



Office

W X P O N

Making Your Life Easier

Presented by:
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 Curtis Blakely & Co., PC

Office 365

- Online version of Word, Excel and PowerPoint
- 1TB of Storage and sharing in One Drive
- Sway Presentation Creator
 - Online presentation creator
 - Build Sway from MS Word
 - Save data from One Drive to Sway
 - Pull in Web Content
 - Search
 - Youtube
 - Flickr
 - Tweets
 - Let it build it's content based on what you have already entered
 - Sway can be used for free with a MS Live account

Office 365

- 99% Guaranteed Uptime (This will vary depending on your environment as well)
- Data Security (set up security when sharing files)
- Active Directory integration for user permissions
- Contains some features not available in desktop version of Office
 - Designer, Morph and Zoom for PowerPoint
 - Researcher and Editor for Word
 - New Charts in Excel (Maps and Funnel Charts – These are available in Word and PowerPoint as well)



What upper Tier 365 gives you

- Full desktop applications (Word, Excel, OneNote & Publisher) up to 5 computers per user, 5 phones, and 5 tablets
- Full Office on Tablet or Mobile device
- Outlook w/ 50GB inbox
- Sharepoint
- Skype for Business
- Yammer (Corporate Social Network)
- Compliance Protection (Encrypted email, Data loss prevention)



Office 2019 Speculation

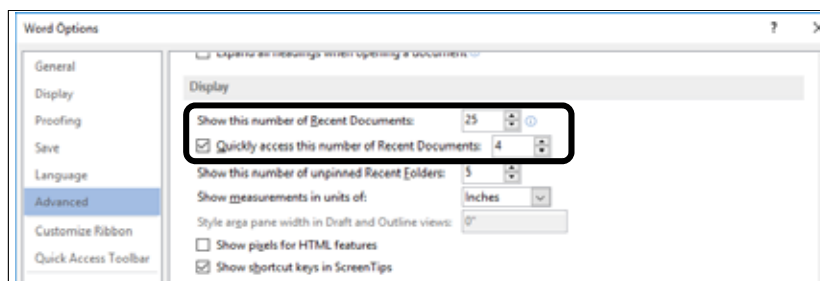
- No Windows 7 or 8 Support – Win 10 only
- Only 7 years of support versus 10; support expires same time as Office 2016
- Will include features already present in Office 365; nothing that 365 does not have will be included. 365 is the parent now.
- Targeted towards those that are still non-365 subscribers, to get them the same features.
- May be last single sold version; future may be subscription only



Accessing recently used documents faster

Choose File, Options, Advanced

- Under Display set the number of recent documents you want to see
 - Can be 0 to 50
 - This list is the one you see when choosing File Open, as well as in the list when you first open the Office App
- The check box and setting for “Quickly Access this Number of Documents” places them at the bottom of the list when in the File Menu so you don’t have to choose Open first.

