

# Budget Estimating Using Microsoft Excel

**Course Number:** 5155

**Length:** 3 Days

**Primary Delivery Method:** Instructor-led live classroom

**Alternative Delivery Methods:** Instructor-led online (synchronous)

## Course Description

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Discover how to leverage Microsoft Excel to analyze budgets and finances to help ensure the accurate and timely preparation of budget worksheets. After an overview of budgeting, the rules and regulations that govern the process, and the basics of Excel, you will participate in hands-on activities to apply spreadsheet tools and techniques needed to prepare budget worksheets.

## Intended Audience

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This course is designed for budget and program analysts or financial management professionals who want to become more productive when using spreadsheets to estimate and present program needs for a federal budget submission and justification.

## Client-Provided Facility Requirements

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- 1 computer per student with Internet and Microsoft Office 2010
- Internet required for instructor computer
- Shared folders for students to share work products and access presentations/files from the instructor computer

## Course Learning Objectives

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- Navigate the Excel Ribbon
- Build a complete budget workbook using Excel, with account worksheets linked into a summary worksheet
- Apply numerous Excel shortcuts to improve productivity
- Link budget data to Microsoft PowerPoint and Word documents
- Improve worksheet design using formulas, including =IF, =VLOOKUP, and conditional formatting
- Create charts and graphs for budget presentations
- Insert budget trend lines and perform simple regression
- Prepare budget estimates using the analogy, complete enumeration, parametric, and extrapolation techniques
- Link cells, worksheets, and workbooks
- Design and produce a representative budget from a case study

## Course Additional Features

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- Producer Support
- Technical Support Team
- Dedicated In-House Accessibility/Section 508 Compliance

# Budget Estimating Using Microsoft Excel

- Student Resource Guides

All details about the Additional Features are available on this page. [Click here to Explore](#)

## Course Schedule

DAY ONE	
MORNING	Lesson 1: Budget Process and Concepts
	Lesson 2: Excel Basics
LUNCH	
AFTERNOON	Lesson 2: Excel Basics, continued

DAY TWO	
MORNING	Lesson 2: Excel Basics, continued
	Lesson 3: Excel Functions for Budget and Financial Analysis
LUNCH	
AFTERNOON	Lesson 3: Excel Functions for Budget and Financial Analysis, continued
	Lesson 4: Budget Estimating Techniques in Excel

DAY THREE	
MORNING	Lesson 4: Budget Estimating Techniques in Excel, continued
	Lesson 5: Finalizing the Workbook
LUNCH	
AFTERNOON	Lesson 5: Finalizing the Workbook, continued
	Course Exam

## Learning Methods

# Budget Estimating Using Microsoft Excel

Lecture, group discussion, class exercises, and exam.

## Credits

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### National Association of State Boards of Accountancy (NASBA)

- Field of Study: Finance
- Level: Basic
- CPEs: 24

### Professional Development Units (PDUs)

- Credits: 21

### Continuous Learning Points (CLPs)

- Credits: 24

## Third-Party Certification Relationship

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This course applies toward the DoD FM Certification Program.

## Management Concepts Certificate Program Relationship

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This is an elective course in the following program(s):

- [FFMCP Auditing Master Track](#)
- [FFMCP Accounting Master Track](#)
- [FFMCP Financial Management Master Track](#)
- [Business Analysis and Requirements Management Master Track](#)
- [Agile in Government Master Track](#)
- [FFMCP Budgeting Master Track](#)
- [Project Management Master Track](#)
- [Program Management Certificate Program](#)

## Prerequisites

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### Mandatory

- Basic knowledge of Microsoft Excel terminology and familiarity with formatting, charting, and mathematical functions

## Pework

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There is no prework required for this course.

## Requirements for Successful Completion

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Full (100%) attendance is expected and required. Successful completion of the course depends on full class attendance and active participation in individual and group exercises.

The final exam must be completed with a grade of 70% or higher.

## Follow-On Resources

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- [Program and Budget Analysis Using Microsoft Excel](#)

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## Ready to Enroll?



See the most recent course information and scheduled classes at this link:  
<https://www.managementconcepts.com/course/id/5155>



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