ERP Reporting Automation with Macros and Scripts Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced business environment, organizations are inundated with data from multiple sources. Manual reporting not only consumes valuable time but also increases the risk of errors and delays in decision-making. ERP Reporting Automation with Macros & Scripts empowers professionals to streamline reporting processes, enhance data accuracy, and deliver actionable insights in real-time. By leveraging Excel Macros, VBA scripting, and ERP integration techniques, participants can automate repetitive reporting tasks, minimize human errors, and significantly improve operational efficiency.

ERP Reporting Automation with Macros and Scripts Training Course is designed for finance, operations, and IT professionals who want to harness the full potential of ERP systems for smarter reporting. Participants will gain hands-on experience in creating dynamic dashboards, automated financial reports, and real-time performance tracking systems, ensuring that organizations remain agile and data-driven. Through practical case studies and step-by-step guidance, this course bridges the gap between manual reporting and intelligent automation, preparing learners to excel in an increasingly competitive business landscape.

Programme Curriculum

ERP Reporting Automation with Macros and Scripts Training Course

Introduction

In today’s fast-paced business environment, organizations are inundated with data from multiple sources. Manual reporting not only consumes valuable time but also increases the risk of errors and delays in decision-making. ERP Reporting Automation with Macros & Scripts empowers professionals to streamline reporting processes, enhance data accuracy, and deliver actionable insights in real-time. By leveraging Excel Macros,

VBA scripting, and ERP integration techniques, participants can automate repetitive reporting tasks, minimize human errors, and significantly improve operational efficiency.

ERP Reporting Automation with Macros and Scripts Training Course is designed for finance, operations, and IT professionals who want to harness the full potential of ERP systems for smarter reporting. Participants will gain hands-on experience in creating dynamic dashboards, automated financial reports, and real-time performance tracking systems, ensuring that organizations remain agile and data-driven. Through practical case studies and step-by-step guidance, this course bridges the gap between manual reporting and intelligent automation, preparing learners to excel in an increasingly competitive business landscape.

Course Duration

5 Days

Course Objectives

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

1. Automate repetitive ERP reporting tasks using Excel Macros.
2. Develop custom VBA scripts for dynamic data extraction.
3. Integrate ERP data with external tools for real-time reporting.
4. Build interactive dashboards with actionable insights.
5. Apply data validation and error handling techniques in automated reports.
6. Implement financial and operational KPI tracking with scripts.
7. Optimize report generation for speed, accuracy, and scalability.
8. Transform raw ERP data into visual analytics and insights.
9. Develop scheduled reporting automation workflows.
10. Ensure compliance and audit readiness in automated reports.
11. Leverage conditional formatting and pivot tables for dynamic reporting.
12. Integrate advanced formulas and macros for complex calculations.
13. Solve real-world ERP reporting challenges through hands-on case studies.

Target Audience

1. Finance and accounting professionals
2. ERP analysts and consultants
3. IT and systems administrators
4. Business intelligence specialists
5. Operations managers
6. Data analysis and reporting specialists
7. Project managers handling ERP implementations
8. Professionals aiming to improve productivity via automation

Course Modules

Module 1: Introduction to ERP Reporting Automation

- Overview of ERP systems and reporting challenges
- Role of automation in improving efficiency
- Basics of macros and scripting in ERP
- Understanding key ERP data structures
- Case Study: Manual vs automated ERP report for a retail company

Module 2: Mastering Excel Macros for ERP Reporting

- Recording and editing macros for repetitive tasks
- Automating data import/export from ERP systems
- Creating dynamic templates for reports
- Debugging and error handling in macros
- Case Study: Automating monthly sales report in Excel

Module 3: VBA Scripting Essentials

- Introduction to VBA and scripting environment
- Writing scripts for data extraction and transformation
- Creating user-defined functions for reporting
- Automating complex calculations with VBA
- Case Study: Automating financial consolidation using VBA

Module 4: Advanced Data Integration

- Connecting ERP data with external sources
- Automating data refresh and synchronization
- Handling large datasets efficiently
- Data cleaning and transformation techniques
- Case Study: Real-time inventory report integration from ERP to Excel

Module 5: Dashboard Creation & Data Visualization

- Designing interactive dashboards
- Using pivot tables, charts, and slicers for reporting
- Conditional formatting for actionable insights
- KPI visualization and performance tracking
- Case Study: Executive dashboard for a manufacturing company

Module 6: Scheduled Reporting & Workflow Automation

- Automating report generation and distribution
- Creating scheduled macros and scripts
- Emailing and sharing reports automatically
- Workflow optimization for recurring reports
- Case Study: Automated monthly financial report distribution

Module 7: Compliance, Audit, and Security in Reporting

- Ensuring data integrity and accuracy
- Protecting sensitive ERP data
- Implementing audit trails for automated reports
- Regulatory compliance considerations
- **Case Study:** Automating audit-ready reports for compliance

Module 8: Real-World ERP Reporting Challenges

- Identifying bottlenecks in reporting processes
- Troubleshooting automation issues

- Best practices for sustainable automation
- Continuous improvement of reporting workflows
- Case Study: ERP reporting automation success story from a global company

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com