

Microsoft Office Tips and Tricks

The Academy of Teaching & Learning Excellence





Outlook

1. **CTRL+K** – Search the address book more narrowly by typing the last name (or a first name, if sufficiently unique) and hold CTRL and press K. It will narrow the list substantially.
2. **Scheduling Assistant** – You can view the busy and open times of anyone at USF, even if they haven't shared their calendar with you. Just create a meeting message to that person and click "Scheduling Assistant" in the top navigation.
3. **Calendar "all day event" Meetings** – Avoid using the "all day event" tickbox when creating appointments and meetings – such items do not properly show you as "busy" to anyone using Scheduling Assistant to view your availability. Instead, create your meetings or appointments to start at 8am and end at 5pm manually.
4. **Calendar Color Coding** – It can be helpful to color-code certain recurring meetings. Click "Categorize" in the top navigation, then click "New" and name the category (for example, if always meeting a co-worker at this time slot, use the co-worker's name). This category can be used for subsequent meetings or appointments as well.
5. **Create a Mailing List Group** – In the Home tab of your Inbox, click "Address Book" near the top-right. Find the pulldown menu under "address book" and select Contacts. Click "file" and then New Entry, and select "New Contact Group". Next, name the group. Click "Add Members" at the top and select "From Address Book". Make sure the address book pulldown has "Offline Global Address List" selected, and type a last name to the left of the Go button, then click Go. You must *double-click* on the desired person before the OK button lights up. Click OK. Repeat as necessary and click Save & Close at the top to finish.
6. **Folders and Searching** – Moving items out of the Inbox creates a smaller list of still-undone items (anything left in the Inbox still needs addressing). Right-click on your email account on the left-side navigation and select New Folder, and name it "Saved". Right click on the Saved folder to create a new (sub) folder, and replicate until you have a folder structure that makes sense to you. Move items out of the inbox and into these folders after you've addressed/answered those emails (as needed). Searching is now easier, since you can click into a saved folder before initiating a search for a keyword.
7. **Rules, Junk Mail, and Blocks** – To prevent an unwanted sender from continuing to email you, right click on the email in the inbox and select "Junk" and then "Block Sender." You can also right-click to create a rule to move emails with a certain keyword, or from certain senders, directly to the "Deleted Items" folder. Note: it can also be valuable to create a Rule to automatically move emails to a subfolder that you DO want to keep, but only want to check infrequently, so that they don't clutter your inbox.

PowerPoint

8. **B or W buttons** – You can temporarily blank the screen mid-presentation by clicking B (for black) or W (for white). Pushing the same button again will toggle it back to the presentation.
9. **F5** – Start the presentation without finding an icon on screen; simply click F5.
10. **Shift + F5** – Starts the presentation on the slide currently selected (while editing).

11. **Jump to slide number** – If you have a key slide (say, slide 19), you can jump to it at any time by typing those numbers and then pressing ENTER while anywhere else in the presentation.
12. **Bulk-adding photos, one per slide** – To add one photo per slide, click INSERT and then Photo Album to select photos.
13. **Narrated slideshow screencast** – Under the Slide Show tab, click Record Slide Show to add audio to existing slides. If saving for YouTube, click “Save As” under File and switch to filetype .wmv
14. **Slide Design** – use a pre-packaged design theme to keep formatting consistent. If you need to make changes to the basic fonts, title or text box placement, or other elements, consider doing it on the Master Slide so that those changes will automatically apply to all slides.
15. **Photo Editing** – if you don’t have Photoshop, PowerPoint can be a pretty good option for most editing needs. These features are also available in Word. Here’s a bit of what they can do. For all photo editing, click on the photo, then select the Format tab to bring up the menu with tools discussed below. Also see: <https://www.havain.fi/photo-editing-in-powerpoint/>
 - a. **Resizing** – keep image proportions by dragging from the corners to adjust image size.
 - b. **Removing picture backgrounds** - both PowerPoint and Word have a tool to remove the background from an image to create a transparent background. Select the image, then in the Format tab click on “Remove Background”. Office will identify what it thinks is background and color it bright pink. You can make adjustments to refine the selection by selecting “Mark Areas to Keep” or “Mark Areas to Remove” and clicking on the relevant areas of the image. The background of the image below (left) was removed to create the second image with a transparent background that could be placed on top of any new background or photo (image three). Backgrounds that are quite different in color from the subject tend to be easier to remove.





