Excel Tips, Tricks, and Tools for the CPA

Course Description

This course is designed for the intermediate user of Excel 2013 and 2016 who are looking to improve their productivity and to learn some cool new Excel skills. The course covers some basics, along with some advanced tips and tricks on selecting, navigating as well as copying and moving data efficiently. It also covers a spectrum of functions that can be used in everyday practice. Functions such as SUBTOTAL, SUMIF, SUMIFs as well as INDEX MATCH are discussed. New functions, such as AGGREGATE, IFNA, TEXTJOIN and IFS functions are covered. Comparing lists using arrays is overviewed. Pivot tables are discussed in detail. Other topics include: functions and tools for importing data into Excel, conditional formatting as well as charts. There are no associated Excel files.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Overview. This program is appropriate for professionals at all organizational levels.
CPE Credits: 3 (CPA)
Category: Computer Software and Applications
Prerequisite: Excel 2013, 2016. Users of Excel 2010 should not have a lot of difficulty however some features will not be available or may in a slightly different location. You should be comfortable using Excel at a basic level.
Advanced Preparation: None

Course Learning Objectives

After studying this course you will be able to:

1. Recognize different short cut keys and what they do
2. Identify and create range names
3. Recognize different ways to navigate within and between Excel workbooks
4. Identify some of Excel's new features and functions
5. Recognize different copy and move methods
6. Identify different types of formatting and how to apply them
7. Identify different functions and formulas and when to apply them
8. Recognize the different components of a Pivot Table and how to create and edit them
9. Identify types of charts to use and how to create them
10. Identify features that allow you to evaluate the workings of formulas and functions