



Your data has the potential to help you increase sales, zoom profits, reduce leakages, identify non-compliances with laws & internal policies and evaluate controls. Wish to learn how? **Register NOW!!**

Data Analytics & Dashboard Reporting With Pivot Tables & Pivot Charts Workshop by CA Nikunj Shah

“Over 60% of Excel users leave over 80% of pivot tables untouched!!”

Workshop Objective

To demonstrate how managers & team-members can use:

1. Advance data analysis & reporting techniques in Pivot Tables to achieve business / audit objectives.
2. Excel Dashboards for interactive real-time visualization of quantitative information.

Workshop deliverables

On completion of workshop you shall learn:

❖ How Pivot table can be used to:

- ✓ Summarise data exceeding one million rows!!
- ✓ Get Kaleidoscopic views by slicing and dicing data
- ✓ Use Pareto analysis (80-20 rule) to identify high value (and high risk) transactions
- ✓ Quickly perform a ‘Time Dimension’ analysis on data
- ✓ Detect non-compliance with organizational policies & compliance frame work.
- ✓ Identify revenue leakages, double payments, etc.
- ✓ Learn to interpret results of analysis and apply it in strategy and business decision making

❖ Dashboards concepts (including applications) like:

- ✓ Important questions to ask, before you start working on a dashboard
- ✓ How to organize your data in three layers, so it's flexible, and the dashboard can be easily changed.
- ✓ Tips on good & bad design, where to find more resources
- ✓ Which chart types work best for different data types
- ✓ How to create interactive charts, to give users some control over the content (without macros)
- ✓ How to use pivot tables with a dashboard
- ✓ Tips for distributing and protecting your dashboard.

Workshop Key Information:

Mumbai:	Batch 1: 29 th April
	Batch 2: 06 th May
Ahmedabad:	Batch 1: 30 th April
	Batch 2: 07 th May
Surat:	13 th May
Pune:	20 th May

Time - 01:00 pm to 06:00 pm

Who should attend?

1. Managers and Executives (from all line of businesses) in Accounting, MIS, Production, Marketing, Sales, Procurement, Financial controllers/Finance staff, Project managers, Commercial bankers, Business & Financial analysts, etc.
2. Chartered Accountants, managers, team members & articled trainees in audit / attest function.
3. Internal auditors & Information Systems auditors
4. Team members who report to managers or key decision makers.

DAFI

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www.dafi.in**

Data Analytics & Dashboard Reporting With Pivot Tables & Pivot Charts

Indicative content

Session #1 – Data Analytics and multi-dimensional analysis using Pivot tables.

Duration: 2hrs.

Pivot tables functionalities / Topics covered:

- † Understanding the Pivot Table anatomy, dragging and dropping fields, etc.
- † Quickly re-arranging data items in row / column
- † Adding, removing, getting multiple subtotals in Pivot
- † Get a running total (e.g. running balance of a bank account) in Pivot report
- † View amounts / quantities as % of rows / columns
- † Show / hide certain / multiple row items / page fields
- † Sort data in Pivot
- † Produce Top 3 or Top 10 reports
- † Quickly group dates by Weeks, months, quarters, etc.
- † Group Numeric fields to apply the 80-20 principal
- † Create, at a click, separate pivots for each item in a page field
- † Perform calculations within pivot tables
- † Auto-include additional rows / columns in pivot report
- † Efficiently analyse large data sets (even more than a million rows)
- † Using slicers and timelines - Connecting multiple pivots to a single filter
- † Managing file size - Have 100's of pivots (based on thousands of rows of data) in a single file and still keeping the file-size less than 1 MB!!

Session #2 – Excel Dashboard reporting.

Duration: 2hrs.

Dashboard topics covered:

- † Introduction to Dashboards
- † Getting Your Data Ready
- † Design Principles
- † Display Principles
- † Building Dashboards - Interactive Controls
- † Analysing the Data
- † Automating Your Dashboard
- † Case Studies
- † Distributing your Dashboard

Workshop Methodology

Step-by-step demonstration of advance techniques of data analysis & reporting with Pivot Tables and Dashboard designing on real world (realistic) data files with brief lectures & brain storming sessions.