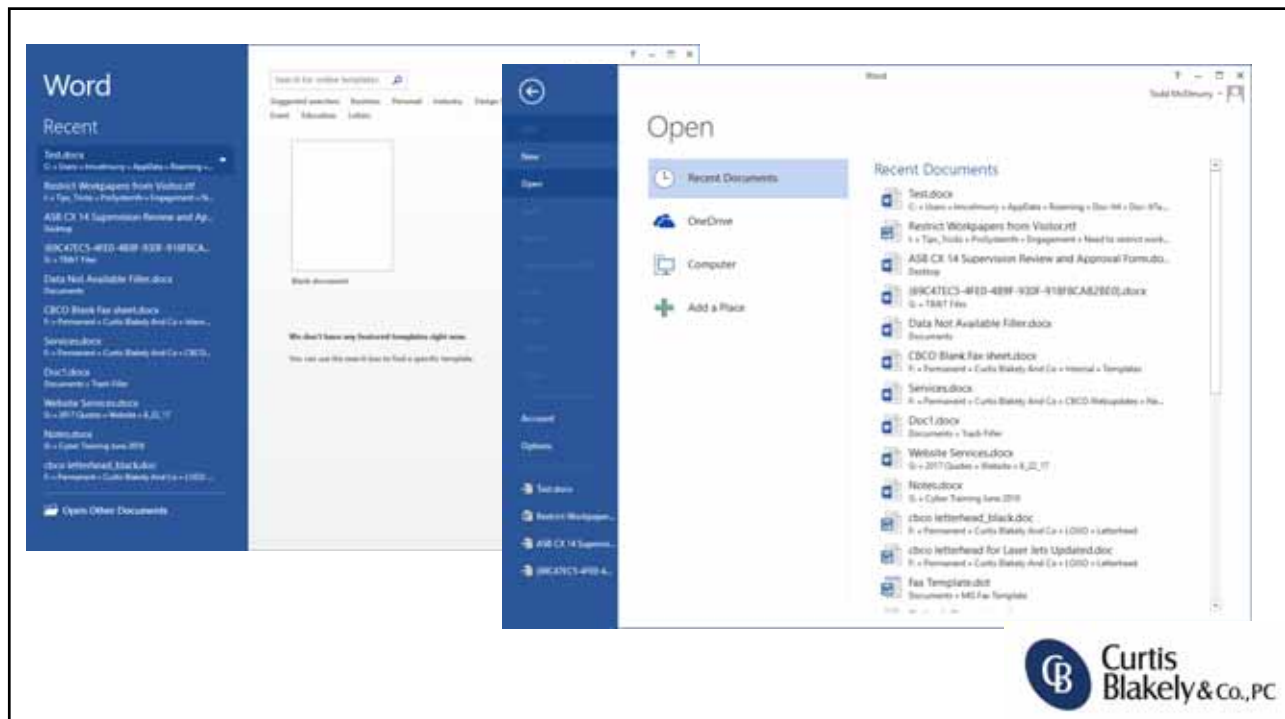


Accessing recently used documents faster

One possible issue you may run into is that you find you have to Open a New Document to get to the full file list. To get to that list without having to open a new document you can do the following:

- **Click on Open Other Documents at bottom**
- **Click on Open and you will see the full list of your most recent in the right window pane**

Examples are from Word, however it works the same in other Office Apps.



Accessing recently used documents faster

If you have a document(s) you access more regularly you can Pin it to the Open list and it will always be there for you to access. To Pin the document you will click on the Push Pin next to the document. You can perform this here:

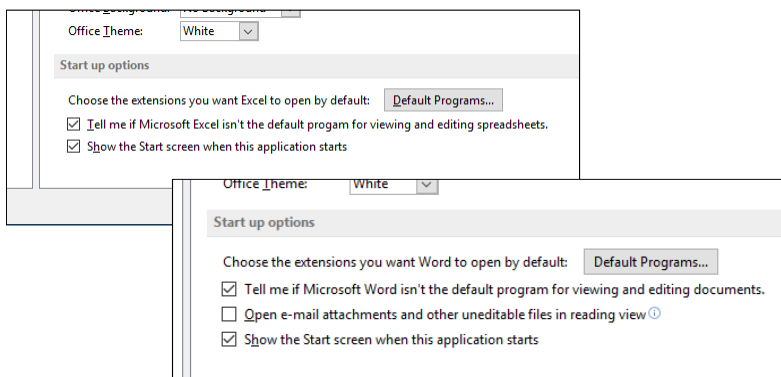
- **Pin from the File, Open menu**
- **Pin from the Document List when you first open the Office App**



Get to Blank Document faster

A complaint I hear from time to time is getting to a document faster; not having to select New Document from the Start Up screen.

- **File, Options, General – Uncheck “Show the Start Screen when this application starts”**



Modifying the Document

Quick Select

- Rapid Double-click selects a word
- Rapid Triple Click selects paragraph
- Ctrl + Click selects Sentence

Adding Lines for borders quickly

Use 3 of the following characters followed by Enter (*, =, -, _ , #, and ~)

Deleting Preceding word without having to use Backspace on each character

Ctrl + Backspace

Special Characters quickly without having to look them up

(c), (r), (tm) This will create the special characters for Copyright, Registered Trade Mark, and Trade Mark



