

Excel: Accounting Functions, PivotTables and Power PivotTables

Excel is a powerful tool for accounting and financial analysis. In this two-day Zoom class on Excel Functions, PivotTables, and Power PivotTables, we will explore how these tools can be used to analyze financial data and create reports. During this interactive, guidance rich workshop we will cover a range of topics, including:

Agenda

- I. Introduction to Excel functions and formulas
 - a. Basic arithmetic and statistical functions
 - b. Date and time functions
 - c. Text functions
 - d. Logical and conditional functions
 - e. Lookup and reference functions
 - f. Using functions to analyze financial data
 - (1) Five methods of calculating depreciation
 - (2) Internal Rates of Return
 - (a) Internal rate of return for a schedule of cash flows which are periodic
 - (b) Internal rate of return for a schedule of cash flows that is not necessarily periodic
 - (c) Modified internal rate of return for a series of periodic cash flows
 - g. Interest rate calculations function
 - (1) Mortgage payment calculator
 - (2) Interest on fixed loan payment for a given periodic
- II. PivotTables
 - a. Using AutoFormat to create your PivotTable quickly and easily
 - b. Creating a PivotTable
 - c. Changing the function
 - d. Modifying a PivotTable
 - e. Changing PivotTable options
 - f. Using the slicer
- III. Pivot Charts
 - a. Creating pivot charts
 - b. Modifying chart options
 - c. Display your data using a PivotChart

IV. Using Excel's Auditing Features

- a. Seeing precedents in normal cell editing
- b. Displaying precedent arrows
- c. Removing arrows

V. Using Excel's Data Analysis Add In

- a. Get to know the Analysis Toolpak
- b. Enabling the Analysis ToolPak add in
- c. Description statistics
- d. Deleting Analysis ToolPak results
- e. Regression Analysis
- f. Learn to use Excel's advanced data analysis tools to return a multitude of statistics about your data in just a few keystrokes [Example: Five depreciation methods]
- g. Use Excel's built-in utilities to analyze correlations in your data

Benefits

This fast-paced, interactive workshop can provide numerous benefits to attendees, including:

Enhanced Accounting Skills: Participants will learn various accounting functions and techniques that can help them streamline financial data analysis, budgeting, forecasting, and reporting.

Improved Data Analysis: The workshop will focus on using Excel Functions, PivotTables and Power PivotTables to analyze large data sets, which can help attendees identify trends, patterns, and anomalies in financial data.

Time-saving Techniques: By using Excel Functions, PivotTables and Power PivotTables, participants can automate the data analysis process and save time spent on manual data entry and calculation.

Better Decision Making: The workshop can help attendees make better business decisions by providing them with the tools and techniques necessary to analyze financial data accurately.

Increased Productivity: With the knowledge gained from the workshop, participants can be more productive and efficient in their work, resulting in cost savings for their organizations.

Career Advancement: Improved accounting skills and data analysis techniques can help attendees advance their careers by making them more valuable to their organizations and increasing their chances of promotion.

Overall, Tribes or tribal enterprises making this workshop available to their staffs will make an excellent investment in their employees' accounting and financial skills.

