

INTENSIVE FINANCE SERIES

Visual Basic for Finance

EARN 14 CE HOURS



MICROSOFT OFFICE PRODUCTS like Excel, Word, Outlook and PowerPoint contain a powerful but often underutilized resource – Visual Basic. Visual Basic is part of most Office products and it gives the ability to:

- » Automate routine work and save the time and trouble of doing the same task over and over
- » Increase work efficiency by making shortcuts for common tasks
- » Customize Office products to individual needs by extending or changing those products' functionality
- » Integrate workflows across Office applications
- » Increase the “wow-factor” of developed applications

This is a practical “hands-on” workshop with a strong emphasis on delegate participation.

About this Course

This intermediate level course will show participants how to achieve these results.

The program is aimed at those who wish to support, build and enhance Visual Basic Microsoft Office applications. With a practical “hands-on” approach, each participant will work with a computer for the majority of the course on financial applications of Visual Basic.

It is expected that attending delegates will have Excel skills at an intermediate level or higher.

Participating in this workshop will equip participants to:

- » Record, play back and modify macros to automate repetitive tasks
- » Move a repository of personal macros from one machine to another
- » Deploy network accessible Add-Ins to make macros available to groups of users
- » Control security and access rights to macros and Add-Ins
- » Explain the features provided by the Integrated Development Environment that aid in the development and debugging of Visual Basic applications

Visual Basic for Finance

- » Use Visual Basic language elements to assemble complete Visual Basic applications
- » Describe how the Object Model allows the Visual Basic developer to represent and reference any of the hierarchy of objects that make up a Microsoft Office application
- » Add controls and forms to Office applications to increase their useability and user-friendliness
- » Create new functions and make them available to be used in Excel formulae
- » Intercept events and modify the behaviours of Office applications to suit individual needs
- » Define new classes which extend the range of objects accessible in Office applications
- » List the principles of good Visual Basic design
- » Demonstrate how Visual Basic can be used to integrate workflows across Office applications

Length

This is a two day workshop.

Intensive Finance Series

The Intensive Finance Series is facilitated by Alex Palfi, Principal, Tykoh Group Pty Ltd – an Australian-based training provider specialising in tailored one and two day workshops on technical finance and business topics.

Prior to setting up Tykoh Alex was a Division Director at Macquarie Group in Sydney. In that role he developed a range of finance workshops and presented those in Australia and at other international locations. Those workshops focused on financial modelling, valuation, derivatives, credit risk and Visual Basic programming.

In earlier roles Alex worked for a number of financial services organisations as a financial software developer and lectured at Technical Institutes in New Zealand in programming and electrical engineering.

Alex's university qualifications are in engineering. He obtained Masters and Bachelors degrees in Electrical Engineering from the University of Canterbury in New Zealand.

Other workshops in the Intensive Finance Series include:

- » Spreadsheet Modelling for Finance
- » Spreadsheet Skills for Finance



Day One

Macros and Add-Ins

- » Macros are a central part of Visual Basic. A macro is a set of actions within an Office Application. The action can be relatively simple: To print a page; or it can be complex. This section introduces macros: How they are created, where they can be put and how they can be shared.

Using the Visual Basic Development Environment (IDE)

- » The Integrated Development Environment (IDE) is the “Workbench” that allows development, debugging and execution of Visual Basic applications. The IDE is described and used.

Programming

- » Although macro recording is a very useful way of developing some Visual Basic applications other applications need to be written or programmed. This section describes the most commonly used statements that make up Visual Basic programs.

The Object Model

- » The Object Model is a way of representing and working with the hierarchy of objects that make up a complete Visual Basic application. Topics covered in this section include the structure and syntax of the Object Model and the behaviours and properties of some commonly used objects.

Controls

- » Controls are items like checkboxes and list boxes that can be added to worksheets to make them user-friendlier. The main control types are described and examples of their use are given.

