



BUSINESS MODELLING

Data Analysis in **Excel**

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ABOUT APTA CONSULTING

APTA provides Financial Modelling, Petroleum Economics Evaluation & Analysis, and Excel training for business modelling and data analysis to range of clients. Ours is a small team of expert Petroleum Economists serving clients with high quality but cost effective financial modelling support and training delivered by team of experts around the world.


APTA OIL & GAS MODELLING TEAM

APTA's dedicated Excel modelling team is led by Santosh Singh. Santosh has more than 15 years of core industry experience. With a technical background in drilling engineering and further qualification in Finance and Economics, he has worked in several technical and commercial functions and gained extensive experience in economics evaluation, business development and commercial agreements.

Santosh's has a proven ability in financial modelling and data analysis using Microsoft Excel and providing high quality decision support to management for investment decisions. He also undertakes engagements with universities for guest lectures about financial modelling using Excel, petroleum economics, business analysis, and data modelling in Excel.



SANTOSH SINGH
PRINCIPAL CONSULTANT, OIL & GAS TEAM

A close-up photograph showing a hand holding a piece of dark, charred food, possibly a piece of meat or vegetable, over a bowl of liquid. The liquid in the bowl is dark and has a swirling pattern, suggesting it might be a sauce or broth. The background is a light-colored surface, possibly a table or countertop.

WHAT IS THIS
COURSE ALL
ABOUT?

ABOUT THIS COURSE

Whether you work for a big corporation or a small firm, since you're reading this brochure chances are you are a daily user of Microsoft Excel. Your work probably involves summarizing, reporting, and analyzing data or building financial models in Excel. Those who have attended this course often tell us that the tools and methods they learn in this course helped them save them hours of time in their job and provided them with new approaches for analyzing important business problems.

WHO IS THIS COURSE FOR?


This program is suitable and highly recommended for students of business and finance, energy studies, energy managers, Economics and Finance Analyst, bankers, supervisors and other key employees from Finance, Commercial department, etc. The use of Excel is so pervasive in corporations that it is vital for anyone who has to interact with Excel in their job functions. This course will enhance your Excel productivity and propel you in the league of Excel power users.

COURSE DURATION & VENUE

This course is usually organized over five days. We offer this course at location of participant's choice; can be in-house, on campus or offsite. Please call us or write to us for more details. We are open for any suggestions.

REQUIREMENTS

Each delegate **must** bring their own Laptop. The Laptop must have Excel (version 2007, 2010, or 2013) installed in their Laptop, as this course is Excel intensive and delegates will be doing Excel based exercises.



WHAT WILL I
LEARN IN
THIS
COURSE?

LEARNING OBJECTIVE STATEMENT

Participants will learn to understand the basic and advanced features and functions of Excel. By the end of this structured course they will be able to use Excel with confidence like any power business user is supposed to be, efficient and productive. For that we expect the following items to be a bare minimum for anyone who use Excel for data reporting and analysis to know as a must.

✓ **Counting and summing formulas**

A good grasp of how to use Excel formulas will give you the edge over the majority of users who just create formula which look like =A1+A2+A3+A4. As a proficient user of Excel the following formulas are a must know item:

COUNTIF, COUNTIFS, COUNTBLANK COUNT, COUNTA, SUM, SUMIF, AVERAGE, SUMIF, AVERAGEIF, SUMIFS, AVERAGEIFS.

There is a lot more and the rabbit hole goes ever deeper, but in our view the formulae above will suffice, and if used together and in conjunction with others you've got a vast arsenal of weapons with which to attack that messy information.

✓ **Lookups**

The VLOOKUP, HLOOKUP, INDEX, MATCH, OFFSET and INDIRECT formulae in Excel are invaluable for data manipulation and analysis. Many a time you will deal with data from multiple sources which will require you to either combine them or find them from various list based on certain criterion. This is where lookup formula comes to your rescue.