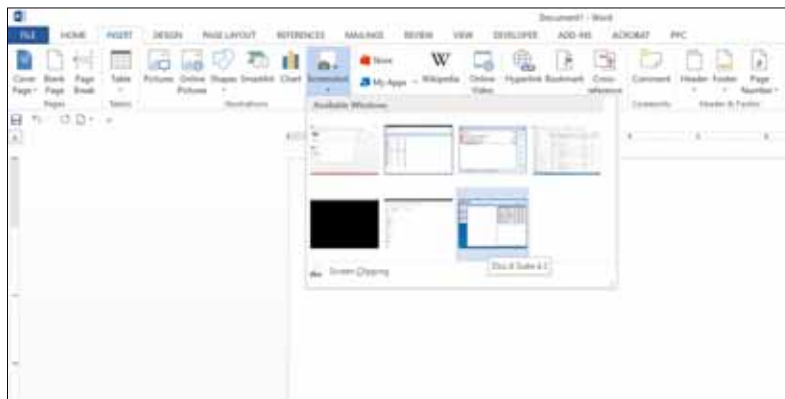
Modifying the Document

Change case of Text quickly when editing

- Shift + F3

Insert Screen Shot of something on screen while editing word

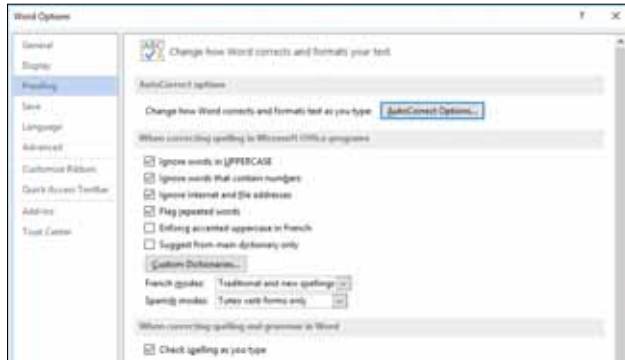
Insert, Screenshot



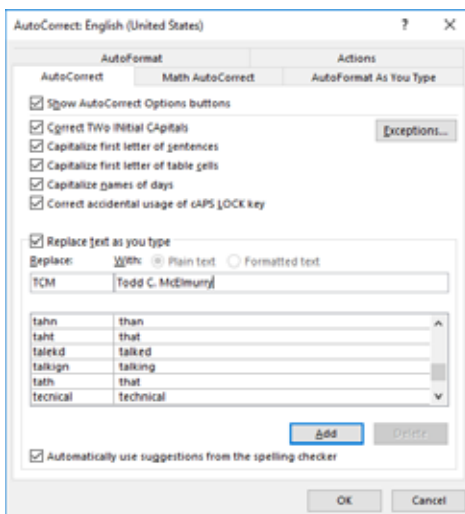
Modifying the Document

Helping with repetition and improving efficiency while ensuring correctness

- Editing AutoCorrect Options
 - This can be useful to help with repetitive entries, and to ensure that all entries match
- File, Options, Proofing, AutoCorrect Options



Modifying the Document



Add Items you want to AutoCorrect

- If you have words you have to enter on a regular basis, set them to AutoCorrect with a letter, or group of letters, or a number
- Now when you enter the item it will replace it with the proper Word, Phrase, etc.



Modifying the Document

Adding Phrases to QuickParts to simplify adding phrases and Paragraphs

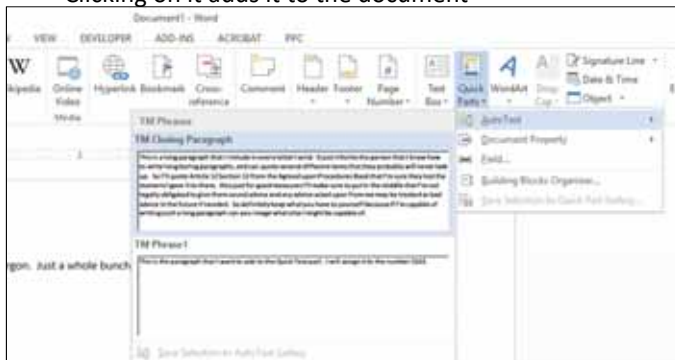
- After adding Text to a document you can select that text and then choose, Insert, QuickParts, AutoText and select "Save Selection to AutoText" adding that text for use in the future.
- This will reduce the time it takes to retype the text
 - Ensure consistency with the text between documents (no human error this way)



