Octara

Training | Conferences | Events | Publications

Advanced Business and Financial Reporting Using Excel 2010

September 17 & 18, 2013 - Sheraton Hotel & Towers, Karachi
September 24 & 25, 2013 - Pearl Continental Hotel, Lahore
9:00 am to 5:00 pm

Course Coverage:

Extract, Transform, Load (ETL) Process

Financial Forecasting using Excel

Data Crunching with Pivot Tables

Creating Advanced Dashboards & Scorecards

Advanced Report Development

The Next Generation of PivotTable-PowerPivot

Automating the Modeling and Reporting (Excel VBA Macro)

BONUS LEARNING - Extend Excel with Third Party Tools

...only from Octara!!!

For Details & Registration:
Tel: 021-34534261, 021-34536315, Fax: 021-34520708
E-mail: register@octara.com | **www.octara.com**

Course Facilitator:
Nooruddin Surani, CISA

Microsoft CERTIFIED *Technology Specialist*

Microsoft CERTIFIED *Trainer*

Project Management (2008)

Microsoft Certified Trainer

Certified Information Systems Auditor (CISA)

Microsoft Excel 2010 Certified Application Specialist

Microsoft Office 2007 Master Program Certified

Over 16 years hands on application development experience

Chief Operating Officer, Viftech Solutions (Pvt.) Ltd.

Course Facilitator:
Nooruddin Surani, CISA

- ▶ Microsoft Certified Trainer
- ▶ Certified Information Systems Auditor (CISA)
- ▶ Microsoft Excel 2010 Certified Application Specialist
- ▶ Microsoft Office 2007 Master Program Certified
- ▶ Over 16 years hands on application development experience
- ▶ Chief Operating Officer, Viftech Solutions (Pvt.) Ltd.

Nooruddin Surani, CISA, is an MBA in MIS, a Microsoft Certified Trainer, Microsoft Certified Technology Specialist for Managing Projects with Microsoft Project 2010 and Brainbench Certified for Project Management 2008. His vibrant personality combined with a unique blend of content and delivery makes the participants' experience both educating and entertaining.

Surani has been associated with the application of Information Technology for more than 18 years and is actively involved in training and teaching as a visiting faculty with multiple reputable institutes. He is considered amongst the new breed of dynamic "IT Trainers", and can perfectly blend his experience with his teachings.

Surani's unique experience of working with the corporate sector includes software project management and designing & development of software solutions for medium to large sized industries, retail business management, educational, financial and banking institutions. He is being engaged in software projects for leading organizations like "Standard Chartered Bank" to NGOs like "Aga Khan Education Services, Pakistan" and for global firms like "AIU Holdings Inc. (USA)" and "Awesome Technologies Inc. (USA)", etc., Software projects developed under his supervision are being used in US, UK, Australia, Sweden & Pakistan.

Surani is thoroughly able to inspire and encourage those around him through his unique training style which enables maximum learning & retention in least possible time. Besides being an ardent trainer, Surani also has to his credit several articles published in multiple IT related publications.

Currently, he is working as the Chief Operating Officer at Viftech Solutions (Pvt.) Ltd., a software & information technology solution provider. Driven by a mission in life, Surani aims to provide better understanding to his participants enabling them to focus better and achieve the results they seek.

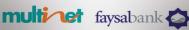### Here's what past participants have said about the course

The training was extremely helpful and enhanced my skills to a great level. This session should be continued again for a refresher to help us out in our daily process.
Telenor Pakistan

The session was very well conducted. Trainer was very well equipped with required skills, training has added a lot to my skills.
Coca Cola Beverages Pakistan Limited

Attitude and approach of the facilitator was Excellent, he had thorough knowledge about the topic and I had a very good experience. I want to learn as many topics as I can from the same facilitator in future.
HSBC

