Excel Tips and Techniques for Increased Productivity and Improved Financial Modeling: Intermediate (ETTI)

Course Overview

This course will deliver a wide assortment of tips, techniques, features, commands and functions that will improve your productivity and financial modeling skills. You'll focus on implementation mechanics, practical applications of key concepts and view a demonstration model. You'll also be introduced to macros using the macro recorder.

Among other items, you'll learn how to add/remove 'buttons' from the QAT (Quick Access Toolbar); create dynamically linked pictures using the Camera feature; construct "Smart Text" using CONCATENATION; create named ranges using the Name Box; and find and eliminate LINKS.

Note: Course format is lecture style. Laptops are not required, but are encouraged. A CD with selected demonstrations is provided.

Objectives

- Identify three problems caused by MERGING cells.
- Determine if a cell has TEXT or VALUES and why it's important.
- Identify three advantages of named ranges using the Name Box.
- Recognize the 10 steps to follow when creating a model.
- Identify a potential fraud situation using the HISTOGRAM tool.
- Recall how to create a macro using the macro recorder.

Major Topics

- Ribbons and Quick Access Toolbar
- New Excel capabilities
- Key features for building models, including Camera, Grouping, Filtering, Goal Seek, Sorting, Subtotaling, Data Validation, Conditional Formatting and Protection Techniques
- Macros and the macro recorder
- Pivot tables: Proper setup for best results
- Financial modeling architecture best practices
- Selected fraud investigation tips using Excel, including Benford's Law

Field of Interest Code: Computer Science

CPE Hours: 8.00

Level: Intermediate

Designed for:

CPAs, CFOs, controllers, accounting managers, treasurers, finance vice presidents, financial planning & analysis managers, financial analysts and others who use Excel to analyze data and present financial information.

Author: Augusta & Associates

Instructor: Eric Augusta, MBA