



FINANCIALEDGE⁷

The Business Toolkit

MICRO-DEGREE COURSE OUTLINE

The Business Toolkit Micro-degree

This course is designed to give graduates straight out of University the necessary tools to be able to add value to their new organizations quickly. Some of skills they will learn relate to applying best practice to common software packages such as Microsoft Excel, Word and PowerPoint. They will also learn soft skills such as presenting, communication and career management.



21.5

Hours

34

Topics

81

Exercises

5

Exams

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Excel Efficiency for Financial Modeling and Data Analysis

Excel Basics 4001

This session covers core Excel skills needed to work quickly and efficiently. Keyboard shortcuts are taught and participants work in their own file, gradually building up their use of shortcuts and getting away from using the mouse. This includes navigating the worksheet, selecting cells, building formulas, etc. The more advanced elements of the SUM function are given a focus as well as how to build a number of formulas often used in financial modeling.

Subjects covered:

- Keyboard shortcuts in place of the mouse
- Cell selection
- Sheet navigation
- SUM and autosum
- Formulas
- Key formatting – all consistent with client standards

Advanced formatting 4015

- Cell styles
- Conditional formatting
- Data validation

Exploring a model 4020

- F5 tips and tricks
- Camera tool
- Watch window
- Split windows
- Circularity issues

Text and date functions 4030

- Text and date functions
- Text and date best practices
- Working with pdfs
- DATE, YEAR, MONTH, DAY and EDATE functions
- Date formatting

Scenarios 4040

- Allow assumptions and methodologies to be changed quickly in financial models using a number of different functions:
- Choose, Offset, Index, adding the Match function
- Data validation and form controls
- Conditional formatting

Data extraction 4050

- Summary tables and lookups
- Vlookup, Hlookup, Vlookup and Match, Index and Match, Offset and Match
- Working with multiple sheets
- Indirect, Named ranges
- Transposing data
- Transpose function, Offset, Row & Column, Offset & Match, Index & Match

Sensitivity data tables 4060

- Using data tables

- Data tables on different sheets to the assumptions
- Advanced and flexible tables

Goal seek and Solver 4065

- Uses of Goal Seek and Solver
- Goal Seek functionality
- Solver functionality

Database analysis 4070

Participants are introduced to different data manipulation tools in Excel.

- Building a database in Excel
- Sorting and filtering data
- Pivot tables
- D functions
- Sumif function

Excel VBA And Macros Introduction 4500

- Excel options
- Information pages and branding
- Styles
- Templates
- Colors, fonts and themes
- Planning for printing
- Other template elements

Introduction to Python

Python programming is one of the most precious skills in the world of finance. Python is a programming language used to organize and visualize data to provide actionable insights, create desirable data forms and essential outputs to support the business requirement documents. This Python program rapidly develops programming skills for financial calculations and financial data analysis, with a focus on practical application. Participants will learn the essential skills required to make the most of programming opportunities, and gain a comprehensive understanding of the programming concepts, as well as extensive practical experience in some of the core data analysis libraries used in Python.

Getting Started with Python 12210

- What is Python and why should we use Python
- Efficiency of Python
- How Python is used in the finance industry
- Different Python options available
- Installing Python
- Selecting Python tools and Integrated Development Environments (IDEs)

Python Basics 12220

- Basic operators
- Naming and storing values in variables
- String concatenation and replication
- Creating lists and sets
- Basic functions
- Finance case study

Building Functions in Python 12230

- IF statements
- For and while loops
- Building functions
- Combining Python functions, loops and statements
- Finance case study

Introduction to Libraries 12240

- Types of libraries
- About Pandas
- About NumPy
- About Matplotlib

NumPy 12250

- Installing NumPy
- NumPy arrays
- Examples of vectors and matrices
- Creating a NumPy array from a list
- Creating a NumPy array using built-in functions
- Creating an array of random numbers using NumPy
- NumPy finance functions

Pandas 12260

- What is a Pandas
- Why use Pandas
- Capabilities of Pandas
- Object creation
- Creating dataframes in Pandas
- Pandas dataframe syntax
- Indexing data from dataframe
- Importing data into Python
- Important dataframe operations

Matplotlib 12270

- About Matplotlib
- Link between Matplotlib and Pyplot

- Intro to Pyplot
- Plotting with keyword strings
- Creating plots
- Plotting different data types
- Limits, legends and layouts

Utilizing Dates and Time in Python 12280

- Datetime classes
- Formatting time
- Using calendars
- Finance case study

Word Fundamentals for Professionals

Most people who have used a computer as part of their education or in the workplace will be familiar with Microsoft Word (Word) without necessarily fully understanding and utilizing all the available functionality. This course will take a self-taught beginner and turn them into an advanced user in just a few hours. We will introduce features that will save time, improve efficiency and accuracy, and make laborious tasks quick and simple. If you have ever manually created your own table of contents, struggled to put figures and charts in the right place or spent time updating the same document dozens of times to send out a mailer, then this course is for you.

