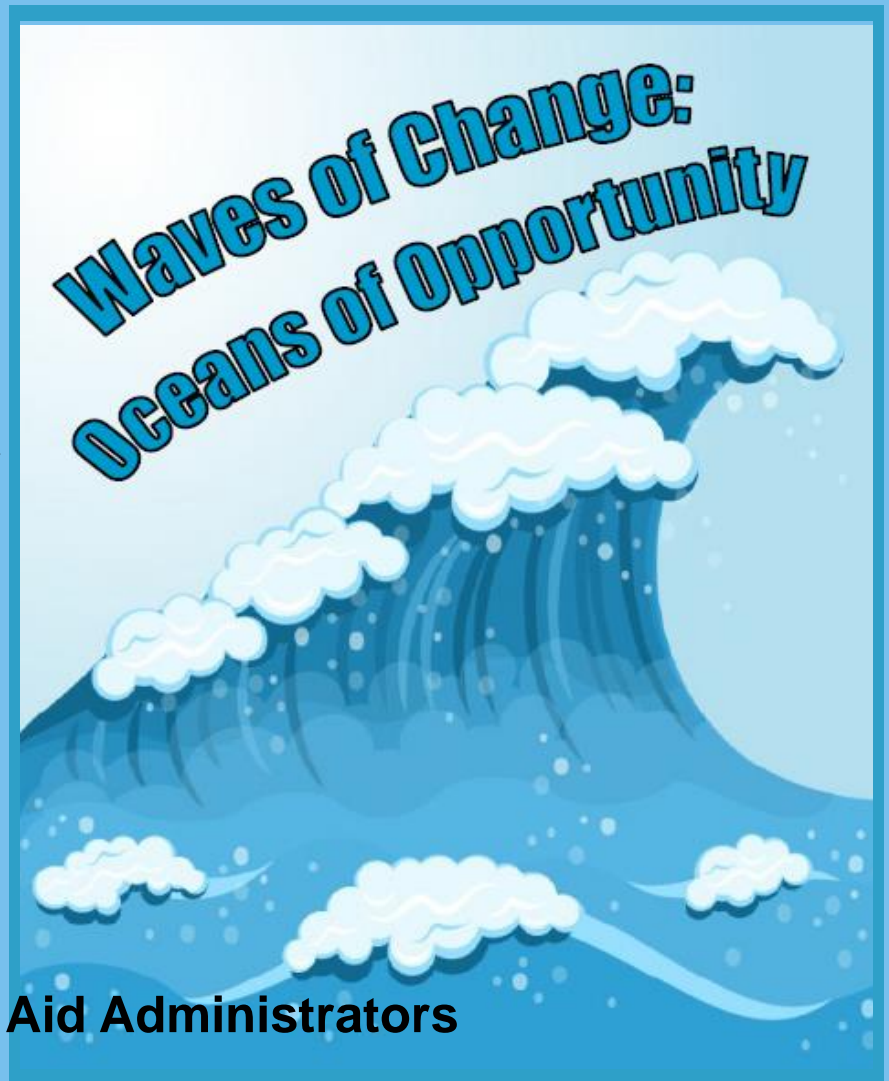


Technology Applications for the Financial Aid Office

Wes Brothers

Director of Financial Aid
Ohio Christian University



Ohio Association of Student Financial Aid Administrators
Spring Conference 2017

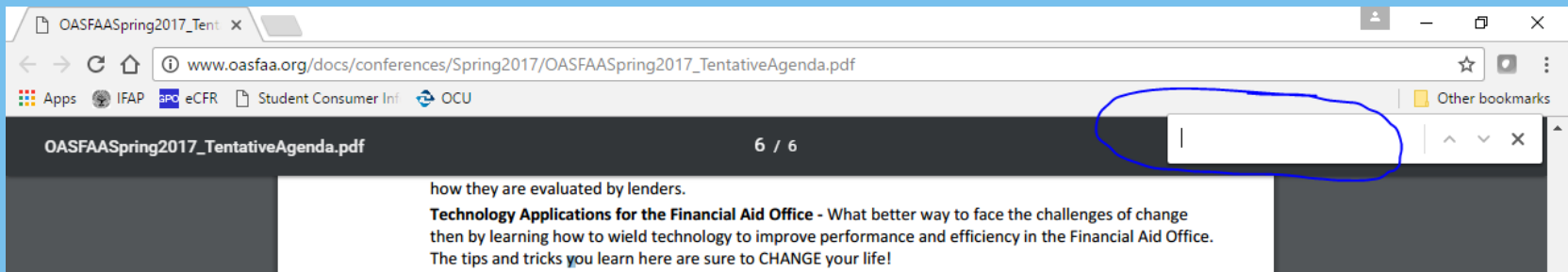
Ctrl F will change your life!



- Ctrl F Applications
 - Find what you are looking for quickly in a website or document.

How to Ctrl F

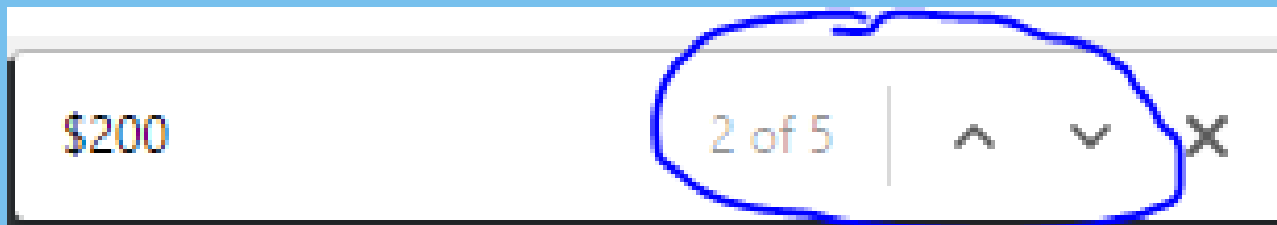
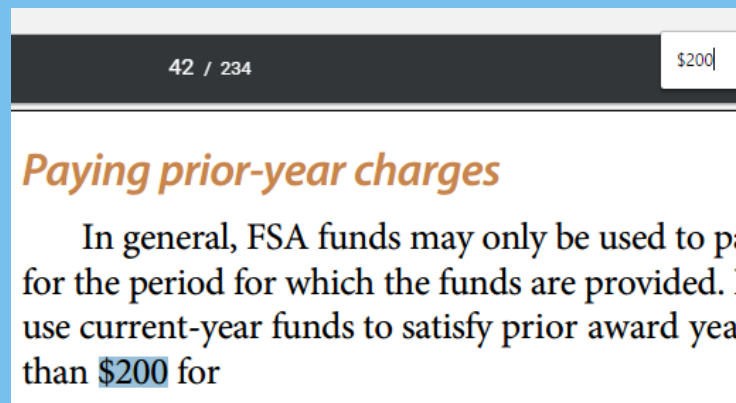
- Ctrl F
 - hold down Ctrl and F at the same time and release
 - Search window pops up in upper left hand corner



- Key to success is Key Words.
 - Use the jargon of the site or document.

Ctrl F – It Works!

- Ctrl F example
 - Type in \$200 and BOOM! Ctrl F takes you right to the page.



Other Shortcut Keys

- Ctrl A = Select All
- Ctrl C = Copy selected text
- Ctrl X = Cut selected text
- Ctrl V = Paste
- Ctrl Alt = Switch between windows



Just a couple more...

