

Excel Illuminated

Automating Financial Statements

Course Description

Excel expert David Ringstrom, CPA, will teach you how to create dynamic financial reports—for any month of the year—on a single worksheet. Many Excel users build a worksheet for each month of the year, which can be inconvenient and tiresome to revise. Rather than using such a cumbersome method, David demonstrates how to apply the VLOOKUP, OFFSET, and SUM functions to quickly create accounting reports that allow you to toggle to any reporting period with just a couple of mouse clicks. In addition, David shares effective ways to export data from your accounting package so you can create a “set-and-forget” link to your accounting data in Excel.

David demonstrates every technique at least twice: first, on a PowerPoint slide with numbered steps, and second, in the subscription-based Office 365 version of Excel. David draws your attention to any differences in the older versions of Excel (2019, 2016, 2013, and earlier) during the presentation as well as in his detailed handouts. David also provides an Excel workbook that includes most of the examples he uses during the webcast.

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: 2 (CPA)

Category: Computer Software and Applications

Prerequisite: None

Advanced Preparation: None

Course Learning Objectives

After studying this course you will be able to:

1. Identify what object type Microsoft Query considers worksheet tabs within Excel workbooks to be.
2. Recognize how to determine if you're using the Office 365 version of Excel.
3. Identify how and when to use the Name Manager command.