Modifying the Document

Using QuickParts and Assigning to Shortcut Key

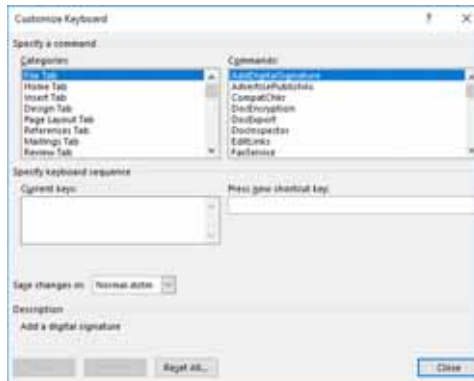
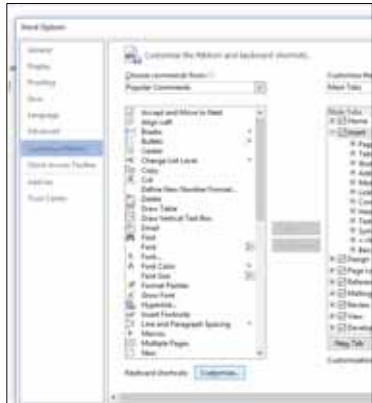
- Now that the Phrase or Paragraph has been saved under the AutoText you can access it by doing the following:
 - Choose Insert, QuickParts, AutoText and you will see the AutoText items you have added
 - Clicking on it adds it to the document



Modifying the Document

Using QuickParts and Assigning to Shortcut Key

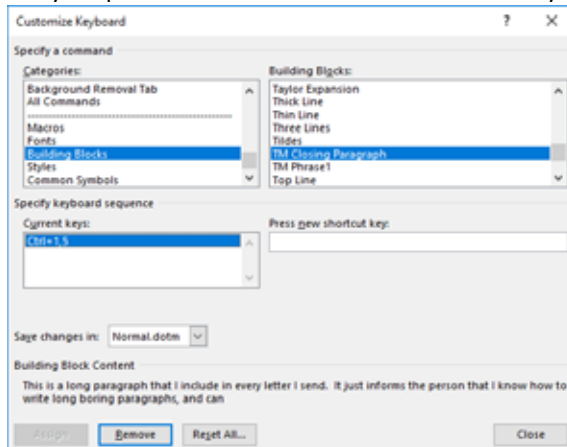
- To assign the AutoText to a Shortcut Key do the following:
 - Choose File, Options, Customize Toolbar
 - Click on Customize in the bottom right pane



Modifying the Document

Assigning to Shortcut Key

- Find your phrase in the list and enter a Shortcut Key (i.e Ctrl+15), then Assign



Now pressing Ctrl+15 in the document will produce the Paragraph



Protecting the Document

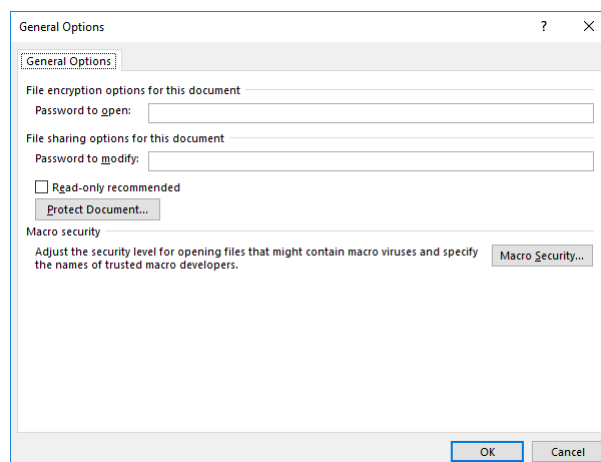
Password Protect File

- Save As, Choose Drop down at bottom next to Tools, Choose General Options



Protecting the Document

- Enter Password and settings for the document





Goal Seek

Goal Seek in Excel

- Often we find that we need to get a good estimate of where we need to be and Goal Seek helps to reduce the time coming up with the missing numbers. In this example here's our scenario:
 - We have 4 Items we are selling
 - We have a bottom dollar sale we need to reach
 - We need to know how many of item 4 we need to sale to reach that number

