COURSE FEE

USD $500.00 + 16.5% GCT per person

Cost includes all course material, certificate, lunch and coffee breaks

PAYMENT AND REGISTRATION PROCEDURE

Kindly complete and return registration form and submit to info@jifsjm.org or Fax. to 876-754-5049. Send original along with full payment to JIFS **no later than Friday, November 2, 2018. Please make cheque payable to:**

The Jamaica Institute of Financial Services
VM building
53 Knutsford Boulevard
Kingston 5

CANCELLATION POLICY

Applicants will be refunded 50% of total fee paid, if their notice of cancellation is received at least 7 working days prior to the date of the programme. There will be no refund for cancellation made after, **Thursday, November 8, 2015.**

Substitutions may be made at any time.

JIFS reserves the right to cancel the programme at any time, if there is insufficient enrolment. In that event, full course fee paid will be refunded.

JIFS MISSION

The Jamaica Institute of Financial Services is committed to providing cutting-edge programmes for the continuous building of human and organizational capability in the practice of banking, investments and finance, through research and professional development of knowledgeable, ethical, proactive and customer-driven professionals.

VM Building, 3rd Floor
53 Knutsford Boulevard
Kingston 5.
Tel: (876) 754-5051/2
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Website: www.jifsjm.org

Financial Services Training Institute•Research Club•Finance Club

Financial Services Training Institute
presents

Introduction to Excel Visual Basic Application (VBA)
"Extending the power of Excel"

WORKSHOP

VBA

**November 19-20, 2018
8:30 a.m. - 4:30 p.m.**

at

**The Jamaica Institute of Financial Services
Training Room
53 Knutsford Boulevard
Kingston 5**

ABOUT JIFS

The Jamaica Institute of Financial Services (JIFS) was established as The Jamaica Institute of Bankers (JIOB) in 1977 by the Bank of Jamaica and the Commercial Banks. In 1999 the Jamaica Bankers Association (JBA) assumed full responsibility for its operations. The name change took effect in May 2010 to reflect its mandate to support the financial services industry through training (*Financial Services Training Institute*), research (*Research Club*) and social exchange (*Finance Club)*.

In its effort to prepare professionals for the global market place it has forged a number of strategic partnerships both locally and overseas. JIFS now offers the Chartered Banker MBA programme from the internationally renowned Business School for Banking (Bangor University) in partnership with the world's oldest professional Institute of Bankers (The Chartered Institute of Bankers – Scotland). It also offers certification programmes through the International Compliance Training (UK). JIFS is a service member of the Caribbean Association of Banks (CAB).

FACILITATOR

Dr Haughton is the Managing Director of a boutique financial and risk management consultancy based in the UK and the Caribbean. He holds a doctorate in mathematical computer science (from the University of Wolverhampton) a Masters diploma (achieved with Distinction) in financial strategy (from the University of Oxford) and a B.Sc. in Mathematics, Statistics & Computer Science from Teesside University.

Dr Haughton is an Adjunct Professor of Finance at UTECH and is a Fellow of the UK Institute of Mathematics & its Applications, a Certified Treasury Professional, and a Fellow of the American Academy of Financial Management (AAFM). He holds the designations of Chartered Asset Manager, Chartered Portfolio Manager, Chartered Wealth Manager and Chartered Risk Analyst of the AAFM.

COURSE DESCRIPTION

This workshop aims to introduce the programming language Visual Basic Application (VBA) and show how it might be used to further enhance productivity. The VBA language is widely viewed as the first step in software application development and participants will be shown how it can extend the power of the traditional use of Excel.

No previous knowledge of VBA or program development is assumed. However, it is assumed that delegates have a basic to intermediate understanding of finance Excel course.

All sessions will involve practical exercises (using **Excel 2010 or Excel 2013**) to be supported with case studies.

TARGET AUDIENCE

Finance Practioners
- ❖ Credit Managers
- ❖ Financial Analysts
- ❖ Portfolio risk managers
- ❖ Finance Managers
- ❖ Investment Professionals

OBJECTIVE

Participants will be exposed to:

- ❖ **Variable declarations**. The participants will be introduced to data types and how these can be defined in VBA and their purpose.
- ❖ **Control structures.** Participants will be taught how to develop programs using constructs such as if, while, for statements.
- ❖ **User defined functions/routines**. Participants will be taught how to develop their own user defined functions and use these like inbuilt Excel functions.
- ❖ **Macros**. Participants will learn how to develop macros in VBA.
- ❖ **Input/Output**. Participants will learn how to perform basic input and output to files external to Excel.

LAPTOPS ARE REQUIRED

COURSE CONTENT

Data types & Variable Declarations 1
- Identifying data types: Integer, Decimal, Double, Long, String etc.,
- Declaring variables

Operations on variables of various data types
- Manipulating numbers e.g. Integer, Decimal, Long, String etc.,
- Manipulating arrays
- Manipulating user defined data types

Control structures
- Logic behind IF, CASE and other selection statements
- Introducing loops: While, For, Do statements

User defined functions
- Introducing function statements
- Passing arguments by value or reference
- Returning single values from function calls
- Returning multiple values from function calls
- Using user defined function statements in Excel sheets

Subprograms 1
- Introducing sub-procedures
- Passing arguments by reference or value
- Outputting values to Excel cells
- Running and debugging sub-procedures from the editor

Subprograms 2/Macros
- Calling sub-procedures from other sub-procedures/functions
- Calling a sub-procedure via a button in an Excel sheet

Input and Output
- File types e.g txt, csv
- Types of access
- Reading from files into Excel
- Output data from Excel into files

Message Boxes and data control
- Designing message box for inputs
- Designing message box for outputs
- Error trapping

Recap sessions
- Data and variables declaration
- Control structures
- User defined functions
- Sub-procedures
- Input and output
- Message boxes/Error trapping

Hotel Accommodation

Participants wishing hotel accommodation should contact the JIFS directly at:
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Fax Number: (876) 754-5049
Email: info@jifsjm.org
Website: www.jifsjm.org