Nooruddin has trained participants from

engro foods • NOKIA Connecting People • PARCO • National FOODS • ICI • Coca-Cola • JS BANK • FAYSAL BANK • AkzoNobel • Standard Chartered • FundManagers • UBL • HBL • Pakistan Petroleum Limited • TCS Express & Logistics • Johnson & Johnson • engro polymer & chemicals • HSBC • pepsi • PharmEvo • MCB • ZONG Say it all • TOYOTA • BAYER Bayer CropScience • NIB Bank • citibank • UBL • Halcrow • Pfizer • AlliedBank • telenor • HINO • SILKBANK Yes we can • multinet • faysalbank

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Advanced Business and Financial Reporting Using Excel 2010

September 17 & 18, 2013 - Sheraton Hotel, Karachi
September 24 & 25, 2013 - PC Hotel, Lahore

Course **Overview:**

Since the inception of the first spreadsheet program VisiCalc in early 1980s, spreadsheets are the de-facto language of financial and business reporting. This course will impart knowledge about creating professional business and financial reports. It generates faster and more accurate reports which are aesthetically distinguished. This program will maximize the benefits for those participants who have intermediate level Excel skills and are using Excel on a daily basis.

Learning **Outcomes:**

✓ **Understand** important functions and features of Microsoft Excel, for creating Business and Financial Reports

✓ **Perform** reconciliation and data cleansing / transformation operations on spreadsheets

✓ **Apply** risk management for effective decision making using What-if-analysis

✓ **Use** advanced Microsoft Excel's option to link with external database like Access, Text, Oracle and SQL based databases

✓ **Use** Excel's option to summarize and consolidate data from different sheets

✓ **Understand** the lifecycle for creating Dashboard and Business Models

✓ **Ensure** the integrity of reports using security and sharing features of Microsoft Excel

Who **Should Attend?**

Middle to Senior Level Business Professionals using Excel on daily basis, Business Managers, Project Managers, Research Professionals, Accounts & Finance Managers, Financial Controllers, Financial Analysts, Budget & Forecast Managers, and for Business Professionals who wants to learn latest techniques to create robust reports with efficiency.

BONUS LEARNING
Extend Excel with Third Party Tools

- • Perform tasks in seconds which takes hours otherwise
- • Edit/Calculate worksheets faster with precision
- • Combine data from hundreds of workbooks / worksheets
- • Take the Excel Consolidation to the next level
- • Create / Remove tens of Worksheets in couple of clicks
- • Make Print Jobs Easier

Extract, Transform, Load (ETL) Process
- ▶ Auditing Workbooks
- ▶ Data Cleansing Tricks
- ▶ Excel's Date Mechanics Converting / Correcting Dates
- ▶ Working with Text (Splitting / Concatenating Data)
- ▶ Filling Empty Cells
- ▶ Data Conversion in Excel

Financial Forecasting using Excel:
- ▶ Common Size FS Analysis (Horizontal / Vertical Analysis)
- ▶ Comparing Financial Statements
- ▶ Static / Dynamic Consolidation of Financial Statements
- ▶ Understanding Input, Process and Outputs
- ▶ Creating 5 Years Forecasted Financial Statements
- ▶ Creating Customer and Vendor Analysis Reports
- ▶ Creating Budget Models
- ▶ Two Dimensional Sensitivity Analysis
- ▶ Formatting Financial Reports

Data Crunching with Pivot Tables:
- ▶ Introduction to PivotTables
- ▶ Customizing Pivot Table
- ▶ Grouping, Sorting and Filtering PivotTables
- ▶ Built-in and Customize Calculation within PivotTables
- ▶ Creating Pivot Charts
- ▶ Using GetPivotData

Creating Advanced Dashboards & Scorecards:
- ▶ Introduction to Dashboards & Scorecards
- ▶ Designing Static
- ▶ Dynamic Charting
- ▶ Creating Dynamic Dashboard
  - • 3 Ways to Dynamically updating Dashboard in one Click
- ▶ Building Scorecards