 - c. **Rotating** – rotate or flip an image to face the desired direction using the rotate arrow, or create a mirror image by flipping it horizontally or vertically (image above right).
 - d. **Cropping** – remove parts of an image; the entire image is saved so you can always go back and change the cropping. You can also crop to other basic shapes, not just a rectangle.
 - e. **Image effects** - Add color tints and adjust image saturation (including black & white) inside your PowerPoint presentation.
16. **WordArt** – fancy text effect like shadow, 3-D rotation effects, and reflection add more than just color options to your graphics.
17. **Grouping** – if you are using PPT as Photoshop-lite to create basic graphics and manipulate images you’ll find the grouping and bring to front/back useful (since it lacks the functionality of layers). Select the items and right click to bring up these options.

Excel

18. **Freeze panes** – One of the most useful features in Excel is the ability to continue displaying the “headers” as you scroll down through a spreadsheet. Highlight the line below the headers by clicking on the “2” itself, then click VIEW → Freeze Panes (menu) → Freeze Panes.
19. **Protect function** – Prevent unwanted entering of data by locking certain cells (this is especially useful to let a coworker enter data but not accidentally adjust formulas). To start, select the editable cells, the right click to Format Cells, go to Protection, and deselect “Locked.” Then, click Review → Protect Sheet and click OK, leaving the defaults alone. Official help file: <https://support.office.com/en-us/article/protect-a-worksheet-3179efdb-1285-4d49-a9c3-f4ca36276de6>
20. **Duplicate formulas** – You can save time by “spreading out” a formula to the rest of the column. Create the formula for the top line of your data/table, then hover the mouse over the bottom-right corner of that cell, such that the cursor turns into a black + sign. Left-click and “drag down” the cursor, and the formula will propagate downward, automatically adjusting for data on each line.
21. **Duplicate data +1** – to have your data add an incremental 1 to each new line, hover the cursor over the bottom-right of the initial cell, then hold CTRL and drag the cursor downward.
22. **Remove duplicates** – You can automate the removal of identical data (such as faculty names or email addresses) by highlighting the cells, then click Data → Remove Duplicates
23. **Creating Graphs** – Select the cells needed, then click Insert and select the type of chart you want. Official help file: <https://support.office.com/en-us/article/create-a-chart-from-start-to-finish-0baf399e-dd61-4e18-8a73-b3fd5d5680c2>
24. **Autosum** – You can add up the selected cells by clicking the autosum icon, which looks like a stylized capital “E” near the top-left in the Home tab.
25. **Formulas: IF statement** – You can ask Excel to perform certain operations based on an “if” condition. For instance, in a selected cell, you can have the cell display “YES” if the sum of other cells is more than 50, or “NO” if the sum is less than 50. The syntax would be: =IF((C2+C3)>50, "YES", "NO"). Official help file: <https://support.office.com/en-us/article/if-function-69aed7c9-4e8a-4755-a9bc-aa8bbff73be2>
26. **Formulas between tabs** – You can display a formula’s result on another tab using this logic: =IF(Sheet1!C2+C3>50, "YES", "NO") – where “Sheet1” would display whatever you have named that sheet. Official help file: <https://support.office.com/en-us/article/sheet-function-44718b6f-8b87-47a1-a9d6-b701c06cff24>
27. **VLOOKUP** – This sort of table enables you to examine multiple ranges and return onto the selected cell just the one corresponding answer; an example might be grade distributions (90-100; 80-89, etc) and the corresponding letter grade in the table (A, B, etc). The VLOOKUP code references the entire table when looking at multiple student scores and returns just the letter grade. Official help file: <https://support.office.com/en-us/article/vlookup-function-0bbc8083-26fe-4963-8ab8-93a18ad188a1> , or see this grades example: <http://www.excel4business.com/excel-blog/articles/vlookup-for-changing-percentages-to-letter-grades.html>
28. **Pivot tables** – You can re-order, analyze, and present your data in various ways using pulldown menus if you create a pivot table. These are more advanced than casual formulas and require more investment of time to learn the steps. Official help file: <https://support.office.com/en-us/article/create-a-pivottable-to-analyze-worksheet-data-a9a84538-bfe9-40a9-a8e9-f99134456576>