1	Item	Qty	Each	Total		
2	Item1	398.00	\$5.99	\$2,384.02		
3	Item2	200.00	\$3.99	\$798.00		
4	Item3	356.00	\$4.99	\$1,776.44		
5	Item4	0.00	\$16.99	\$0.00		
6				\$4,958.46	<-\$7,000	
7						



Goal Seek

Goal Seek in Excel

- Select the Cell you want to Total to X Amount
- Choose Data, What If Analysis, Goal Seek
- Enter the Amount you want to have the selected Cell Equal
- Choose the Cell you want to modify to make the Amount increase





Goal Seek

Goal Seek in Excel

- Select the Cell you want to Total to X Amount
- Choose Data, What If Analysis, Goal Seek
- Enter the Amount you want to have the selected Cell Equal
- Choose the Cell you want to modify to make the Amount increase, Press OK – Results

1	Item	Qty	Each	Total
2	Item1	398.00	\$5.99	\$2,384.02
3	Item2	200.00	\$3.99	\$798.00
4	Item3	356.00	\$4.99	\$1,776.44
5	Item4	0.00	\$16.99	\$0.00
6				\$4,958.46 <-\$7,000

Goal Seek ? X

Set cell: D6

To value: 7000

By changing cell: B5

OK Cancel

1	Item	Qty	Each	Total
2	Item1	398.00	\$5.99	\$2,384.02
3	Item2	200.00	\$3.99	\$798.00
4	Item3	356.00	\$4.99	\$1,776.44
5	Item4	120.16	\$16.99	\$2,041.54
6				\$7,000.00 <-\$7,000

Goal Seek Status ? X

Goal Seeking with Cell D6
Found a solution.

Target value: 7000

Current value: \$7,000.00

OK Cancel



Scenario Manager

Scenario Manager in Excel

- Scenario Manager is another What-If tool that allows you to substitute input values for multiple cells (up to 32) so you can see results of different scenarios at the same time.
 - In this example we are looking at Mortgage Terms using a simple mortgage calculator

	A	B	C	D	E
1	Rate	Term	Principal	Payment	Total Cost
2	6%	180	\$ 200,000	(\$1,687.71)	(\$303,788.46)
3					
4					
5					

D2 = PMT(A2/12,B2,D2) PMT=Payment for loan with constant payments and Interest rate

E2 = D2*B2





Scenario Manager

Scenario Manager in Excel

- Select Rate and Term A2:B2 (These are the input cells)
- Choose Data, What-If Analysis, Scenario Manager
- Choose Add and give the scenario a name ("BestCase") then click OK (Diagram XL5)

Diagram XL5: Scenario Manager Data Example



Scenario Manager

Scenario Manager in Excel

- Enter the best rate you could possibly get, .01 and 120. If you want to see more sets of values click Add to add more input values.

- Create other Scenarios then press OK. Worst: .06; 360; Close to Worst: .045; 360; Better: .03; 240; Could Make It: .03; 120

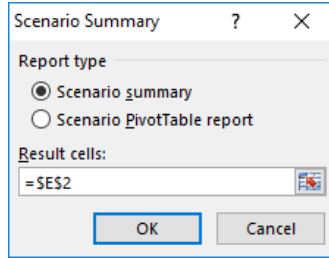
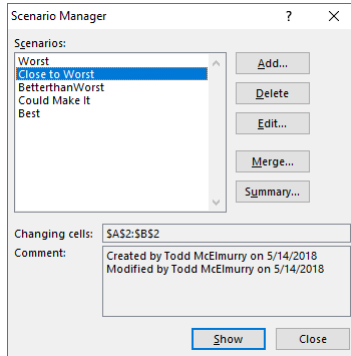




Scenario Manager

Scenario Manager in Excel

- After all Scenarios are Entered press Summary
- Select the Value you want the Scenario to run off of (D2 or E2)
- You can always go back to the data and run a new Scenario Manager



Scenario Manager

Scenario Summary						
	Current Values:	Worst	Still Bad	Better	Closer	Best
Changing Cells:						
Rate	6%	6%	5%	3%	3%	6%
Term	180	360	360	240	120	180
Result Cells:						
Cost	(\$303,788.46)	(\$431,676.38)	(\$364,813.42)	(\$266,206.85)	(\$231,745.79)	(\$303,788.46)

Notes: Current Values column represents values of changing cells at time Scenario Summary Report was created. Changing cells for each scenario are highlighted in gray.

