informatech

ACCOUNTING AND FINANCE | COURSE

Certificate in Business Reporting Using Excel

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Course content

Why Attend

The fact is that Excel is the accountant's, finance and business professional's best friend. Companies everywhere are overwhelmed by the abundance of unstructured and unclean data. Monthly, quarterly and annual closings 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 is an Excel-based course that will help you develop an exclusive level of expertise that adds immediate value to your job and company.

20% of the course is 'design and structure' focused while 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 a daily basis.

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

• Apply Excel reporting expertise in business, finance, and accounting by enhancing data slicing and dicing, data massaging, and data analysis skills

• Use pivot tables and pivot charts to perform automated report writing, analysis and reconciliation most efficiently

• Develop special flash and management reports by linking-up Excel with Access, web, text, SQL, and other databases

• Repeat tasks and generate reports efficiently by recording, running and editing macros

• Acquire numerous tips and tricks that will improve working efficiency

Business, finance and accounting professionals, senior and junior accountants, business analysts, research professionals, marketing and sales professionals, 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.

• Reporting, analysis, and reconciliation

• Data modeling

• Integration with external data sources

Course content

Why Attend

• Automation and macros

• Massaging of unstructured and noisy data

This is a hands-on training course using laptops, which will be made available by Meirc for the duration of the course. 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

Data massaging: tools and techniques

• Consolidating data from separate files and sheets

• Advanced data validation using lists, dates and custom validation

• Cell management tools: left, right, mid, concatenate, value

• Naming, editing, and managing cells and ranges

• Subtotal, Sumif, Sumifs, Sumproduct, Count, Countif, Countifs

• Looking-up data, texts, and values using Vlookup

• The incredible table-tools technique

• Slicing dates into day names, weeks, week numbers, month names, years and quarters

• Text to columns and dynamic trimming using Trim, Len

• Managing texts and numbers using replace, find, and substitute

• Text change functions

Reporting, analysis and reconciliations using pivot tables

• The 20 must learn rules

• Creating pivot tables

Course content

Course outline

- 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 and % of
- Pivot table options
- Drill down option
- Showing report filter pages
- Inserting formulas
- Date analysis
- Copying pivot tables
- Creating pivot charts
- Dynamic chart labeling
- Mastering the slicer
- Linking pivot tables and pivot graphs with PowerPoint
- Conditional formatting with pivot tables
- Designing reports using GetPivotData

Modeling and integration techniques

- Perform 'what-if' analysis using spinner
- Check box data modeling with 'if' function

Course content

Course outline

- Option button data modeling with 'if' function
- List box data modeling with 'Choose' function
- Linking Excel with text files
- Linking Excel with databases (Access)
- Linking Excel with multiple Excel files and SQL
- Linking Excel with internet
- Linking Excel with Excel
- Scenario manager

Introduction to learning the ultimate tool in Excel: ''Macros''

- Macro basics
- Planning a macro
- Designing your control board
- Recording macro
- Testing macro
- Editing macro
- Macro workshops
- Advanced filter with macro

Tips and tricks in Excel

- Data entry form
- Custom list
- Camera tool
- Text to speech

Course content

Course outline

• Protecting worksheets and workbooks

Seminar dates

Available seminar dates

Live dates and pricing for Certificate in Business Reporting Using Excel generated from the course details page.

Date	Location	Format	Fee
7 - 11 September 2026	Paris - France	Classroom	**€3,600.-**
12 - 16 October 2026	Frankfurt - Germany	Classroom	**€2,600.-**
9 - 13 November 2026	Barcelona - Spain	Classroom	**€3,080.-**
14 - 18 December 2026	Barcelona - Spain	Classroom	**€3,080.-**
18 - 22 January 2027	Istanbul - Turkey	Classroom	**€2,280.-**
15 - 19 February 2027	Vienna - Austria	Classroom	**€3,400.-**
15 - 19 March 2027	Barcelona - Spain	Classroom	**€3,080.-**
19 - 23 April 2027	Paris - France	Classroom	**€3,600.-**
17 - 21 May 2027	Frankfurt - Germany	Classroom	**€2,600.-**
21 - 25 June 2027	Barcelona - Spain	Classroom	**€3,080.-**
19 - 23 July 2027	Barcelona - Spain	Classroom	**€3,080.-**
16 - 20 August 2027	Istanbul - Turkey	Classroom	**€2,280.-**
20 - 24 September 2027	Vienna - Austria	Classroom	**€3,400.-**
18 - 22 October 2027	Barcelona - Spain	Classroom	**€3,080.-**
15 - 19 November 2027	Paris - France	Classroom	**€3,600.-**
20 - 24 December 2027	Frankfurt - Germany	Classroom	**€2,600.-**