Dashboards
5 Days
In-house or Open Course

COMPANY DETAIL

Company Name:………………………………………Country……………………………………….Cell…………………………………………….

Postal Address…………………………………………………………………………………Postal Code……………………………………………….

Tel Number……………………………………………………Fax Number……………………………………………………………………………….

Nature of Business………

NOMINEES

1. Name:………………………………………………Surname:…………………………………………Position………………………………

2. Name:………………………………………………Surname:…………………………………………Position………………………………

3. Name:………………………………………………Surname:…………………………………………Position………………………………

4. Name:………………………………………………Surname:…………………………………………Position………………………………

(For more Delegates Please Photocopy)

ORGANISATION APPROVAL

Approving Manager Name:

Title: Organization:

Telephone   Fax   e-mail

Signature :   (This booking is invalid without a signature)

DELEGATE FEE: 9 500.00 – Fees includes course documentation, Facilitation, assessments & Certificates on completion of Course. An additional cost of R2 000 for laptop hire

PAYMENT METHODS

Bank Transfer payments to be made payable to: **Prospect Plus (Pty) Ltd, NedBank, Account Number: 1171790759, Branch Code: 19130500**

please Email this form and proof of Payment to andries@prospectplus.co.za

TERMS AND CONDITIONS

CANCELLATIONS: By completing this registration form, the client hereby agrees that Prospect Plus will not be able to mitigate its losses for any less than 50% of the total contract value. Cancellations must be received in writing seven days prior to the event. Only cancellation made in writing and addressed for the attention of the Chief Financial Officer will be recognized by Prospect Plus. Cash alternatives will not be offered although delegate substitutions are welcome any time. Hereafter, the full workshop fee is payable.

If for any reason Prospect Plus decide to amend this workshop, we are not responsible for covering airfare, hotel or other costs incurred by registrants. In the event that I Prospect Plus cancel the event, Prospect Plus reserves the right to transfer this booking to another workshop to be held in the following six months, or to provide a credit of an equivalent amount to another workshop in the same sector within the following six months.

INDEMNITY: Should for any reason outside the control of Prospect Plus, the venue or speakers change, or the event be cancelled due to act of terrorism, extreme weather conditions, industrial action Prospect Plus shall Endeavor to reschedule but the client hereby indemnifies and Prospect Plus holds harmless from any costs, damages, and expenses including attorney fees, which are incurred by the client. The construction validity and performance of this Agreement shall be governed in all aspects by the laws of Republic of South Africa to the exclusive jurisdiction of whose course the parties hereby agree to submit.

PAYMENTS ARE REQUIRED WITHIN 7 DAYS OF INVOICE.