Day Two

Forms

- » Forms extend the range of interfaces and interactions application users can experience. Both inbuilt and user-defined forms are covered.

Functions

- » Along with macros functions are a very important type of Visual Basic code. Functions provide features that macros don't. Functions, for example, are useable in spreadsheet formulae whereas macros aren't. This section describes what functions are and how they can be created and used.

Events

- » When something happens in an Microsoft Office Application that is an event. Visual Basic allows events to be modified. This allows Microsoft Office applications to be customised to suit individual needs. This section describes how some events can be detected and their behaviours extended.

Classes

- » In Visual Basic “class” has a similar meaning to the term “type”. Members of the same class all have things in common. Classes extend the “library” of Visual Basic objects that can be used in applications. The core techniques of class definition and application are illustrated.

Design Principles

- » This section reviews some principles of good Visual Basic design. The benefits of adhering to the principles are: Robust, easily extendible, clear and error free code.

Microsoft Office Integration

- » This section illustrates how Microsoft Office applications can communicate and integrate by using Visual Basic. Examples show how one Microsoft Office application can export data automatically to another Microsoft Office application.

Visual Basic for Finance

REGISTRATION FORM



Personal Details

Dr Mr Ms

Name _____ Surname _____

Position _____

Company Name _____

Address _____

City _____ State _____ Postcode _____

Country _____

Telephone _____ Mobile _____

Fax _____ Email _____

Are you an AFMA Member Yes / No

Courses

Please refer to www.afma.com.au for latest workshop dates & times.

date of course

- Visual Basic for Finance _____
- Spreadsheet Modelling for Finance _____
- Spreadsheet Skills for Finance _____

Fee per course

- Member \$2,530.00 inc GST
- Non-member \$3,168.00 inc GST

This document becomes a Tax Invoice for GST purposes upon completion and payment. Please photocopy and retain for your records.

Method of Payment

Attach cheque made payable to AFMA or provide credit card details below:

Visa Mastercard American Express Diners Club

Please note a surcharge applies of 2.75% for American Express and 3.72% for Diners Club.

Cardholder's Name _____

Total Amount \$ _____

Card Number _____

Expiry Date _____ CCV* _____

Signature _____

* 3 digit number found on the back of your Mastercard or Visa; 4 digit number found on your American Express

All enquiries and applications should be directed to:

Tel: (61 2) 9776 7914
Fax: (61 2) 9776 4488
Email: education@afma.com.au
Web: www.afma.com.au

Posted applications should be directed to:

AFMA Education & Training
 GPO Box 3655
 Sydney NSW 2001

Terms and Conditions

Payment Terms

- » For AFMA Members, invoices are issued upon enrolment and are payable within 14 days of being issued.
- » Full payment is required at the time of registration from non-member organisations.

Cancellation and Transfers

- » To obtain a full refund, delegates must notify AFMA in writing at least 10 working days prior to the program start date that they wish to transfer to an alternate program, or cancel.
- » Delegates who transfer or cancel from a program inside 10 working days from the program start date are liable for the full program fee. No refunds will be given in this instance.
- » Substitutions can be made, with prior notification to AFMA, at any time up to the program start date with no penalty

Non attendance

- » If a delegate fails to attend a program, program fees will not be refunded or allocated to another program.

General

- » AFMA reserves the right to cancel, postpone or re-schedule programs due to low enrolments or unforeseen circumstances. Full refunds or transfers will be given in this instance.
- » AFMA is not liable for any costs incurred by the attendee if the program is cancelled or postponed.
- » AFMA reserves the right to change course fees, dates, content, speakers or method of presentation at its discretion.
- » The information in this brochure was correct at the time of publication but may be subject to change.

Privacy

All personal information collected by AFMA is protected by the Privacy Act, 1988. Information collected on this enrolment form is for the purposes of processing registrations and creating and maintaining student records. Information will not be disclosed to third parties except where authorised or required by law. Please forward any enquiries you may have in relation to privacy to info@afma.com.au