- Data is Static in new tab for Scenario Manager so I renamed the Cell references to the names to produce a cleaner looking report.





Data Table

Data Table in Excel

- Data Tables are another What-If scenario where you can create a table that will show how data changes based on variables.
 - For this example we are using another Mortgage table with variables that can change

Mortgage Calculator					
Input	15YR		Results	15YR Results	
Loan Amt	\$150,000.00		Financed	\$145,000.00	
Deposit	\$5,000.00		Monthly Pymnt	\$572.93	\$966.84
Term (Yrs)	30	15	Total Repaid	\$ 206,253.11	\$ 174,031.98
Rate	2.50%	2.50%	Total Interest	\$ 61,253.11	\$ 29,031.98

- We will create the beginning of a table below the data that will show how other Interest Rates will affect the data.



Data Table

Data Table in Excel

- We start by adding in one Column the variables that will change. In this Example it is the Interest Rate.

Rate	Monthly Pymnt	Total Pymnts	Total Interest	Rate	Monthly	Total	Total Interest
2.50%	\$572.93	\$206,253.11	\$61,253.11	2.50%	\$572.93	\$206,253.11	\$61,253.11
3.00%				3.00%			
3.50%				3.50%			
4.00%				4.00%			
4.50%				4.50%			
5.00%				5.00%			
5.50%				5.50%			
6.00%				6.00%			
6.50%				6.50%			
7.00%				7.00%			
7.50%				7.50%			
8.00%				8.00%			

- Set a formula for the Tables so that it pulls the changing values if they update
 - Formulas for Cells would be B12 =E5, C12 =E6, D12 =E7; G12 =F5, H12 =F6, I12 = F7
- Now we choose the area we want to perform the Data Table "What-If Analysis" on and then choose Data, What-If Analysis, Data Tables
- Choose Rate for our Column Selection, leave Row Selection blank

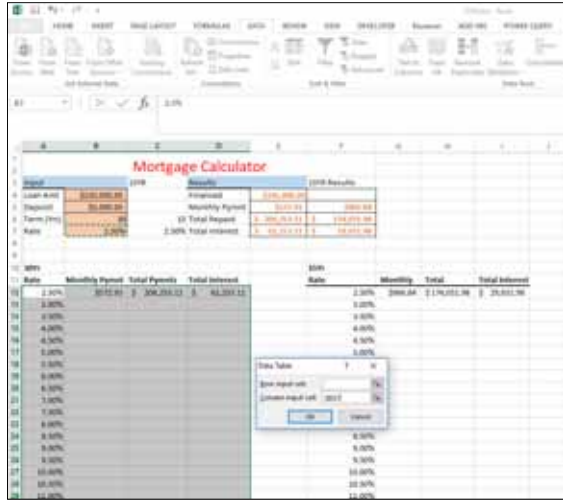




Data Table

Data Table in Excel

- We start with the 30 Year Selection



- After setting the Columns Input Press OK
- Now you will see it auto fill in the data

30Yr			
Rate	Monthly Pymnt	Total Pymnts	Total Interest
2.50%	\$572.93	\$ 206,253.11	\$ 61,253.11
3.00%	\$ 611.33	\$ 220,077.31	\$ 75,077.31
3.50%	\$ 651.11	\$ 234,401.33	\$ 89,401.33
4.00%	\$ 692.25	\$ 249,210.78	\$ 104,210.78
4.50%	\$ 734.69	\$ 264,489.73	\$ 119,489.73
5.00%	\$ 778.39	\$ 280,220.89	\$ 135,220.89
5.50%	\$ 823.29	\$ 296,385.86	\$ 151,385.86
6.00%	\$ 869.35	\$ 312,965.37	\$ 167,965.37
6.50%	\$ 916.50	\$ 329,939.51	\$ 184,939.51