Workshop Fees

- **RS. 2000/-** per participant

- **EARLY BIRD OFFER Registrations before 1st April, 2016**
- **RS. 1750/-** per participant
- **RS. 1500/-** per participant for 3 or more participants from same organization

- **Special Group Discount**
- **RS. 1750/-** per participant for 3 or more participants from same organization.
- **RS. 1500/-** per participant for 6 or more participants from same organization.

Note: Workshop Fees inclusive of -

1. Course Material – Data files & solutions.
2. Tea, coffee & snacks.

Commitment Policy

We are committed to your success. It is our policy that every organization / individual who has ever been trained at one of our training programs is entitled to a **FREE life-time email support** for ideas / trouble shooting. NO Conditions apply!!

Data Analytics & Dashboard Reporting With Pivot Tables & Pivot Charts

Trainer's Profile –

Mr. Nikunj S. Shah is a graduate in Commerce and in Law from Mumbai University. He is a qualified Chartered Accountant. He holds a post-qualification certification in Information Systems Audit. He is also a Certified Internal Auditor, a credential given by the Institute of Internal Auditors (USA). He is also an associate member of the Association of Certified Fraud Examiners (USA).

He is a partner with Shashikant J. Shah & Co., Chartered Accountants and practices mostly in the areas of Business & Assurance Analytics, Internal Audit, Information Systems Audit, Fraud Detection and Forensic Accounting.

He has been a Faculty / Group leader at more than 500 Conferences / Seminars / Workshops / Study Circles, including at:

- a. Several corporate like Godrej & Boyce Mfg. Co. Ltd., Knight Frank India, Saurashtra Cements, Kotak Mahindra Bank, Trent Ltd. (a Tata group company), Reliance Communications, etc., where he has trained participants on using advance features of Excel for data, decision making and business modeling.
- b. Bombay Chartered Accountants' Society (BCAS) and Western India Regional Council (WIRC) of the Institute of Chartered Accountants of India (ICAI) on 'Using Excel for Audit'.
- c. Academic Staff College, University of Mumbai Lecture on "Assurance Analytics".
- d. Certificate Course on Forensic Accounting and Fraud Detection using IT and CAATTs by the ICAI on "Data Mining - Investigative Auditing using CAATTs"
- e. Revision lectures for final C.A. students on the subject 'Information Systems – Control & Audit' conducted jointly by BCAS & WIRC.

He is contributor to the publication "Study on Unconventional Methods in Special Audits and Investigations" published by the research committee of the Institute of Chartered Accountants of India the basic draft of which is prepared by CA Chetan Dalal. He is contributor to the BCAS and WIRC Referencer on "MS Excel".

He was the Co-Convener of the Information Technology Committee of Bombay Chartered Accountants' Society.

Other Interests:

1. He reads Philosophy, does Gardening and has taken active part in Dramatics at College and Inter-College levels.
2. He holds a M.A. (Masters in Arts) degree in Political Science from Mumbai University.



Nikunj S. Shah

B.Com., LL.B., FCA., DISA, CIA, ACFE, M.A.

Testimonials –

"I think trainer has got his purpose. To accommodate his knowledge / expertise in the mind of trainees!!"

Mr. Sanjay Sharma, Statutory Audit
 M/s. Chaturvedi & Shah (CA Firm)
 Date: 6th & 7th Jan '2015

"Mr. Nikunj's training is excellent as usual."
 Mr. Manish Sanghai, GM Finance
 Thermofisher Scientific (India) Pvt. Ltd.
 Date: 23rd April'2014.

"Excellent communication and simple - Lucid way to present the topic effectively."
 Mr. Kamlesh Joshi, D.G.M. (Fin. & Acc.)
 Supreme Industries Ltd.
 Date: 16th & 17th May '2013

"Trainer was thorough expert in the subject and was able to give in depth explanation on any area of Excel."
 Ms. Trina Das, Sr. Manager –HR
 Reliance Infrastructure Ltd.
 Date: 16th & 17th Feb'2012.

"All modules covered were effective, were properly explained."
 Mr. Sunil Kumar, V.P. - Internal Audit
 Reilance Communications
 Date: 14th & 15th Dec'2010.

