

Improving Data Analyses in Excel

www.exbase.de/excel

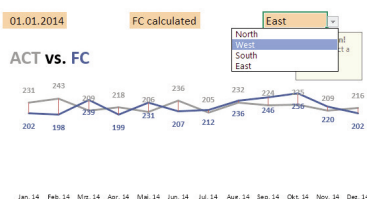
With our Inhouse Trainings we support companies in developing more efficient and comprehensive reports. The trainings are very praxis-orientated and can include company-specific data and challenges. If you're interested, we will draft a detailed agenda according to your preferences.

This flyer provides three suggestions for Inhouse Trainings, of which one is described in more detail:

Training 1: Controlling with Excel

Most people have gained their Excel knowledge by the concept "Trial and Error", which is why the functions used are often more complex than necessary. This course mediates Best Practices in Excel from import to report. It provides many examples that show potentials for optimization and offers fresh ideas and valid methods to handle data analyses in a more transparent and time-efficient way.

- Tips & tricks to master Excel more time-efficiently
- Best Practices for controllers displayed on case studies
- Data quality assessment and functions to prepare data for the analyses
- Advanced techniques in pivottables
- Linking, comparing and analysing data over several worksheets



Trend

Jan. 15	Feb. 15	März. 15	Apr. 15	Mai. 15	Jun. 15
214,8	213,8	212,9	212,0	211,0	210,0

Häufigkeitsverteilung Auftragsvolumen

Klassen	North	West	South	East
bis 200	0	0	1	0
bis 220	15	19	20	16
bis 240	18	13	11	16
bis 260	3	4	4	4

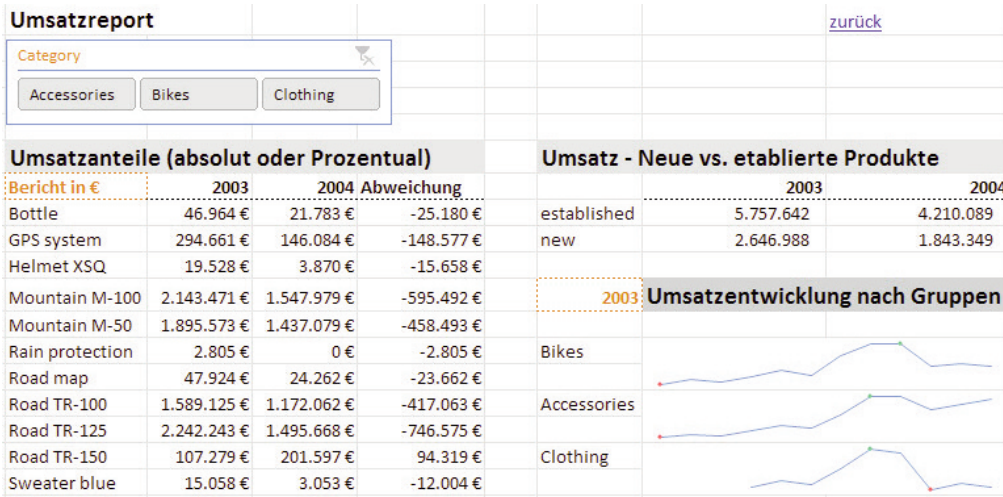
Top-5

North	West	South	East
246	246	250	248
242	245	248	245
241	243	244	243
240	242	241	241

Training 2: Dynamic Reports and Dashboards

Recurring reports, in which only the underlying data is replaced or supplemented, should create as little work as possible. With dynamic reports you can reduce the time spent on these tasks considerably. In this training you learn how to automatise reports via functions and control panels (not VBA) and how to create convincing dashboards.