✓ **Conditional formatting**

You want to see which items in stock are selling below a certain point but wants it colour coded so that you can instantly identify items. This is where conditional formatting comes in. Want to highlight in red every item that sold less than 500 units this year? Conditional formatting is the key. It works dynamically too, so if a value changes, so will the formatting. Formatting can be done on single or multiple cells or rows and columns.

✓ **Filters**

In addition to conditional formatting, this feature of Excel that you can take advantage of to make data analysis and viewing much easier. Applying a simple auto filter to your spreadsheets will enabled you to instantly view all information related to a certain months sales rather than a full years' worth!

✓ **Protecting your spreadsheets**

Worked for about a month on your data and analysis? Worried that someone might delete or change data? Spreadsheet protection is the answer. This very simple to implement security allows you to control what kinds of changes others can make to your work. You can do this at cell, worksheet or workbook level, so you control what others can and can't do. Especially useful if you're sharing a workbook with others for data entry but don't want them to change constant values (such as item prices, vat, etc.)

✓ **Text manipulation**

This is something you might not be using every day, but knowing the basic about them will come in useful at some point. What if you need to make a list of people by their family name first followed by first name or vice versa or find the first three letter of their surnames? The formulae below are extremely powerful if they are nested within each other and good to know in such situations.

LEFT, RIGHT, MID, CONCATENATE, LEN, FIND, SEARCH, SUBSTITUTE

✓ **Charting basics**

A picture tells more than a thousand words. One can easily spot the trends or an anomaly in a data series instantly, the numbers of widgets sold each month, and the average customer satisfaction scores in graphical form. Graphs and charts are quite complex if you want them to be, but the basics often will suffice, and a good grasp of this skill will give you the information you need for your monthly meeting.

✓ **Formatting sheets & keyboard shortcuts**

A good grasp of the shortcuts provided by Excel will really cut down the amount of time you spend on navigating and selecting your data in Excel. As simple as that.

✓ **Array formulas**

Array formulas are extremely useful and impressive, especially when dealing with large amounts of data where you need an overall calculation in just one cell instead of creating extra rows and columns to find out the largest selling item this year.

✓ **Conditional/Logical Formulas**

The most useful formulae you must know as an Excel user, if you want to get ahead of the rest of the pack. The conditional formulae are invaluable for calculations and analysis on certain things. Do you have variable discounts on items based on age, or on whether a discount card has been used? You can create

a formula which will carry out a different calculation based on criteria that you specify. And all you need to know is:

IF, AND, OR, NOT

A good use of these can really enhance your analysis. And that's about it. These categories of data analysis tools, if learned and used correctly can really improve your data analysis work and can make you the office Excel master.

In addition to the above list as you will also learn the following items as we will progress through the day.

- ✓ Create a drop down list of options in a cell and validating Data
- ✓ Text & Dates Functions
- ✓ The Paste Special Command
- ✓ Formatting Sheets
- ✓ Spin Buttons, Scroll Bars, Option Buttons, Check Boxes, Combo Boxes, Group List Boxes
- ✓ Importing Data from a Text File, Document or from the Internet
- ✓ Consolidating Data & Creating Subtotals
- ✓ Three-Dimensional Formulas
- ✓ Using the Scenario Manager for Sensitivity Analysis
- ✓ Auditing Worksheets, trace cell precedents & cell dependents, watch and evaluate formulas
- ✓ Locate errors in formulas & invalid data and formulas
- ✓ Goal seek to reverse calculate a formula
- ✓ Setting up and manipulating scenarios for What-If analysis
- ✓ Group and outline features

COURSE TAKEAWAYS

Apart from enhancing their knowledge base and skills in data analysis and business modelling in Excel, the enrollee of this program will:

- ✓ Be provided with course manual including all examples Excel files.
- ✓ *Get free assistance in future for any Excel modelling queries. (subject to a cap on the number of free hours assistance)*

FEES

We can structure fee either as fixed amount or variable depending on number of days/participants for the course. Please call us or write to us to discuss about the fees and payments structure.

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