- Ctrl + = Make screen bigger
- Ctrl - = Make screen smaller
- Ctrl 0 = Make screen 100%

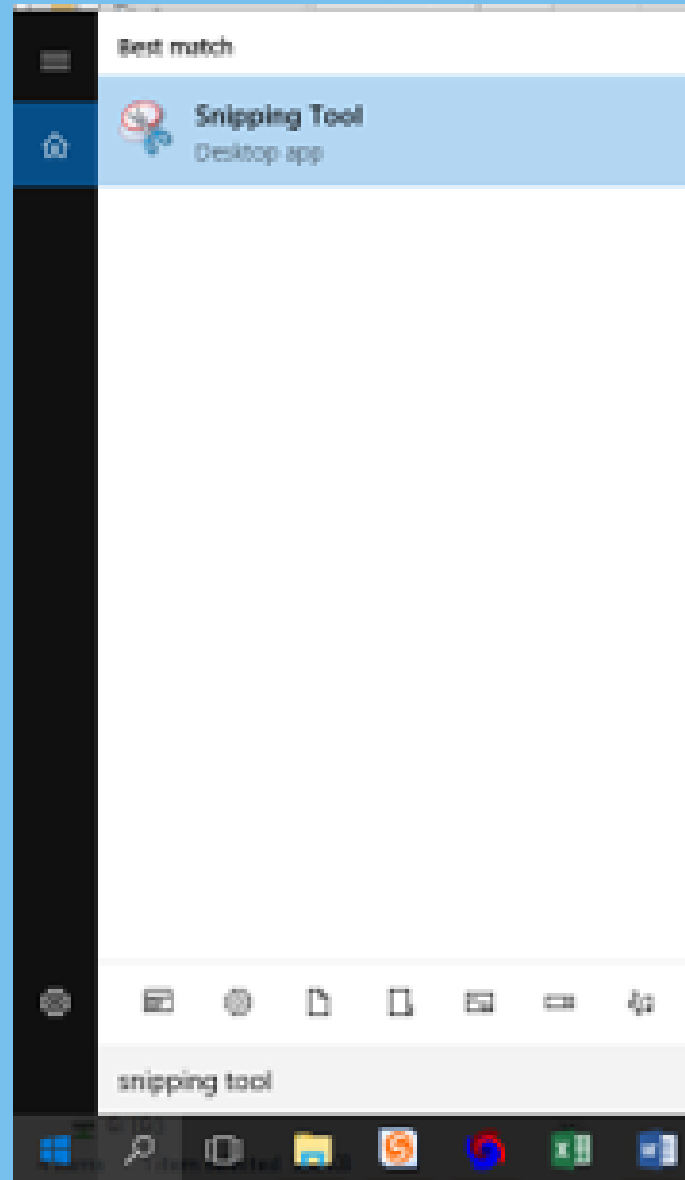
Snipping Tool



- Allows you to take a screen shot of anything and paste the image into emails, Word documents, PowerPoint presentations 😊...

Snipping Tool

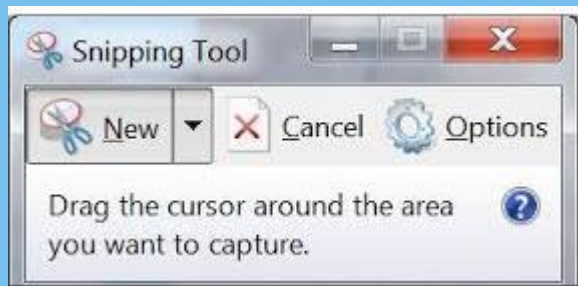
- Search in Windows to find



Snipping Tool



- Snipping Tool window pops up
- Click on New



- Hold down left mouse button and select item.
- Unclick and item is available to paste.



Screencasting

- Great tool for training staff!
- Contact your IT department to see you if you have a screencasting software.
- If not, search for a freeware screencasting software.

Top 6 Free Screencast Recording Tools for Windows

VLOOKUP will change your life!

- VLOOKUP allows you to compare same data items on different spreadsheets.

