K2's Excel Magic - Part VII and Doc.It

Course Description

Consolidation PivotTables are used to report data that is already tabulated. For example, if a user wanted to combine divisional or departmental income statements or product line, business line, or channel profitability reports, consolidation PivotTables can be used to produce the combined reports. The only requirement is that the data layout of the individual worksheets to be consolidated is similar, but they need not be identical.

Recorded Webinar

K2's Excel Magic Part VII & Doc.It

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Learning Objectives

Upon completing this session, you should be able to:

- Create simple consolidating PivotTables
- Create calculated items in a consolidated PivotTable Dealing with grouped data
- Describe how to prepare consolidated PivotTables from non-identical data ranges
- Discuss the impact of Report Filters on consolidated PivotTables and the two options for creating Report Filters

Managing Excel Documents and Improving Workflow Efficiency

Course Description
Now that you're an Excel guru, learn how **Doc.It** helps you organize Excel documents with our Document Management solutions. In addition, we'll take a look at one of the hottest technology topics in the industry, improving workflow efficiency.

Learning Objectives
Upon completing this session, you should be able to:

- Learn how Doc.It manage Excel documents, as well as all other document types
- Learn how Doc.It helps accounting firms improve workflow efficiency and keep track of all projects
- Learn how document management & workflow software integrates with your firm's existing software (tax, accounting & bookkeeping, time & billing, etc.)

Speaker: Don Emery, CPA CA, Director of Client Solutions

Don assists customers with various issues and provides implementation consulting services to clients. Don joined Doc.It in 2009 as an Implementation Specialist and was named Director of Client Solutions in 2012. He currently leads the North America business development team.

Note Canadian registrants will qualify for 1 CPD credit. US Registrants will NOT