



BEACON HILL
FINANCIAL EDUCATORS

51A Middle Street Newburyport MA 01950
Phone: 800-588-7039 Fax: 877-902-4284
contact@bhfe.com www.bhfe.com

Course Information

Course Title: *Excel Worksheets Best Practices#293020*

Number of continuing education credit hours recommended for this course:

In accordance with the standards of the National Registry of CPE Sponsors CPE credits have been granted based on a 50-minute hour.

CPA: 1.5 (All states)

National Registry of CPE Sponsors ID Number: 107615.

Sponsor numbers for states requiring sponsor registration

Florida Division of Certified Public Accountancy: 4761 (Ethics #11467)

Hawaii Board of Accountancy: 14003

New York State Board of Accountancy (ethics): 002146

Pennsylvania Board of Accountancy: PX 178025

Ohio State Board of Accountancy: M0021

Texas State Board of Accountancy: 009349

Course Description

Remember when you went to update last year's budget projections and you wonder why certain formulas were there? Ever opened up a spreadsheet that someone else created and wondered "What the heck?". Chances are they were put together on the fly rather than designed well. It takes a little bit of time up front, but it is definitely worth it. Take a look at this course as you set up your budgets and year-end financial information and it will pay dividends next year when you open them because you won't need to wonder why that 10% is in cell J4 and why you can't figure out what that formula in cell T300 is doing. This course provides step by step instruction and Excel practice exercises as well as answer files.

Program Delivery Method: NASBA QAS Self-Study (interactive)

Subject Codes/Field of Study

NASBA (CPA): Specialized Knowledge and Applications (Computer Science)

Course Level, Prerequisites, and Advance Preparation Requirements

Program level: Overview
Prerequisites: Excel 2007 and higher
Advance Preparation: None

Course Content

Publication/revision date: 5/20/2020
/28/2017

Author: Joseph P. Helstrom, CPA

Final exam (online): Thirteen questions (multiple-choice).

Instructions for taking this course

You must complete this course within one year of the date of purchase (if you do not complete the course within one year, contact us to determine whether an updated edition of the course is available, in which case we will provide you with a PDF of the updated course and the online exam at no charge).

A passing grade of at least 70% is required on the final exam for this course. You may retake the exam if you do not pass it on the first attempt (no charge).

Complete the course by following the learning objectives listed below, studying the text, and studying the review questions at the end of each major section (or at the end of the course). Once you have completed studying the course and you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Final Exam Online

- Login to your account online at www.bhfe.com.
- Go to "My Account" and view your course.
- Select "Take Exam" for this course and follow instructions.

Additional Information

- The exam may be started, stopped, then resumed at a later date.
- The exam is "open book," it is not timed, and it may be retaken if not passed on the first attempt (no charge).
- Results (correct, incorrect answers) and certificate appear immediately upon passing the exam.
- CFP® and EA credits are reported weekly.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Objectives

- Recognize worksheet practices and Excel features that promote data clarity
- Differentiate Excel features that help ensure calculation accuracy
- Define data validation tools, formula auditing tools, workbook passwords and worksheet and cell protection tools

Copyright © 2020 by Mill Creek Publishing P.O. Box 611, Noblesville, IN 46061. All rights reserved. No part of this course may be reproduced in any form or by any means, without permission in writing from the publisher.

Contents

Course Information.....	ii
Learning Objectives	iii
Course Overview.....	5
Worksheet Layout.....	6
Name the Worksheet.....	6
Use Headings	7
Use Descriptive Column and Row Headings.....	8
Segregate Data, Assumptions and Calculations	8
Absolute Cell References	11
Named Ranges.....	12
Document Data Sources and Key Calculations Using Comments.....	16
Multiple Worksheet Workbooks.....	19
Headers and Footers.....	21
Print Titles.....	24
Worksheet Design.....	27
Input Data Check Totals	27
Formulas Require Cell References Rather Than Numbers	27
Use Constraints in Calculations.....	28
Use Comments to Explain Calculations.....	34
Review Questions	37
Worksheet Audit and Other Tools to Ensure Accuracy.....	38
Data Validation	38
Cell Protection and Worksheet Protection	45
Workbook Passwords.....	54
Highlighting all cells containing formulas.....	56
Trace Precedent and Dependent Cells.....	59
Error Checking.....	63
Watch Window	64
Review Questions	67
Glossary	68
Index.....	69
Answers to Review Questions.....	70