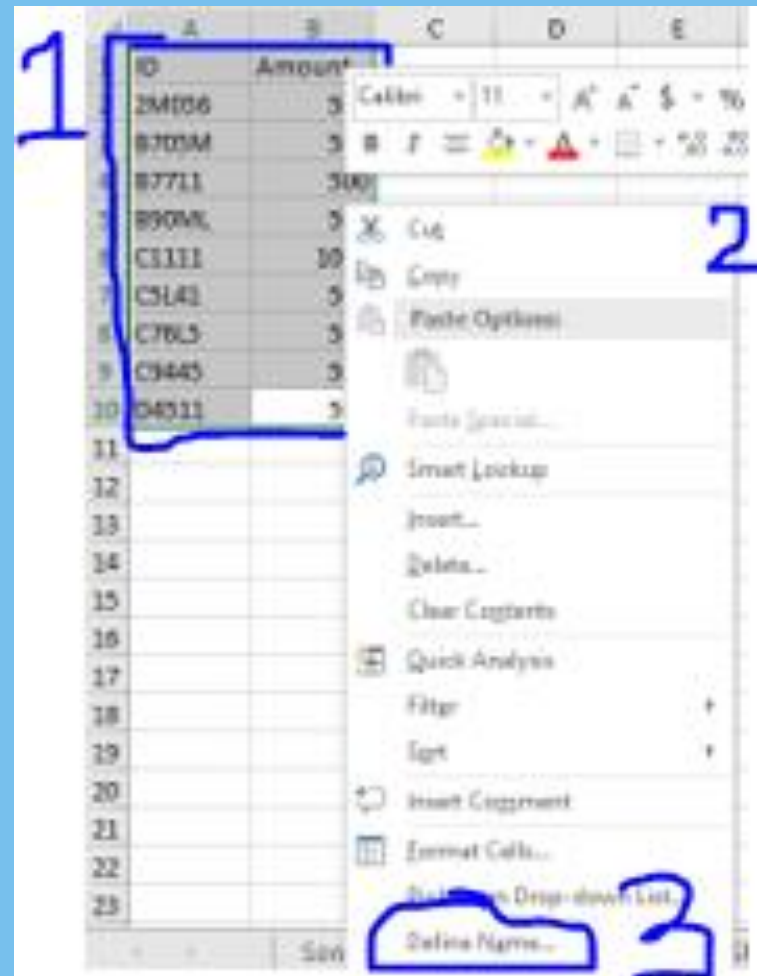


How to VLOOKUP

- With desired data open in Excel...

- Define data set

1. Select Data
2. Right Click
3. Click “Define Name”



How to VLOOKUP

- Define data set
 4. Type in Name in “Name” field and click OK

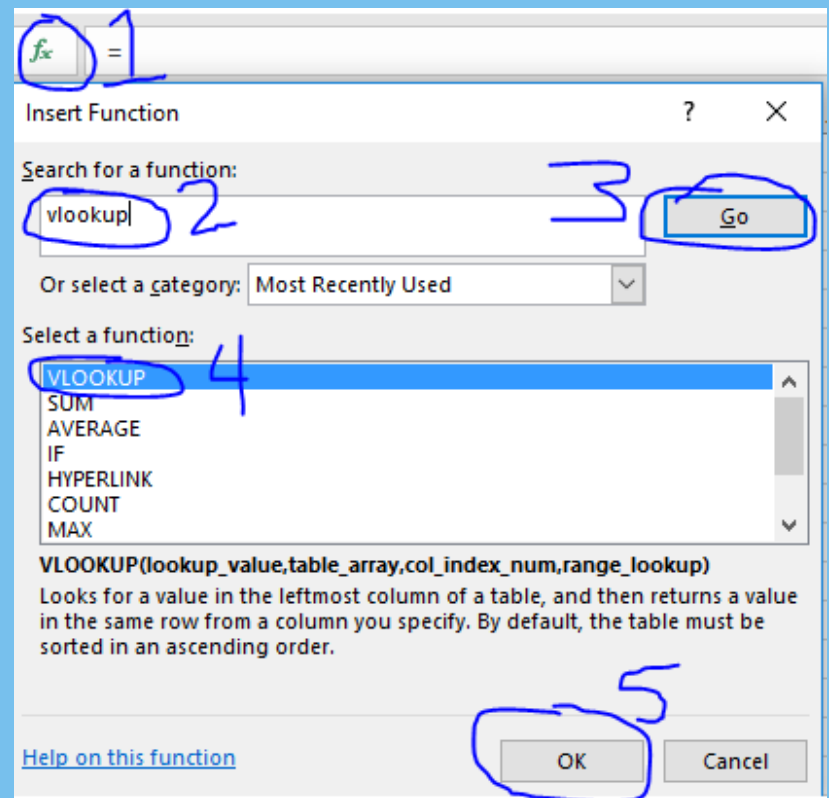
The screenshot shows the 'New Name' dialog box in Microsoft Excel. The dialog has a title bar with a question mark and a close button. It contains the following fields:

- Name:** A text box containing 'FirstDataSet'. A blue handwritten number '4' is written to the right of this field.
- Scope:** A dropdown menu set to 'Workbook'.
- Comment:** A large empty text area with a vertical scrollbar.
- Refers to:** A text box containing the formula '=1 Working Set!\$A\$1:\$B\$10'.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a blue border.

How to VLOOKUP

1. Click on fx in Excel
2. Type in VLOOKUP
3. Click Go
4. Select VLOOKUP
5. Click OK



Question to Answer

- VLOOKUP compares two data sets.
- Once the exact matched item is found, you can return data associated with that item.
- What data do you want to drop in from the one data set to the other?
- Let's look at an example...



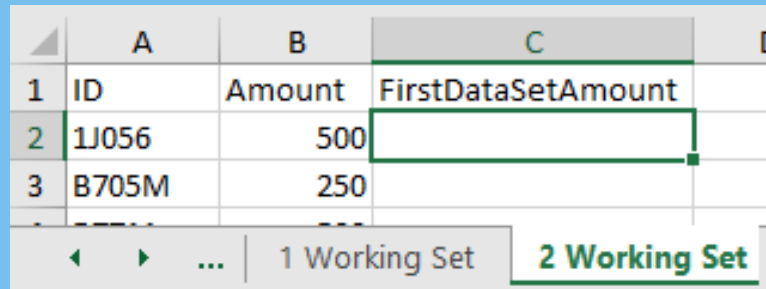
The Example

- The Issue: Financial Aid Management System (FAMS) and Student Information System (SIS) scholarship amounts for a fund do not match.
- The Goal: Identify mismatches between the FAMS and SIS.
- VLOOKUP to the rescue!



Preparing the data

- Make sure both data sets are in excel.
- Name the column where data will be returned and Click on the first cell under this heading.



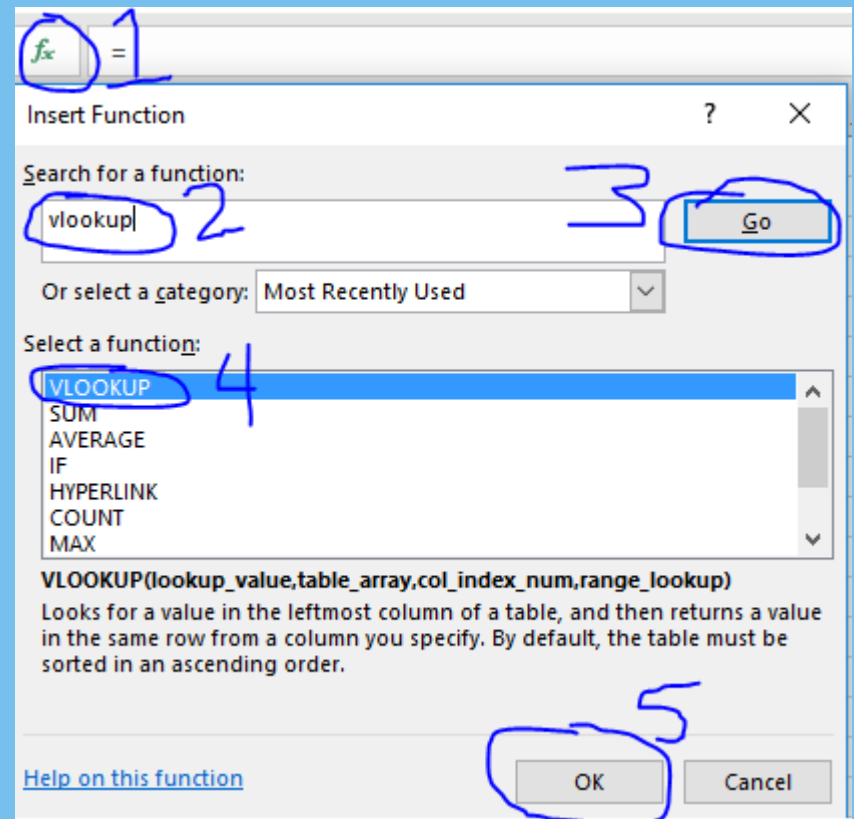
	A	B	C	D
1	ID	Amount	FirstDataSetAmount	
2	1J056	500		
3	B705M	250		