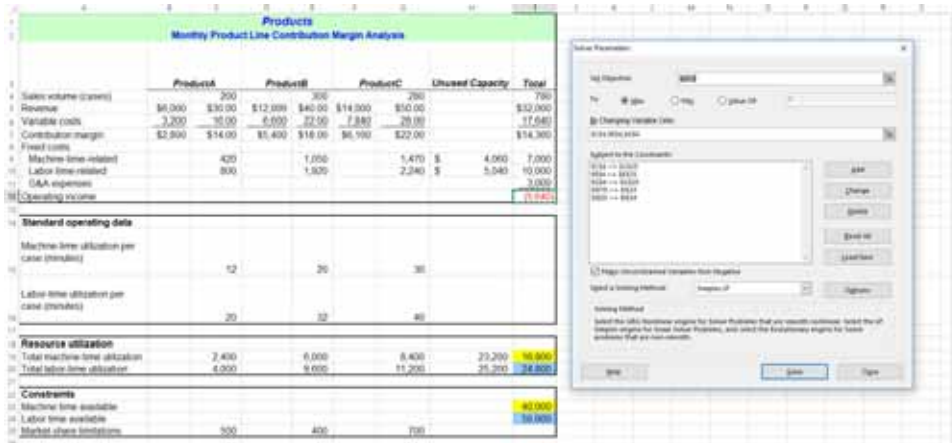
- Now you can do the same for the 15 Year side



Solver

Solver in Excel

- Solver is similar to the Goal Seek but allows you to change multiple data points to meet a criteria based on constraints. This could be used to help determine where to focus on sales, etc.





Solver

Solver in Excel

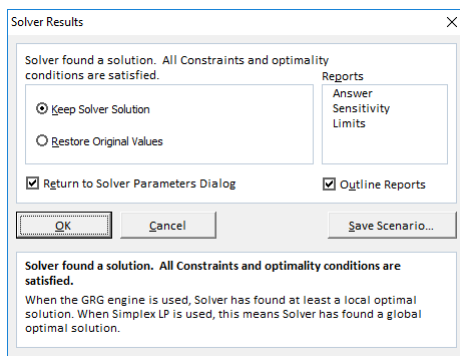
- In this example we want to increase the Operating Income, but we need to consider the Maximum Machine and Labor time available, as well as the Market Share Limitations for our Products.



Solver

Solver in Excel

- When we run the Solve it tells us if all criteria were met. If they were not we can get a report to see what is stopping Solver from running correctly.



Products
Monthly Product Line Contribution Margin Analysis

	ProductA	ProductB	ProductC	Unused Capacity	Total			
Sales volume (cases)	500	400	680		1,580			
Revenue	\$15,000	\$30,000	\$16,000	\$40,000	\$34,000	\$50,000	\$65,000	
Variable costs	8,000	16,000	8,800	22,000	19,040	28,000	35,840	
Contribution margin	\$7,000	\$14,000	\$7,200	\$18,000	\$14,960	\$22,000	\$29,160	
Fixed costs:								
Machine-time-related	1,050		1,400		3,570	\$	980	7,000
Labor-time-related	2,000		2,560		5,440	\$	-	10,000
G&A expenses								3,000
Operating income								9,160

Standard operating data	
Machine-time utilization per case (minutes)	12, 20, 30
Labor-time utilization per case (minutes)	20, 32, 40

Resource utilization	
Total machine-time utilization	6,000, 8,000, 20,400, 5,600, 34,400
Total labor-time utilization	10,000, 12,800, 27,200, -, 50,000

Constraints	
Machine time available	40,000
Labor time available	50,000
Market-share limitations	500, 400, 700

We find that our criteria for maximum Labor Time is met so Solver stops running at that time.

