

# A1 Excel Fundamentals for Finance (1 day)

Learn from industry experts with insights from years of practical experience!



## Who Should Attend?

Accounting and Finance staff who have had a little experience using Excel and understand some of the basics, but want to dig deeper into how Excel can really be used properly.

Typical attendees include:

- new graduates
- newly promoted staff
- staff who need an Excel refresher

## Course Objectives

To provide participants with an understanding of the tools, techniques and functions in Excel that are of greatest benefit to finance and accounting.

To provide a good grounding in sound Excel practices and techniques.

## Pre Requisites

Participants need only have a general understanding of Excel prior to attending.

## Facilitator

**Rachel Gregory**  
*Masters of Professional Accounting (MPA), CPA (current), BCom (Finance & International Business), Senior Associate of the Financial Services Institute of Australia, Microsoft Excel Expert*



Rachel is a Senior Business Analyst with Access Analytic, an Australian consulting company that specialises in providing business analyst tools and services to companies that value financial expertise and need to make decisions with confidence.

Rachel has extensive experience in across a wide range of industries, ERP software and database systems, and has highly advanced skills in Excel and VBA macro programming to improve data analysis, management reporting, and the budgeting/forecasting processes.

She holds a Masters in Professional Accounting and is also an experienced and energetic communicator who specialises in training and presentations.

Rachel is highly experienced, having completed many successful projects for corporates of all sizes in areas such as:

- Budgeting and forecasting
- Financial modelling
- Board and Management reporting information packs
- Revenue/Cost data analysis and reporting
- Business process improvement and systems
- Project analysis and reporting
- Spreadsheet/database systems integration

## Course Summary

The key areas are listed below.

As with all our courses, the examples and exercises in this module are focussed on equipping accountants and finance staff with the knowledge and skills they need to perform the tasks they typically do on a regular basis.

## Functions

- Financial functions (PMT, NPV, IRR etc)
- Logical functions (IF, AND, OR)
- String functions (LEFT, RIGHT, MID etc)
- Date & time functions
- Aggregation functions (SUBTOTAL etc)
- Lookup functions (VLOOKUP etc)

## Charts

- Add, remove, resize, modify charts
- Working with chart elements
- Formatting charts
- Chart types

## Formatting

- Borders and shading
- Autoformat
- Custom number formats
- Conditional formatting

## Navigation

- Hyperlinks
- Viewing a large file

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## Continuing Education

This course provides 7.5 contact hours towards continuing education requirements.

## Key Details

Class sizes are strictly limited to 7 or less to ensure maximum contact with the presenter.

Comprehensive course notes plus a CD are included.

Just call us on +61 8 6210 8500 and we'll arrange everything!

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