1 Working Set 2 Working Set

How to open VLOOKUP

With the cell selected, follow these steps to compare the data sets:

1. Click on fx in Excel
2. Type in VLOOKUP
3. Click Go
4. Select VLOOKUP
5. Click OK



How to VLOOKUP

- Lookup_value = Cell you want to find match for
- Table_array = Defined name of data set
- Col_index_num = Number of column that you want data from if match is found
- Range_lookup = Put false to retrieve exact match. Put true for items that are close but not exact.

VLOOKUP Example

- Example

	A	B	C	D	E	F	G	H	I	J
1	ID	Amount	FirstDataSetAmount							
2	1J056	500	VLOOKUP(A2,FirstDataSet,2,False)							
3	B705M	250								
4	B7711	500								
5	B90ML	500								
6	C1111	1000								
7	C5L41	500								
8	C76L5	500								
9	C9445	500								
10	D4511	500								

Function Arguments

VLOOKUP

Lookup_value: A2 = "1J056"

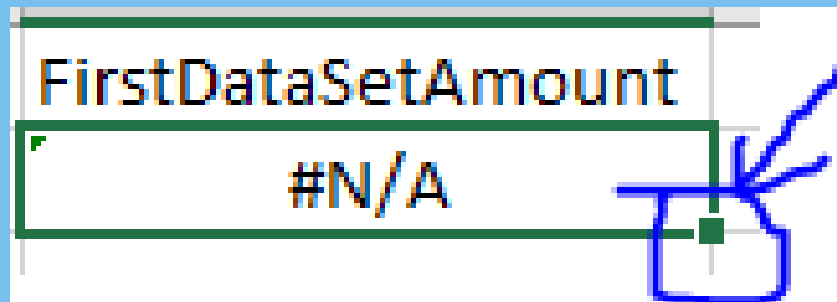
Table_array: FirstDataSet = {"ID","Amount";"2M056",500;"B705M",250;"B7711",500;"B90ML",500;"C1111",1000;"C5L41",500;"C76L5",500;"C9445",500;"D4511",500}

Col_index_num: 2 = 2

Range_lookup: False = FALSE

Copying Formula down shortcut

- Double click box in lower right hand corner to copy formula down to end of data set.