Household expense data

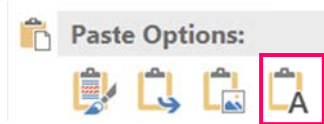
	A	B	C
1	MONTH	CATEGORY	AMOUNT
2	January	Transportation	\$74.00
3	January	Grocery	\$235.00
4	January	Household	\$175.00
5	January	Entertainment	\$100.00
6	February	Transportation	\$115.00
7	February	Grocery	\$240.00
8	February	Household	\$225.00
9	February	Entertainment	\$125.00
10	March	Transportation	\$90.00
11	March	Grocery	\$260.00
12	March	Household	\$200.00
13	March	Entertainment	\$120.00

Corresponding PivotTable

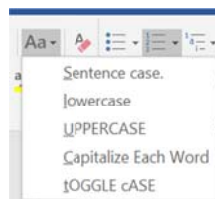
AMOUNT	MONTH			
CATEGORY	January	February	March	Grand Total
Entertainment	\$100	\$125	\$120	\$345
Grocery	\$235	\$240	\$260	\$735
Household	\$175	\$225	\$200	\$600
Transportation	\$74	\$115	\$90	\$279
Grand Total	\$584	\$705	\$670	\$1,959

Word

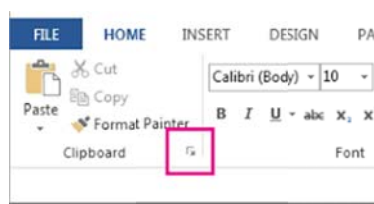
29. **Hot Keys** – CTRL+X (Cut), CTRL+C (Copy), CTRL+V (Paste), CTRL+Z (Undo) - save tons of time! Also try CTRL+S (Save), CTRL+B (Bold), CTRL+U (Underline), CTRL+I (Italics), CTRL+Y or F4 (Repeats last action).
30. **Copy and paste different sections of text simultaneously** - (CTRL+ select text, CTRL+ select text, CTRL+ select text, Copy, Paste).
31. **Paste Without Formatting** – ever copy text from one document or webpage to another and bring along some unwanted font or odd formatting? To paste without formatting, copy as usual, right-click where you want to paste and select the icon of the clipboard with the letter A from the “paste options” menu (see image below). The other paste options are (from left to right): keep source formatting, merge formatting, or paste as a picture.



32. **Capitalization Changes** – click on the capitalization icon in the Home menu (see below) to quickly change between lowercase, uppercase, sentence case, or capitalize each word (for titles, be aware that you’ll have to manually go back and change prepositions to lowercase).



33. **Clipboard** - allows you to copy up to 24 items from Office documents or other programs and paste them into Word (or another Office document) either all at once or one at a time. Activate



clipboard from the Home menu (see below). <https://support.office.com/en-us/article/copy-and-paste-using-the-office-clipboard-714a72af-1ad4-450f-8708-c2931e73ec8a?ui=en-US&rs=en-US&ad=US#top>

34. **Quick Styles** – if you create the same style document over and over, save key style features for quick formatting - <https://support.office.com/en-us/article/video-using-styles-in-word-9db4c0f4-2754-4294-9758-c14a0abd8cfa?ui=en-US&rs=en-US&ad=US>
35. **Automatic Formatting** – sometimes Word autocorrects in a way that is just plain annoying. Turn on or off specific autoformat elements to take back control. <https://support.office.com/en-us/article/choose-autocorrect-options-for-capitalization-spelling-and-symbols-e7433b94-f3de-4532-9dc8-b29063a96e1f>
36. **Show Formatting** – if you're wondering why your formatting isn't showing up right click on the "show formatting marks" icon (below) to see what Word is really doing to your document. <https://support.office.com/en-US/article/Show-or-hide-formatting-marks-c2d8a607-5646-4165-8b08-bd68f9d172a0>



