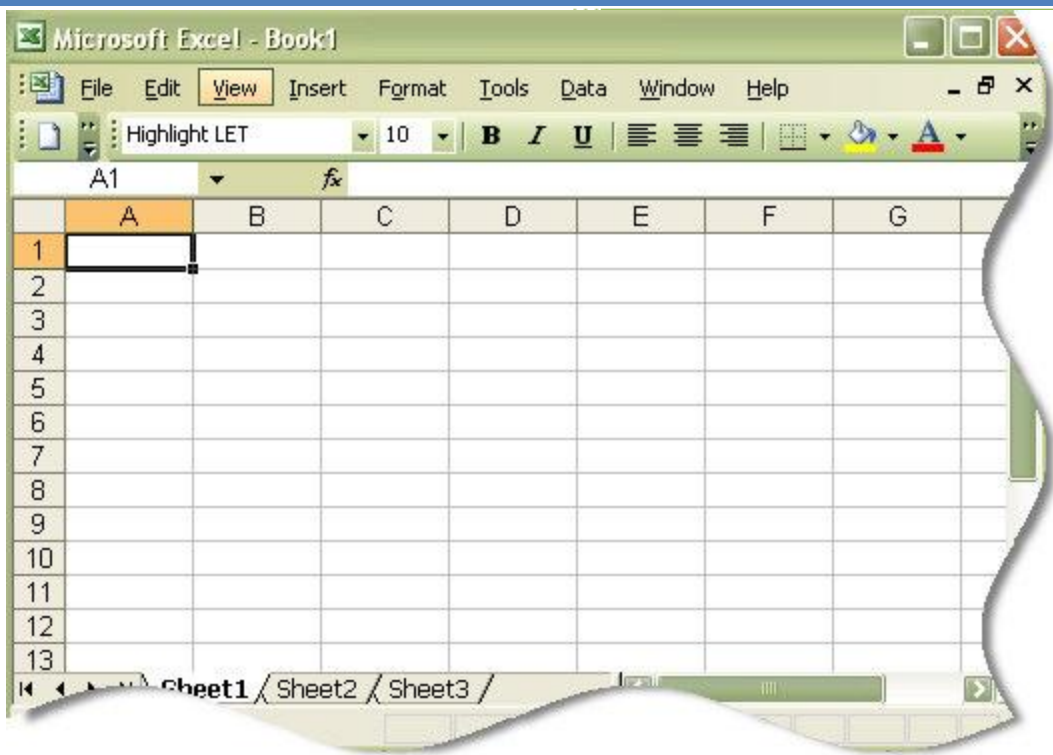


# 2009

## MS Excel Development



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# Excel Portfolio

## Flexible GAANT Chart

### Challenge

Use Excel to display a GAANT-like chart, similar to those in Microsoft Project, based off a spreadsheet containing the project’s steps and due dates. Must be flexible enough for changes in due dates.

### Solution

Using formulas to determine whether or not a date falls before the due date and then conditional formatting to color-code the results, the system can be used for any project simply by changing the dates and objective names.

| Document Title  | Legend | Overdue | In Progress, Waiting on Someone Else, Deferred | Not Started | Completed | Current Date | Date   |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
|---|--------|---------|--|-------------|-----------|--------------|--------|--------|--------|--------|--------|--------|--------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--|
| Task  | 15-Feb | 16-Feb  | 17-Feb   | 18-Feb      | 19-Feb    | 20-Feb       | 21-Feb | 22-Feb | 23-Feb | 24-Feb | 25-Feb | 26-Feb | 27-Feb | 28-Feb | 1-Mar | 2-Mar | 3-Mar | 4-Mar | 5-Mar | 6-Mar | 7-Mar | 8-Mar | 9-Mar |  |
| Style Guide   |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Finalize folder structure for Proposal Preparation area   |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Management Review/Planning Meeting                        |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Dedicated search engine for project experience            |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Facilitate finding the PMC from rest of GI.               |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Health & Safety proposal info                             |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add link to US & Australia SOQs                           |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add new material from BC                                  |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Define Sectors and Services for Project Experience        |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Define structure for folders                              |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Structure and layout Home Page                            |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add Link to listing of Document Review Group Team for GAL |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add Quality to Project Management bucket                  |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Address the gaps in region documentation                  |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Step 12   |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| 'Who can help' contact list                               |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Purpose Statement for Site Home Page                      |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Cost Estimate and Contract buckets                        |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add new material from Ontario                             |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add New Material from Market Sectors                      |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Add Brochures (2-4 pagers) to PMC Promotion               |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Proposal Contact List                                     |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Sample RFP Checklist                                      |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |
| Step 17   |        |         |  |             |           |              |        |        |        |        |        |        |        |        |       |       |       |       |       |       |       |       |       |  |

### Benefits

This system completely satisfied the goals of the client. By using an automated system of formulas and conditional formatting, users no longer had to bother colour-coding each step manually, leaving opportunity for a disconnect between the stated due date and the one displayed on the chart.

## ***Accounting Package***

### **Challenge**

Design an accounting package complete with invoicing, A/R, A/P, Bank Rec.

### **Solution**

The inclusion of a client list was a solution that vastly increased the productivity of the system. Using data validation, the client list allows the user to select the name of the client on the invoice and have Excel automatically insert the remaining billing information. Macros were developed to aid in transferring invoicing data to the Accounts Receivable form. Conditional formatting combined with date calculations allow for determining which accounts are overdue at-a-glance.

### **Benefits**

The above, along with a wide variety of other enhancements, form a package in which all the client's accounting needs are stored in one workbook.