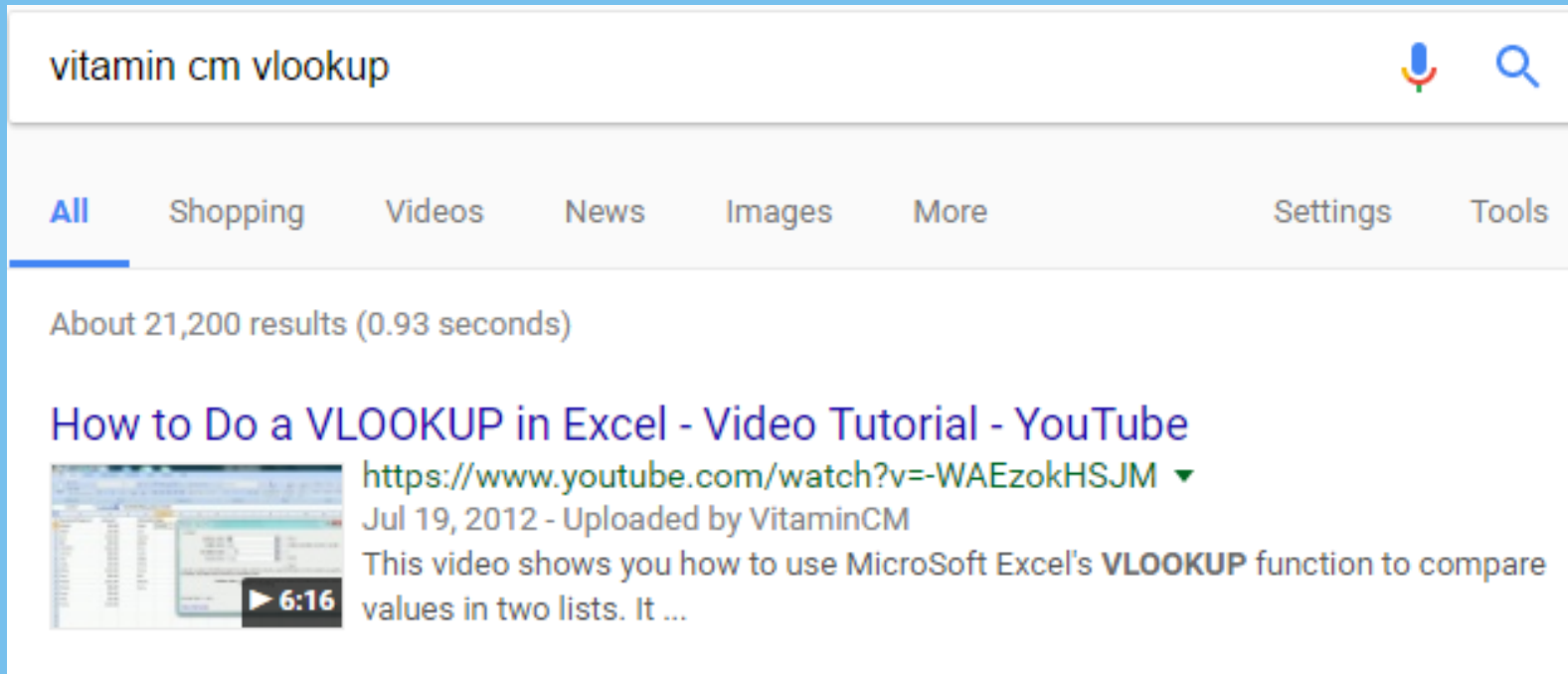
VLOOKUP Results with Notes

- Added notes to clarify issues.

	A	B	C	D
1	ID	Amount	FirstDataSetAmount	Notes
2	1J056	500	#N/A	Student not in FirstDataSet
3	B705M	250	500	Mismatch
4	B7711	500	500	Match
5	B90ML	500	500	Match
6	C1111	1000	1000	Match
7	C5L41	500	500	Match
8	C76L5	500	500	Match
9	C9445	500	500	Match
10	D4511	500	500	Match

Come again???

- I taught myself with a handy VLOOKUP video from user VitaminCM on youtube.



Time Permitting...

- We can add a Match formula to the example
- If (one cell equals another cell,”return nothing”, “otherwise return No Match”)

	A	B	C	D
1	ID	Amount	FirstDataSetAmount	Match
2	1J056	500	#N/A	#N/A
3	B705M	250	500	No Match
4	B7711	500	500	
5	B90ML	500	500	
6	C1111	1000	1000	
7	C5L41	500	500	
8	C76L5	500	500	
9	C9445	500	500	
10	D4511	500	500	

Your turn!

- Share your tips and tricks!



Sharing is caring - Meme Guy

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Questions and Info

- Questions?

- My contact info:

wbrothers1@icloud.com

740-497-7900