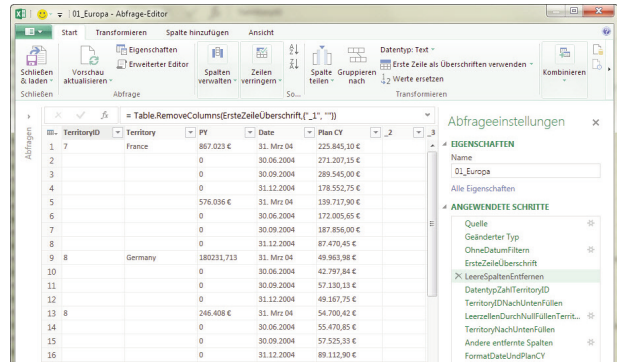
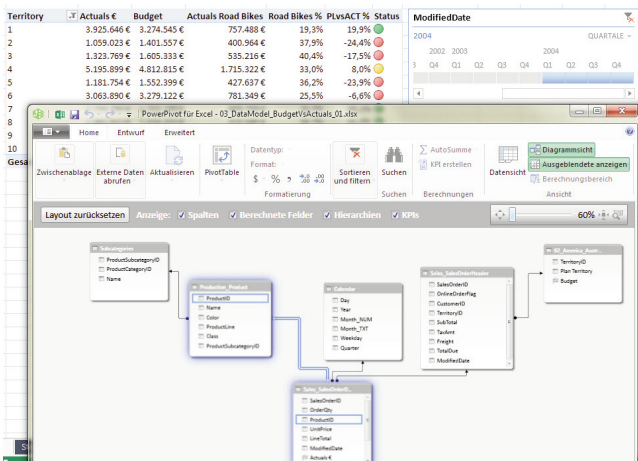
- Developing data models for multivariate analyses
- Important functions for dynamic reports and working with control panels
- Requirements for the development of convincing dashboards
- Application of sparklines, small multiples and bullet graphs



Training 3: Excel Power BI and Data Modelling (PowerQuery and PowerPivot)

The preparation of raw data for reports usually requires a lot of time. In this training you learn to use time-saving PowerQuery-Functions to import raw data from various sources and to prepare it for further analyses. Then you create data models and dashboards with PowerPivot and apply new DAX-functions that facilitate your work tremendously.

- Automated data import and data cleansing
- Basic and advanced techniques in PowerPivot-Tables
- Building logical data relationships instead of lookup formulas
- Optimising data models with DAX-Functions
- Creating dynamic and multivariate financial diagrams and dashboards



Excel Power BI and Data Modelling

Application of PowerQuery and PowerPivot

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With Excel Power BI you can update your data analyses to the next level.

Key-Topics of the Workshop

- Automated Data Import and Data Cleansing
- Basic and Advanced Technics in PowerPivot-Tables
- Building Logical Data Relationships Instead of Lookup Formulas
- Optimising Data Models with DAX-Functions
- Creating Dynamic and Multivariate Financial Diagrams and Dashboards

This agenda was designed for Excel 2013 Professional Plus users. If your are working with Office 2016 or Office 365, we'll send you an adapted agenda on request.

By the way:

According to current Microsoft regulations PowerPivot can be used as an add-in for Excel 2010. PowerQuery works also in the Standard Version of Excel 2013 and in Excel 2010 Professional Plus with software assurance.

Your Excel-Expert



Stephan Nelles

Excel-Trainer and Developer of
Excel Power BI Tools

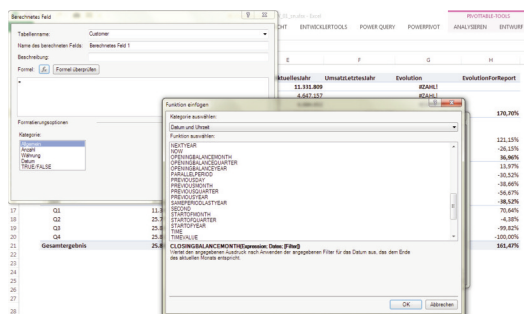
SECOND DAY

09.00

Time Intelligence with PowerPivot

A mighty instrument are the DAX-Functions of the category „Date and Time“, the so called Time Intelligence-Functions that are used to easily compare different periods of time:

- Introduction to Time Intelligence in PowerPivot
- Integration of calendars in data models
- Getting acquainted to default time and date formulas of the DAX library: DATEADD(), DATESBETWEEN(), TOTALYTD(), SAMEPERIODLASTYEAR(), CLOSINGBALANCEMONTH()



10.30 Coffee Break

11.00

Working with Individual Calendars

- Application of customised DAX formulas for data comparison in user defined calendar environments (comparing fiscal quarters, years etc.)
- Year-to-date and year-over-year calculation in PowerPivot

12.30 Lunch Break

13.30

Creating Multivariate Financial Dashboards

Due to changes of the data base, reports usually need to be adapted in order to display accurate results. In this part of the workshop you will learn how to create dynamic reports with PowerPivot and additional functions. These reports don't just adapt to data changes automatically, the content displayed can be controlled via slicers.

- Controlling PowerPivot tables and charts with slicers and timelines
- Visualising KPI's with conditional formatting (traffic lights, icon sets etc.)
- Integration of cube functions in dashboards and reports

15.00 Coffee Break

15.30

Questions and Company-Specific Challenges

This part of the seminar is for topics und questions that come up in the planning process and during the workshop. Alternatively, we could give an introduction to „Power BI Desktop“, an app by Microsoft that was designed to easily visualise data in various diagrams.

