

E4 Upgrading to Excel 2007 for Finance (1 day)

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



Who Should Attend?

Staff who have experience with Excel 97-2003 and have moved or will soon move to Excel 2007.

Typical attendees include:

- Management Accountants
- Financial Accountants
- Business/Finance Analysts
- Other Finance/Accounting staff
- Banking professionals

Course Objectives

To provide participants with a clear understanding and best use of Excel 2007's new user interface and features.

Demonstrate how to perform common finance tasks with the new interface as well as providing guidance on how 2007's new features can benefit finance users.

Pre Requisites

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

Facilitator

Wyn Hopkins

B.Sc. (Hons) Accounting & Financial Management, CA, Excel Expert

Wyn 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.



Wyn gained his Chartered Accountant qualification at PricewaterhouseCoopers in the UK in 2000.

He has extensive international Business Analyst experience, having worked with a variety of the UK's FTSE 100 financial services companies including Halifax Bank of Scotland (HBOS) and Barclays Bank.

Wyn has specialist knowledge and experience in industry sectors ranging from oil and gas, through financial services, to telecommunications and agribusiness.

Wyn is highly skilled and has completed many successful projects in areas such as:

- Financial analysis
- Strategic financial modelling
- Financial model auditing
- Management reporting & board packs
- Business budgeting & forecasting
- Excel/ERP systems integration & consolidation
- Value-based management techniques

Course Summary

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

Converting to Excel 2007

- Where is everything?
- New icons, & changed icons
- Quick Access Toolbar

New Functions

- Logical functions (IFERROR)
- Aggregation functions (SUMIFS, COUNTIFS)
- Average (AVERAGEIF, AVERAGEIFS)

Charts and Pivot Tables

- Specific Ribbons
- Screen layout changes
- New features

Formatting

- New formatting options
- Conditional formatting
- Smart Art
- Tables

Printing

- Page Layout View

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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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