

Productivity Tools

*2018 Financial
Forum*

November 20, 2018





Productivity Tools

Agenda

- Your Presenter
- Excel Functions
- Excel Add-Ins
- PDF Tools
- Hyperlinks
- OneNote

Your Presenter

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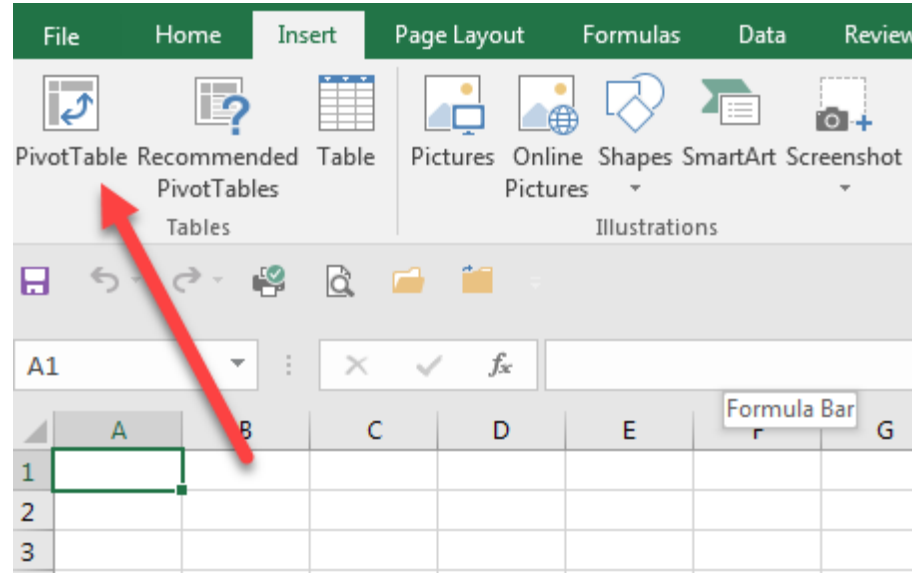
Need Help?

- Accounts Payable (Vouchers, T&E, P-Card) – aphelp@mcmaster.ca
- Accounts Receivable (Deposits & MacBill) – acctrec@mcmaster.ca
- Workflow – finworkflow@mcmaster.ca
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- Labour Distribution - sylvest@mcmaster.ca
- Research Project Statement – assadaf@mcmaster.ca
- Hyperion (Budgeting) - morronep@mcmaster.ca
- HST Related Inquiries – hst@mcmaster.ca

Productivity Tools

Excel Pivot Tables





- Allows you to reorganize and summarize selected columns and rows of data to obtain a desired report
 - Does not change the data
 - Completely flexible
 - Drillable



Productivity Tools

VLOOKUP Function

- Allows you to retrieve data from a specific column in a table
 - VLOOKUP (lookup_value, table_array, col_index_num, range_lookup)
 - VLOOKUP (what am I searching for, where is the table to find the match, which column in the table do I want to select, do I want an exact match? {false})

VLOOKUP			
Lookup_value	<input type="text"/>		= any
Table_array	<input type="text"/>		= number
Col_index_num	<input type="text"/>		= number
Range_lookup	<input type="text"/>		= logical

Productivity Tools

Excel Add-Ins

- Additional software to enhance or automate various functions in Excel
 - Common examples include:
 - AbleBits
 - ASAP Utilities

Ablebits.com

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Add-ins for Microsoft Excel

Free downloads for Excel 2016 - 2007

Printing to PDF

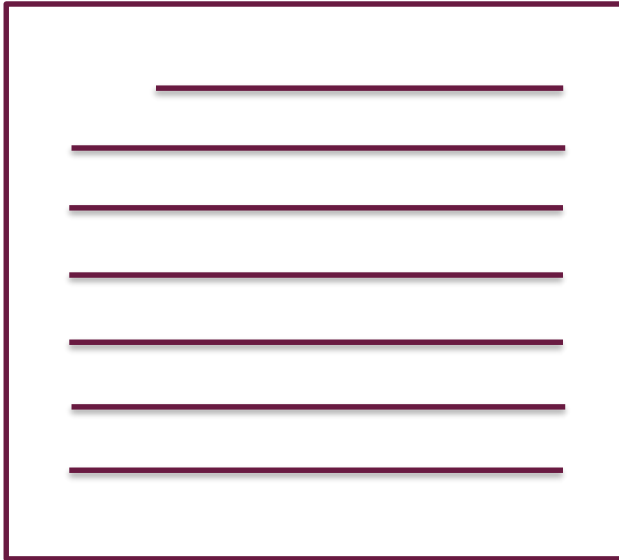
How is a PDF Created?

