



VBA FOR FINANCE PROFESSIONALS

(Creating Macros)

SUMMARY:

This hands-on course focuses on the skills needed to harness the power of macros to help automate worksheet processes. Participants will learn to design, build and error check macros that are robust and easy to use.

Participants will be introduced to best practices using VBA (Visual Basic – the programming language for macros) and the construction of powerful, error-free macros.

Prerequisites: Participants should have some computer programming experience and a strong working knowledge of Excel.

Timing: This course requires 1 – 2 days, depending on the amount of material to be covered

Experts in financial
modeling training

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LEARNING TOPICS:

Using Macros in a Model

- ✓ Explore macros and Excel's development tools
- ✓ Identify activities and processes that are suitable for macros
- ✓ Learn to use the VBA Editor (ie. the Code, Project, Properties and Immediate Windows)
- ✓ Develop subroutines and the ability to organize and execute actions within Excel with well-designed VBA code
- ✓ Learn best practices for recording macros and critical edits to ensure that macros operate for subsequent users
- ✓ Build an understanding of the key elements of Excel worksheet objects used in macros such as workbooks, worksheets and ranges

Writing Code for Macros

- ✓ Design sample macros and reinforce best practices for programming robust and error-free VBA code:
- ✓ Build and audit looping techniques to perform repetitive actions and automated decision choices
- ✓ Customize Excel using VBA in order to create highly tailored solutions such as custom functions and to control the user experience with features such as user input forms, special controls and macro buttons
- ✓ Test, audit and correct macros using the debugging and error detection tools within the VBA editor

Macro Creation

- ✓ Build and test sample macros that automate common capital markets activities and give the user a chance to explore various capabilities
- ✓ Create a number of functional macros including a data scrubber, dynamic range creator, table formatting, graphing macros and automated data updates

*Learn to design, build and error check macros
to automate worksheet processes*