37. **Compare/Combine Docs** – if you need to compare different versions of a document there are several options depending on your needs. If you have multiple people editing a document it is generally preferable to have them make edits in "track changes" mode (found in Review tab).
 - a. View Two Docs Side-by-Side for Comparison – open two docs and select via the View tab, in the Window menu. <https://support.office.com/en-us/article/view-and-compare-documents-side-by-side-52445547-7c07-475b-bb1d-22a98175ef04?ui=en-US&rs=en-US&ad=US>
 - b. Combine documents - word opens a new document that combines the original document and the copy you merged in (found in Review tab). Any differences are shown in tracked changes. <https://support.office.com/en-us/article/combine-documents-f8f07f09-4461-4376-b041-89ad67412cfe?ui=en-US&rs=en-US&ad=US>
 - c. Compare documents - displays only what changed between them (found in Review tab). The documents that are being compared are not changed. The legal blackline comparison is displayed by default in a new third document. <https://support.office.com/en-us/article/compare-document-differences-using-the-legal-blackline-option-dbf7351-4022-43a2-a0c4-54d1898702a0>
38. **Real-time Edits and Collaboration** – for colleagues within USF, create a Word online document via OneDrive and "share" the document with collaborators (share is found in the upper right hand corner). For colleagues outside of USF consider using a Google doc.
39. **Find and Replace** – a quick way to check and correct mistakes throughout the document, or to remove those pesky double spaces after a period. Find and Replace are in the editing menu of the Home tab. For the double spaces, place your cursor in the Find what field, then press the Spacebar twice to insert two spaces. Place your cursor in the Replace with field, then press the Spacebar once.
40. **Recover Lost Docs** – from the File tab, click on the Manage Document button and select Recover Unsaved Documents to retrieve that doc you were working on when the power went out.

41. **Table of Contents** – for longer documents a table of contents helps the reader navigate, looks impressive, and is super easy to add. Make sure to use headings and subheadings (in Home tab under styles) for the different sections you want to appear in your TOC. Generate the TOC by clicking Table of Contents under the References Tab. Word will add the TOC to your document. You can edit its content as wish and regenerate the TOC anytime you make changes to the document. <https://support.office.com/en-us/article/create-a-table-of-contents-in-word-882e8564-0edb-435e-84b5-1d8552ccf0c0>
42. **Set up grammar check** – (File, Options, Proofing, Writing style, Settings).
43. **Insert hyperlinks or a video** – <https://support.office.com/en-us/article/create-or-edit-a-hyperlink-in-office-for-mac-68968ad1-a64d-4149-b814-59050e3a9c60>
44. **Insert Picture in front of text** – (Go to Layout, Wrap text, In front of text): <https://www.gcflearnfree.org/word2010/inserting-clip-art-and-pictures/2/>
45. **Format Painter** – (to copy format of text to another text- Select text you want to copy format from, Click Format Painter once (Under Home button), select text you want to copy format. Click Format Painter twice to keep using the Format Painter for the whole document. Press Esc when done. <https://www.youtube.com/watch?v=-ITX7bM7PC8>

Mail Merge

46. Mail merge allows you to create and print a batch of personalized letters, emails, mailing labels or envelopes. This is helpful for creating name tags, certificates, and personalized mass emails.
 - a. The process involves three documents: the main document (which contains text, graphics, or images that are identical to all versions of the merged document), the mailing list (which contains the data for the main document), and the merged document (which is a combination of the main document and the information pulled from the mailing list).
 - b. Mailing list—you can use an Excel spreadsheet, a Microsoft Outlook Contact List, or a Word data file (with a single table).
 - c. Once you have your main document definitive, you will go under Mailings and click on Start Mail Merge. Here you will have the option to select whether you want to generate letters, email messages, labels, etc.
 - d. If you chose to create labels, you will have to select a product number (ex. 5392 Name Badges Insert Refills).
 - e. Your next step is to select recipients (your mailing list). Select Use an Existing List. Click Open Data Source. On the next page, make sure you select First row of data contains column headers.
 - f. Your next step will be to go back up to the Menu and select Insert Merge Field; here you can select in what order your options might appear. For instance, you might wish for the first name to appear first on the label and to be in a different font size or color. In order to edit these you will need to use the options under the Home tab. You will also have to space out the inserted merge fields to your preference.
 - g. You will then return to the Mailings tab and click Update Labels, Preview Results and finally Finish and Merge.
 - h. You now have your merged document which you can choose to edit, print, or send as an email.
 - i. Click here for detailed Microsoft tutorials of all mail merge options: <https://bit.ly/2luHL4Y>