- Scanning using a fleet copier or a dedicated scanner
 - Useful where original electronic document is not available or where the document has hand-written annotations or signatures.
- Printing to a PDF file via a PDF printer
 - The original electronic document is needed (e.g. Excel or Word file)

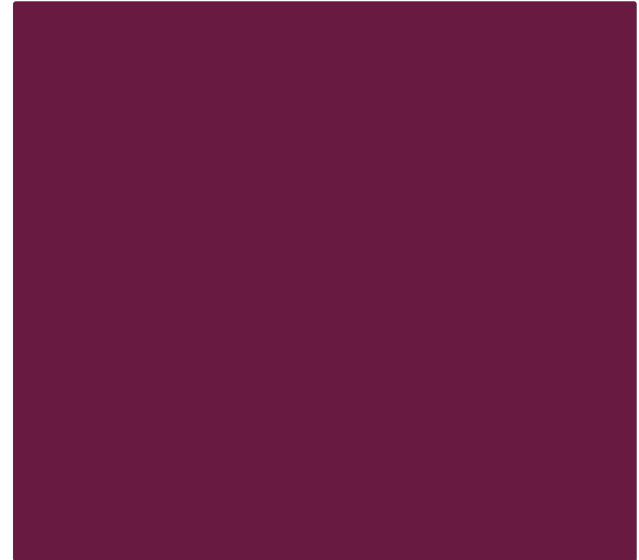
Printing to PDF

Print vs Scan

Printed to PDF



Scanned to PDF



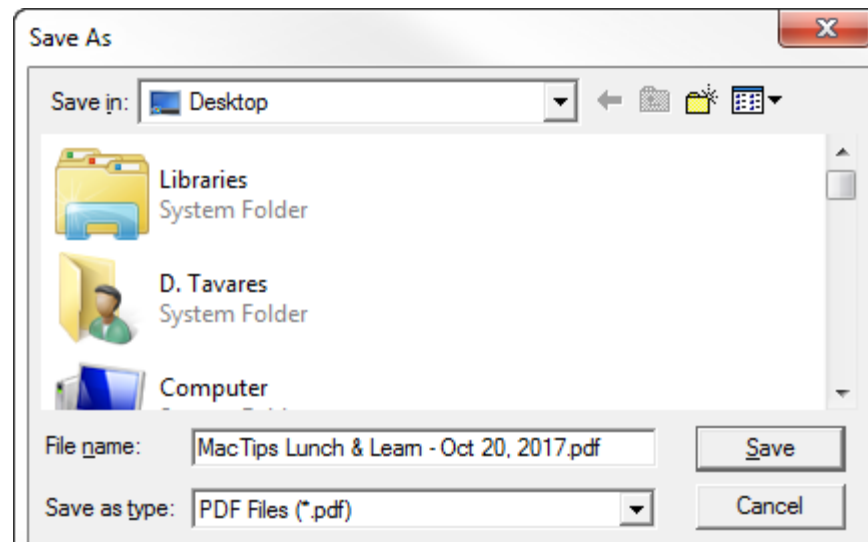
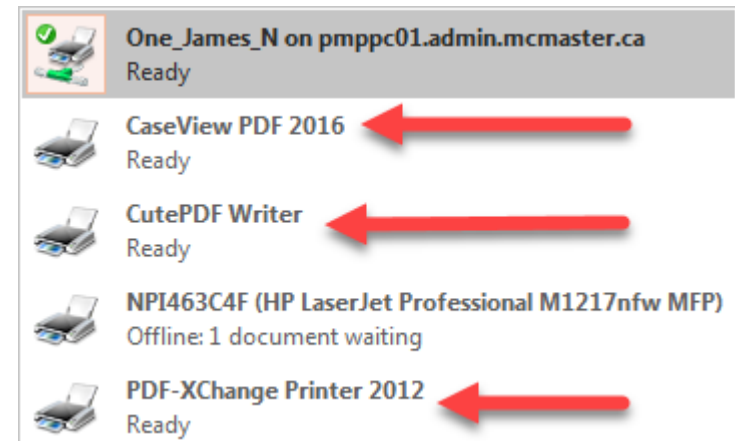
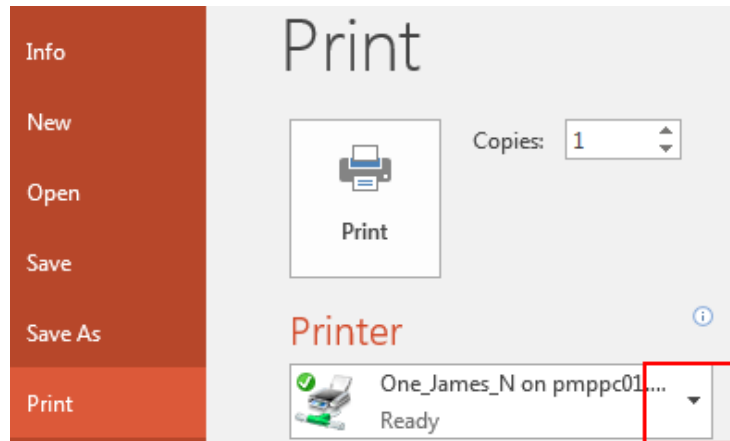
Printing to PDF