17.00 End of the Workshop

YOUR EXCEL-EXPERT



Stephan Nelles is a well known excel-trainer, consultant and developer of Self-BI-Tools. His area of expertise includes basic and advanced techniques to master data from import over data modelling to the presentation of results with dynamic reports and high-quality dashboards. Over the last 9 years Stephan Nelles trained a few thousand people at more than 500 booked training days. Moreover he is the author of the most-sold German Excel reference book „Excel 2013 im Controlling“.

COURSE MATERIAL

All participants get a handout with explanations and screenshots illustrating important workshop-topics as well as the excel-files. With the help of the course material participants should be able to recollect the workshop and design solutions of their own.

This workshop-proposal can be adapted according to your needs and supplemented by additional training-methods such as:

- E-Mail and Skype-Support
- Exercises for Training
- Webinars and training videos
- Consulting services in the development of solutions

FEEDBACK FOR OUR SEMINARS

„Very useful seminar concerning the operation and presentation of mass data.“ *Uwe Albiel, Head of Financial Controlling, Hoist GmbH (PowerPivot)*

„Highly recommendable! In short time, I learned many new things with a high practical relevance.“ *Sandra Mäusli, Project Easton Finance, Credit Suisse (PowerPivot)*

„If you are working with Excel, you should have attended this course.“ *Oscar Paradela, Leiter Controlling/IT, Europcar AMAG Services AG (New Tools for Data Analyses in Excel 2013/16)*

CONTACT AND FURTHER INFORMATION

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Since our website is (so far) only in German, we can offer you to create individual agendas like this one on request.

EXPERIENCE AS EXCEL-TRAINER

Stephan Nelles developed quite a number of seminars and held over 500 training days over the last 9 years, of which 113 were individually tailored for companies, 57 were concerned with the application of the Power-BI-Tools PowerPivot and PowerQuery. Detailed brochures of his current seminars you'll find on our website under www.exbase.de/excel.

For Coca-Cola Stephan Nelles trained employees at several European locations. The training is now web-based and consists of 50 Office-modules. Employees worldwide participate in the webinars. As a member of the global QMP-Team he is responsible for the reporting of quality data. Besides Coca-Cola Stephan Nelles held inhouse-seminars for Merck, Seat, Knorr Bremse and Siemens. The feedback we get from companies and participants of the seminars is very positive. More information you'll find in the category „Stephan Nelles“ on our website.

EXPERIENCE AS DEVELOPER OF EXCEL TOOLS AND POWER-BI SOLUTIONS

QMP Reporting Tool

BI solution based on PowerQuery and PowerPivot. The tool has been developed for Coca-Cola and is used in all European markets. Uses PowerQuery and PowerPivot to consolidate data from 3 data sources (Business Objects reports and databases). Reproduces a business model to calculate and follow-up on drink quality and maintenance of equipment in McDonald's restaurants worldwide. Became global standard as data analysis and reporting tool/dashboard in December 2015.

Conversion Dashboard

Dynamic dashboard that shows various KPI's to analyse conversion in a sales funnel from webpage visit to test drive and offer. Dashboard allows selection of various carlines, time ranges and contains a highly variable forecast which reflects pre-defined time range but also manual data entry. Recommended by SEAT Europe as best practice solution in December 2015. Further development in December 2015 as weekly dashboard.

Project Controlling Desktop

Project controlling tool and dashboard that analysis project hours and all project costs and focusses on various KPI like project yield, cost to complete, budget versus actuals on a classical one pager. Tracks the financial return of project at all stages from offer to PO to change request and project completion. Developed with PowerPivot.

Working Hours Analysis Tool

A dynamic analysis tool developed for the work council of Coca-Cola Germany. Based on PowerQuery and PowerPivot. Consolidates all time sheets and delivers results in a dynamic dashboard. Access to the tool via SharePoint.

TC Cost Controlling Tool

SharePoint-based BI-Tool to analyse telecommunications costs. Based on PowerQuery and PowerPivot.

More projects and screenshots you'll find under the following link: www.exbase.de/excel/start/referenzen

AUTHOR OF SPECIALISED BOOKS

Excel 2013 im Controlling

Enhancement of the previous edition „Excel 2010 im Controlling“. Reflects especially Excel 2013 ability to develop data models and self-BI solutions with PowerPivot. Introduces the new DAX formulas and dashboard tools like slicers and KPI.

Excel 2016 im Controlling

The new edition of this Excel controlling classic is dedicated to Excel 2016 new capabilities. As there are: PowerPivot and PowerQuery integration, new dashboard and charting options in Excel and the Power BI Desktop.