Subjects covered:

- The Microsoft Word interface
- Using keyboard shortcuts for efficiency
- Planning and writing a new document
- Navigating and editing an existing document
- Paragraph and style settings
- Useful tools for larger documents

Introduction to Word 14300

- Understanding the ribbon and the File tab
- Keyboard shortcuts and customizing the quick access toolbar
- Best practice when creating a new document
 - Showing paragraph marks to understand formatting
 - Carriage return versus soft return
 - Using tabs to indent
 - Using styles for headers
- Navigation, editing and selecting text
 - Keyboard
- Backspace vs delete
- Shift + arrow to select
- CTRL + arrow to navigate
- Pg up and pg down

- Mouse
- Double click
- Triple click
- Selecting a line with one click
- Using the mini toolbar
- Saving a document
 - Save vs save as
 - Templates vs documents
- Creating a simple template

Formatting in Word 14310

- Paragraph
 - Alignment
 - Indentation
 - Spacing
- Adjusting a whole document
 - Bullets and numbering
- Changing the order of a list with Alt + Shift
- The font menu
 - Changing fonts
 - Size, color and highlights
 - Superscript and subscript
 - Change case quickly
- Styles
 - Efficient use of styles
 - Creating a style
 - Using styles to reorder a document quickly
 - Using styles to create an automatic table of contents

Insert 14320

- Headers and footers
 - Page numbers
 - Text
- Show file path for easy retrieval
 - inserting logos
- Using comments when collaborating
- Complex mathematical equations
- Images from the web and other documents
 - Resizing
 - Cropping
 - Wrapping text around images

Common tasks 14330

- Find (CTRL + F) and replace (CTRL + H)
- Spell check

- Autocorrect
- Track changes
- Password protection
- Saving in Adobe Acrobat

PowerPoint Fundamentals for Professionals

PowerPoint slide decks are widely used in business to support discussions in client meetings and internally. This course takes participants through the tools available within PowerPoint to make building slide decks simple, efficient and effective. Once the basics have been mastered, the key steps required to plan and build an effective slide deck, including how to structure the deck, optimize the layout and use graphics and data will be discussed.

Introduction to Microsoft PowerPoint 14100

- Creating a new document
- Understanding the ribbon and the Quick Access Toolbar (QAT)
- Useful Keyboard shortcuts
- Slide layouts and the slide master
 - Standard view versus widescreen

Working with basic shapes 14110

- Inserting
- Moving and nudging shapes
- Using guidelines
- Resizing and rotating
- Align and distribute
- Send backwards, send forwards
- Selecting multiple objects
 - Group and ungroup

Working with text 14120

- Formatting
- Adjusting internal margins in shapes
- Find and replace
- Changing the order of text in a list
- Shapes vs text boxes

Lines and connectors 14130

- Start and end styles
- Linking objects

Pictures 14140

- Cropping

- Taking screenshots
 - Print screen
 - Snipping tool
- Compressing pictures to reduce file size

Charts and Tables 14150

- Simple PowerPoint charts
- Pasting charts as pictures from Excel
- Pasting dynamic charts from Excel
- Formatting
- Design and layout menus

SmartArt Graphics 14160

- Editing
- Converting text to SmartArt

Equations & Animations 14170

- Building complex equations
- Animation pane controls

Outlook Fundamentals for Professionals

Microsoft Outlook is one of the most widely used applications for Email, Calendar and Task management. This course will take you right from the initial setup of your email account through the basics of sending and receiving email and setting up folders through to more advanced features such as mail merge. You will also learn how to use the Calendar, Tasks and Notes features to stay organized. Finally, we will explore how you can efficiently manage your Contacts by setting up groups.

Introduction to outlook 14400

- Inbox setup
- Outlook data files

Sending email

- Creating and formatting a message
- Adding attachments
- Creating email signatures
- Selecting recipients from the autocomplete list
- Carbon copy and BCC
- Delay send
- Recalling messages

Receiving email

- Creating and formatting a message

- Replying and Forwarding a message
- Changing the view
- Sort and filter
- Setting up the Out of Office Assistant
- Folder management

Managing your calendar

- Creating and rescheduling appointments
- Sending invites to meetings
- Sharing calendars
- Managing timezones

Managing your tasks

- Creating a new task
- Creating a task from an email
- Assigning tasks

Managing your contacts

- Adding and editing a new contact
- Creating a contact from an email
- Setting up a contact group
- Emailing a group

Fundamentals of Effective Business Writing Business Writing

The participant will understand how to develop their writing skills to communicate effectively to their audience and deliver high impact statements.

Developing Your Business Writing Effectiveness 14350

- What business writing is important to performance and career success.
- Considering your goal and principles for making your business writing stand out.
- The 5 Steps to Business Writing Success
- The structure for Persuasive Business Writing.
- Using a Thorough Review Process.
- How to grab your audience's attention when writing emails.
- Using different Influencing Strategies.
- Breaking up Content and Avoiding Jargon.
- Avoiding 'Dilution language'.

Managing Your Brand and Career

The participant will understand how to build their brand with a focused application on managing their career path.

Building your brand and career 14020

- Understanding the 'Right Job for You.'
- Evaluating your Career Goals.
- Understanding what Truly Motivates and Unlocks Potential.
- Recognizing your 'Professional Sweet Spot'.
- The Importance of Performance, Image & Exposure.
- Building Your Leadership Brand.
- The Importance of Visibility to Driving your Career
- Making contact with Career-Developing Professional Contacts.
- The Behaviors of Successful Networking.



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