PDF Printing Options

- PDF “Printers” installed from PDF reading or editing software
 - Adobe
 - PDF X-Change
 - FoxIt
- PDF “Printers” installed directly
 - CutePDF Writer

Printing to PDF

Steps



Working With PDFs

Options (Adobe, PDF X-Change Pro, etc.)

- Insert comments
- Add text, shapes, highlighting or signatures
- Redact information
- Add, delete or extract pages
- Anything you can do by hand on a sheet of paper can be done electronically!
- Savings Per Page:
 - copier fleet charge
 - sheet of paper
 - time walking back & forth, saving emails, etc.

Sharing Files

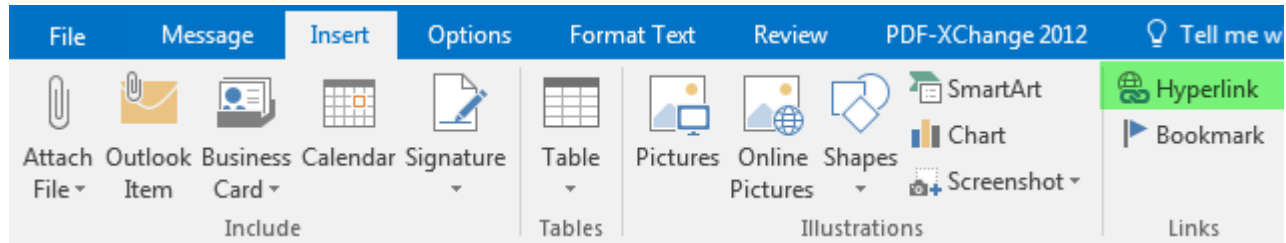
Hyperlink vs. Attachment

- A hyperlink (e.g. www.google.ca or tavard@mcmaster.ca) can also be used to specify a location of a file on a shared drive (e.g. [GL Training Presentation - v1.1.pptx](#))
- This can save digital space when sharing files
 - Original copy on network
 - Copy in sender's sent mail
 - Copy in recipient's inbox
- Disadvantages:
 - Cannot share links to people who do not have access to the shared drive
 - Difficult to view file on a mobile device (need to be connected via VPN, among other issues)