"Extremely knowledgeable about the subject. The amount of hours that he must have spent on researching and experimenting can only be imagined."
 Mr. Vivek Savla, Exe. Director –
 Savla Foods and Cold Storage Pvt. Ltd.
 Date: 8th & 9th July '2010

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DELEGATE REGISTRATION FORM

Please tick (✓) DATE to select batch

PLACE	DATE	TIME	VENUE
Mumbai: Batch :1 Batch :2	<input type="checkbox"/> 29 th April <input type="checkbox"/> 06 th May	1.00 pm to 6.00 pm	Hotel Parle International, Next to Dinanath Mangeshkar Hall, Vile Parle -E Mumbai.
Ahmedabad: Batch:1 Batch:2	<input type="checkbox"/> 30 th April <input type="checkbox"/> 07 th May	1.00 pm to 6.00 pm	Parker Lords Eco Inn Vasant Baug Society, Gulbai Tekra Road, Ellis Bridge, Ahmedabad.
Surat	<input type="checkbox"/> 13 th May	1.00 pm to 6.00 pm	Hotel Lords Plaza Ring Road, Near Delhi Gate, Surat.
Pune	<input type="checkbox"/> 20 th May	1.00 pm to 6.00 pm	Hotel Ashish Plaza 1198, Shivaji Nagar, Fergusson College Road, Pune.

I / we would like to attend / nominate the following delegates:

S. N.	Name	Designation	Mobile	Email
1.				
2.				
3.				
4.				
5.				
6.				

WORKSHOP FEES

Workshop Fees	Less than 3 participants from same organization – <input type="checkbox"/> 2000/- per participant
Special Group Discount	3 or more participants from same organization – <input type="checkbox"/> 1750/- per participant
	6 or more participants from same organization – <input type="checkbox"/> 1500/- per participant

ORGANISATION DETAILS

Company:
 Address:
 Telephone Fax

By applying for registration, I /We agree to the “Terms and Conditions” mentioned below

PAYMENT METHODS:

1. ONLINE PAYMENTS

Bank Name & Address-Axis Bank, New Marine Lines, Mumbai :400020
 Beneficiary: DAFI | Bank Account Number: 91 20 20 00 59 62 334 |
 MICR Code: 40 02 11 026 | IFSC Code: UTIB 00 00 233

2. CHEQUE / DEMAND DRAFT

Pls. fill above form and send across along with cheque / demand draft favoring “DAFI” to following address
 Mr. Ketan Parmar @ DAFI - 104, Sharda Chambers, 15 New Marine lines, Churchgate. Mumbai 400020 | Call: +91 (22) 2201 75 63 | 8691 92 60 12 Email: dafi.caat@gmail.com | info@dafi.in

Note: Prior Registration is essential. Please courier/email the registration form at the earliest.

Pls. fill following details:

Cheque no.....

Dated

for:.....

Drawn on (Bank)

.....

in favour of “**DAFI**” being participation fee payable at Mumbai, is enclosed.



Terms and Conditions:

1. Payment Terms: Full payment is required along with filed and duly completed enrolment form PLEASE NOTE: Seat will be blocked / reserved only upon receipt of the conference fees. A receipt will be issued on payment, Due to limited conference space, we advise early registration to avoid disappointment. We reserve the right to refuse admission for any reason, including, but not limited to, non receipt of payment on time.
2. Cancellation /Substitution:
Substitution: Provided the total fee has been paid, substitution at no extra charge is allowed upto 2 days before the event. Substitutions between 2 days and the date of the event will be allowed subject to an administration fee of equal to 10% of the total fee that is to be transferred.
Cancellation: In the event of cancellation by the participant or participant's organization, the conference / training fee will not be refunded but can be credited to a future conference / event. Cancellation must be receive in writing by mail or fax 3 weeks before the conference is to be held in order to obtain a full credit for any future Dafi conference. Non payment or non-attendance does not constitute cancellation. If, for any reasons, Dafi decides to cancel or postponed this workshop, Dafi is not responsible for covering airfare, hotel, or other travel costs incurred by client.
3. Important note. While every reasonable effort will be made to adhere to the advertise package Dafi reserves the right to change event dates sites or location or omit event features, or merge the event with another event as it deems necessary without penalty and in such situation no refunds, part refund or alternative offers shall be due. In the event that Dafi permanently cancels the event for any reason whatsoever, (including but not limited to any force majeure occurrence) and provided that the event is not postponed to a later date nor merged with another event, the Client shall receive a credit note for the amount that the Client has paid to such permanently cancelled event valid for up to six months to be used at another Dafi event. No refund part refunds or alternative offers shall