

# Financial Analysis Certificate Master Classes

An extension to Australia's premier Excel course  
for finance professionals



## Business Intelligence Tools in Excel Master Class (2 days)

This master class is designed to introduce and demonstrate the business intelligence tools built into Excel. In a series of workshops, the newer ETL (Extract, Transform and Load) tools introduced into recent versions of Excel are demonstrated, starting with less challenging data, a set of analytical reports is built.

As the exercises develop, more complex and difficult data sources are combined into the reporting tasks and the features of Power Query are demonstrated in taming poorly structured and formatted legacy data sources.

Once the data is imported into Excel, the new Data Model, DAX data analysis language and the features of Power Pivot are demonstrated to prepare the data for a set of detailed reports and executive summaries.

Finally, the presentation tools, Power View and 3D Maps are demonstrated and the use of new filtering tools introduced in Excel 2010 and upgraded and extended in more recent version, are demonstrated to provide user-friendly and powerful reporting tools.

### Sample Applications

- Data consolidation and reporting
- Period-end sample, consuming multiple data sets from ERP, HR and manufacturing
- Web-sourced data samples
- Complex ETL samples demonstrating powerful data-cleansing methodologies
- Reports and executive summaries

### Tables

- What are tables, and what are tables good for
- Tools and features for working with tables
- Alternative notation used in table-referencing formulas
- Creating / removing tables
- Naming tables

### Advanced PivotTables

- Calculated fields
- Calculated items
- Changing field view
- Extracting data from PivotTables (2 methods)
- Using slicers & timelines to filter data

### Add-ins

- How & when to install PowerPivot & Power View add-ins (2010 / 2013)
- Enabling / disabling add-ins

### Power Pivot (2010+)

- About Power Pivot
- About the Data Model
- Linking tables in the Data Model
- Using DAX (Data Analysis Expressions)
- Key DAX functions, such as HASONEVALUE, BLANK, IF etc
- Improving data analysis by using DAX rather than worksheet formulas
- Working with hierarchies
- Creating and managing Measures
- Creating and managing KPIs
- Utilising Measures & KPIs

### Power Query (2013+)

- About Power Query
- How Power Query vastly simplifies and streamlines ETL
- Data Sources
- Using Power Query Formula Language (aka M)
- Creating & Editing queries

### Power View/3D Maps (Excel 2013 or 2016 required)

- Working with Power View / 3D Maps
- Selecting and customising visualisations
- Working with maps
- Publishing including Office 365
- Building compelling presentations

# About the Financial Analysis Certificate Master Classes

A series of one and two-day master classes focusing on advanced modelling and analytical tasks. Most of these courses are open to all Excel users. They have been designed as companion master classes and extensions of the core knowledge and skills presented in the Financial Analysis Certificate (FAC).

This series delves more deeply into specific subject areas or builds greater expertise in those areas than is suitable in the FAC. It also addresses the desire from many of our past students to provide ongoing training & support in a format that they appreciate.

## Modes of Study

- In class mode: 16 hours over two days – now in all capital cities
- Private offerings also available

## Key Outcomes

- Gain advanced skills in key subject areas, such as advanced modelling, advanced reports & dashboards;
- 16 hours of continuing professional education per session for accountants;
- Develop advanced sensitivities;
- Develop advanced & dynamic reporting tools;
- Learn how to harness Power Query, PowerPivot and Power View/3D Maps.

## Each Session Delivers

- Core knowledge for the specialised subject area;
- Re-usable examples demonstrating proven methodologies;
- Guidance on how to avoid real-world problems;
- Advanced techniques to extend the power of formulas without needless complexity;
- Access to online support and some extended content available through the online student portal.

## Who Benefits

- Those who have previously completed the Financial Analysis Certificate looking to extend their knowledge.
- Other candidates who have suitable knowledge and experience wishing to gain these advanced skills.

## Benefits for the Employer

- Practical pathways for staff to enhance their modelling and analytical skills;
- Access to proven and effective strategies for advanced model building & report writing;
- Ongoing training and continuing professional education opportunities for staff.

## Currently Available Master Classes

The following master classes are currently available in this series, more will be added soon.

Master Class	Duration
Master Class 1 Advanced Financial Modelling Master Class	2 days
Master Class 2 Business Intelligence Tools in Excel Master Class	2 days
Master Class 3 Charting & Dashboarding Master Class	2 days

## Excel Version

- The course materials are compatible with all versions of Excel from Excel 2010, and version specific instructions are given where required. However, note that some features demonstrated and utilised in the courses may only be available in later versions of Excel.
- Public courses are presented using Excel 2016. On student PCs, any version from Excel 2010 onwards may be used, but we would recommend Excel 2013 or later.
- On the Macintosh, Excel 2016 is fully supported, except for Master Class 2: Business Intelligence Tools in Excel, which relies on features not supported in Excel.

## Course Materials

- The course materials vary depending upon the subject matter and technical references required, but each workshop's manual includes at least 30-40 pages of material per day of instruction, plus access to some further content online.
- A full set of blank and worked sample workbooks as well as a number of reference documents are available for download from the online student support portal.

## Public Courses

Public offerings of the Financial Analysis Certificate Master Classes are available in all capital cities. For details, visit our web site ([www.clarksonitt.com/calendar](http://www.clarksonitt.com/calendar)) or call +61 (0) 417-777-750.

## Private Courses

In-house offerings of the Financial Analysis Certificate Master Classes can be arranged anywhere in Australia & we can assist with the hire of suitable training facilities where those are not available in-house. This would prove economical where a number of staff have previously completed the Financial Analysis Certificate or had attained an equivalent skill level. Requirements for facilities are discussed on our web site. For a quotation or to discuss your particular needs, call +61 (0) 417-777-750.

## About the Course Author and Lead Presenter



Following an early career in both public and commercial accounting, James Clarkson has more than twenty-five years' experience as a presenter of professional programs and more than thirty consulting & model building for corporate clients.

He has gained wide experience in model & analytical report design & development and also has wide experience in application development using Microsoft Office (especially Excel), Visual Basic & Visual Basic for Applications (VBA).

He is an outstanding educator, having presented to more than 7,500 students in long-format multi-day courses and thousands more in short courses over more than 25 years.

He has a demonstrated ability to clearly explain difficult and technical subjects and consistently rates above 90% for satisfaction across a number of measures on student evaluations.

## Financial Analysis Certificate



The Financial Analysis Certificate is our premier modelling & analysis course. It is a multiday course of 48 hours duration and covers all the fundamentals and modelling and analysis tasks to an advanced level. It is a prerequisite for attendance at some of the Master Classes. Public offerings are available in all capital cities of Australia and it is also available for in-house presentation.