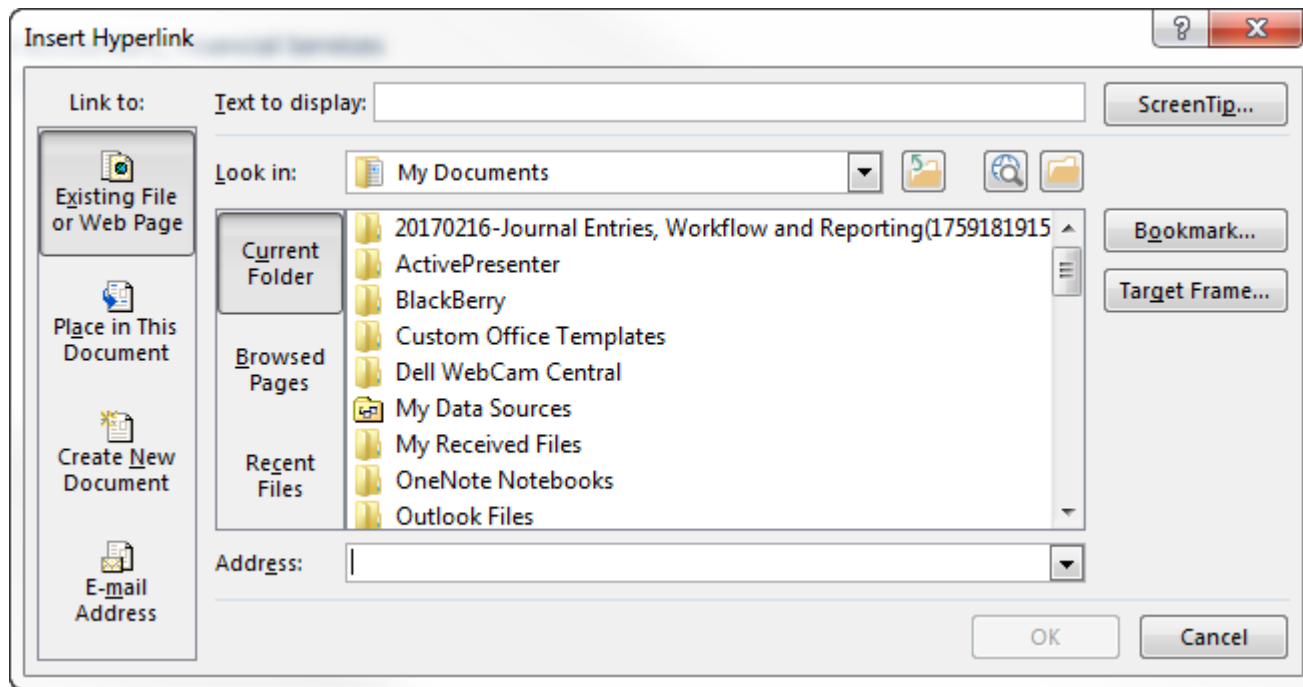
Sharing Files

Hyperlink

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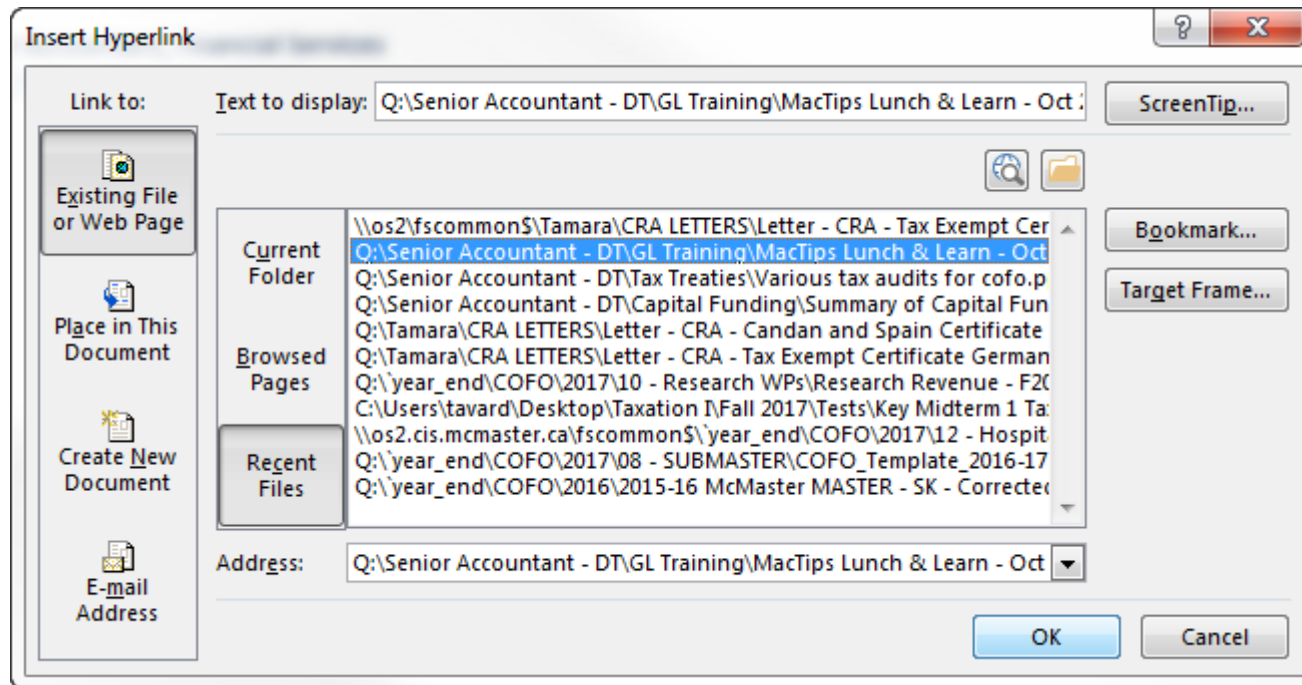
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Sharing Files

Hyperlink

3.