Advanced Report Development:
- ▶ Understanding "Get External Data" Feature
- ▶ Connecting to Flat Files TXT, CSV and Tab Delimited
- ▶ Connecting to Databases Access, SQL
- ▶ Using MS-Query for extracting dynamic data
- ▶ Configuring and managing External Data
- ▶ Preparing your Data for Online Analytical Processing
- ▶ Building Excel Based Reporting Solution

The Next Generation of PivotTable – PowerPivot:
- ▶ Self-Service BI & PowerPivot
- ▶ Importing, Connecting and Getting Data from External Sources
- ▶ Understanding Relationship and DAX
- ▶ Self-Service Analysis & Reporting

Automating the Modeling and Reporting (Excel VBA Macro):
- ▶ Introduction to Excel Macros
- ▶ Using Visual Basic Editor
- ▶ Working with Operators
- ▶ Working with Conditions (If, Else if, Else or Select Case)
- ▶ Looping constructs
- ▶ Working with Cell, Column, Row, Range, Worksheet and Workbook
- ▶ Building Navigation Buttons for your Model
- ▶ Automating your repetitive tasks

Octara Events

Workshop Investment

PKR 29,990/-
(Fee per participant)

Fee includes classroom & online sessions, course material, Octara certificate, lunch, refreshments, and business networking

Note: Participants are required to bring laptops for hands-on exercises
Additional fee of PKR 1500 per day will be charged in case Laptop is to be arranged by organizers

5 Easy Ways to Register
Phone   : **021-34534261, 021-34520092**
Fax   : **021-34520708**
E-mail   : **register@octara.com**
Address : **Octara Private Limited**
             1/E-37, Block-6,P.E.C.H.S., Karachi.
Web   : **www.octara.com**

Payment:
A confirmation letter/e-mail and invoice will be sent upon receipt of your registration.
Note: Full payment must be received in advance to confirm enrollment.

Send your cheque in favor of "Octara Private Limited"

To: Muhammad Imran Anwer
Octara Private Limited
1/E-37, Block-6, P.E.C.H.S., Karachi.
Tel: 021-34534261, 021-34536315, Cell: 0321-2670041

Bring **Advanced Business and Financial Reporting Using Excel 2010** In-house
This workshop can be customized to suit specific needs of your organization at significant savings. Please contact **Jason D'souza** at **jason.bosco@octara.com** or call at **0332-2422732** for more details

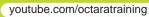Connect with Octara on social networks:

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Strategic Partners

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BRAND HOTLINE | Ruskin Brown Associates | Gulfstone Leadership Training | avayo | VoiceCOACH

Logistics Partner TCS Express & Logistics | Partner Culligan

SERVICE Through TEAM Excellence
Ramiz Allawala
August 19, 2013 - KHI | August 21, 2013 - LHE

Time Management & Stress Control
Dr. S. A. Rab
August 20, 2013 - KHI | August 27, 2013 - LHE

Financial Analysis & Presentation
Ali Saeed
Aug 23 & 24, 2013 - LHE | Aug 26 & 27, 2013 - KHI

Advanced Negotiation Skills
Ramiz Allwala
August 20, 2013 - KHI | August 22, 2013 - LHE

Problem Solving & Decision Making
Ramiz Allwala
September 20 - LHE | September 24 - KHI

Supervisory Toolkit
Hassan Bin Rizwan
Sept 20 & 21, 2013 - KHI | Oct 11 & 12, 2013 - LHE

Mastering the Art of Business Communication
Karen S. Allawala
Sept 10 & 11, 2013 - KHI | Sept 17 & 18, 2013 - LHE

Sales Masterclass
Dr. S. A. Rab

Course I: **Excellence in Sales**
Sept 17, 2013 - KHI | Sept 20, 2013 - LHE

Course II: **Sales Force Management**
Sept 18, 2013 - KHI | Sept 21, 2013 - LHE

Certified Customer Service Representative (CCSR)
Irfan Hafeez
September 27 & 28, 2013 - KHI

Sustainable Supply Chain
Mike Badwi
Oct 2 & 3, 2013 - LHE | Oct 4 & 5, 2013 - KHI