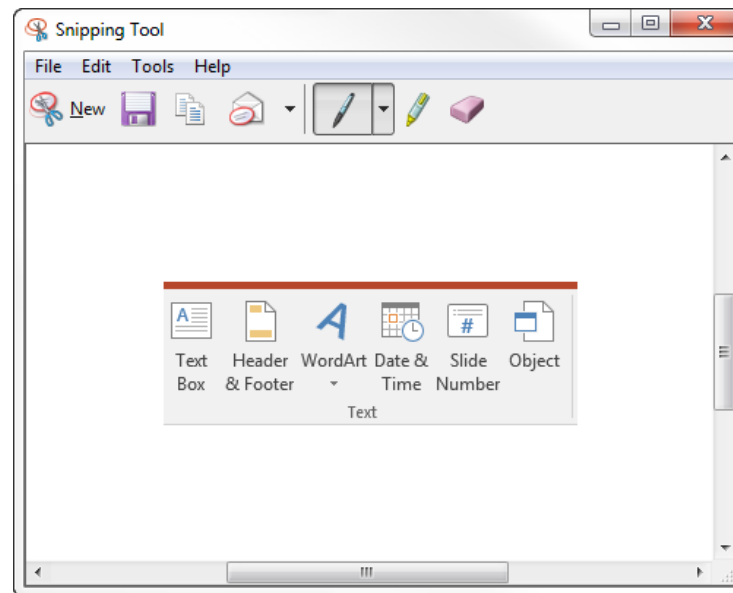
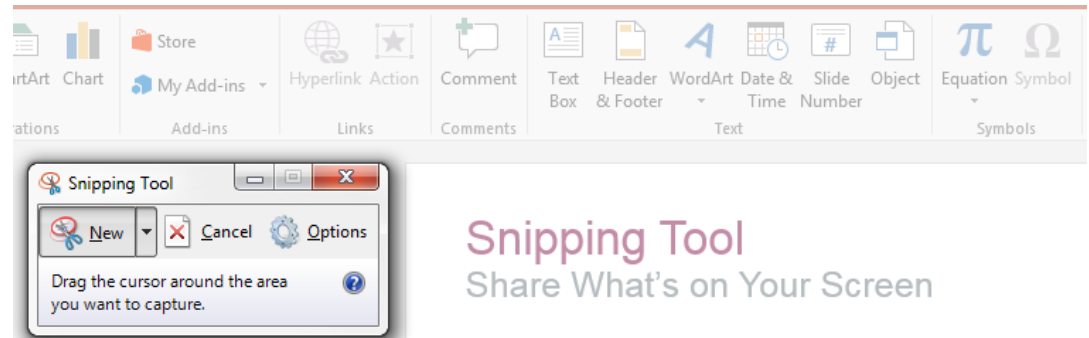
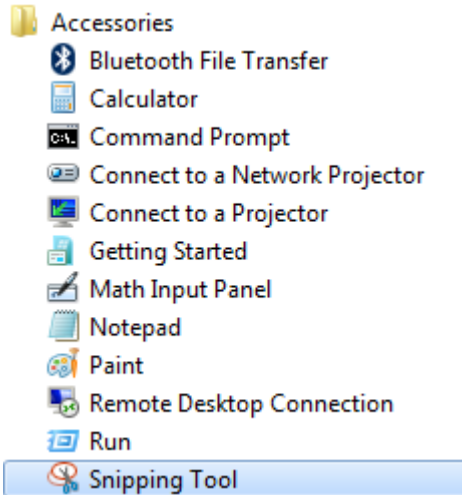


4.

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Snipping Tool

Share What's on Your Screen



Introduction to OneNote

- What is OneNote?
 - Digital Notebook
 - You can organize it by:
 - Notebooks
 - Sections
 - Pages
- Useful Features
 - Easily search anything in your notebook
 - Ability to insert attachments (excel, word, pdf)
 - Ability to insert a print out of documents (excel, word, pdf)
 - Password protect any section for security





Questions?



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