Our Sales Volumes change affected by the constraints

Share Workbook Locally

Sharing Data

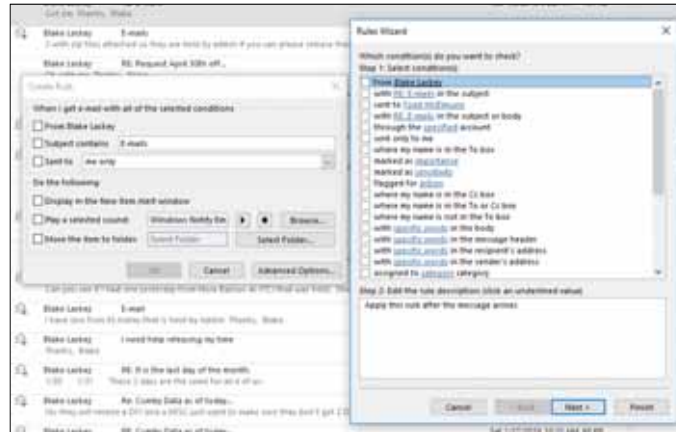
- You can share an Excel file with multiple people locally by doing the following:
 - Make sure all tables are set to Ranges (cannot share with Tables)
 - Choose Review, Share Workbook
 - Select to allow changes by more than one user at a time
 - Set Advanced Settings on how it will be saved, how conflicts work, etc.



Rules

Rules in Outlook

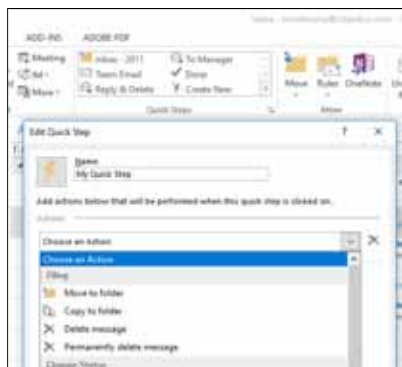
- Rules are a great way to handle messages before they arrive. With Rules you can set up where messages go, how they are treated (marked as read, deleted, etc.) as well as create a reply based on a certain criteria. Advanced Options are given to give you more flexibility.



Quick Steps

Quick Steps in Outlook

- One of the ways you can make your Outlook experience more efficient is by taking those tasks you do daily and assigning them to Quick Steps
 - Filing, Changing Status, Meetings, etc.
 - You can create a quick step that will do it for you.
 - Unlike a rule you have to select the Quick Step while the email(s) selected





Quick Steps

Edit Quick Step

Name: Forward and Perm Delete

Add actions below that will be performed when this quick step is clicked on.

Actions

Forward message as an attachment

To: tmcclurry@gmail.com

Subject: FW: <subject>

Flag: No Flag

Importance: No Change

Text: This needs to be reviewed privately

Automatically send after 1 minute delay.

Optional

Shortcut key: Choose a shortcut

Tooltip text: This text will show up when the mouse hovers over the quick step.

Finish Cancel

Edit Quick Step

Name: Forward and Perm Delete

Add actions below that will be performed when this quick step is clicked on.

Actions

To: tmcclurry@gmail.com

Subject: FW: <subject>

Flag: No Flag

Importance: No Change

Text: This needs to be reviewed privately

Automatically send after 1 minute delay.

Permanently delete message

Optional

Shortcut key: Choose a shortcut

Tooltip text: Forward and Perm Delete

Finish Cancel

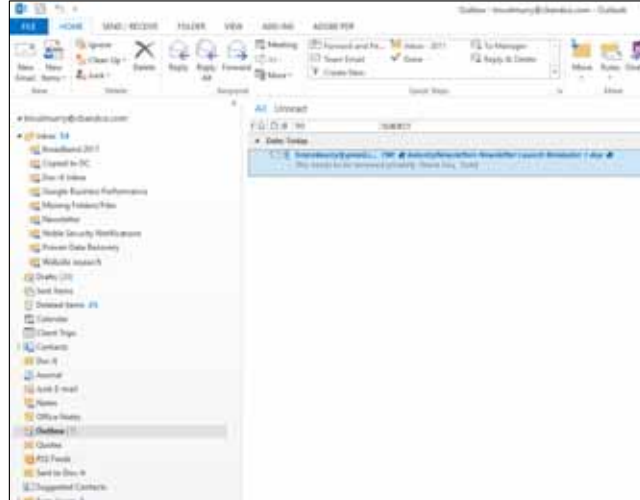


Quick Steps

This setting brings up the email for you to view and click send with.



Quick Steps



Choosing "Automatically send...." composes it, sends it and holds in Outbox for 1 minute. No intervention required.



Reply Options

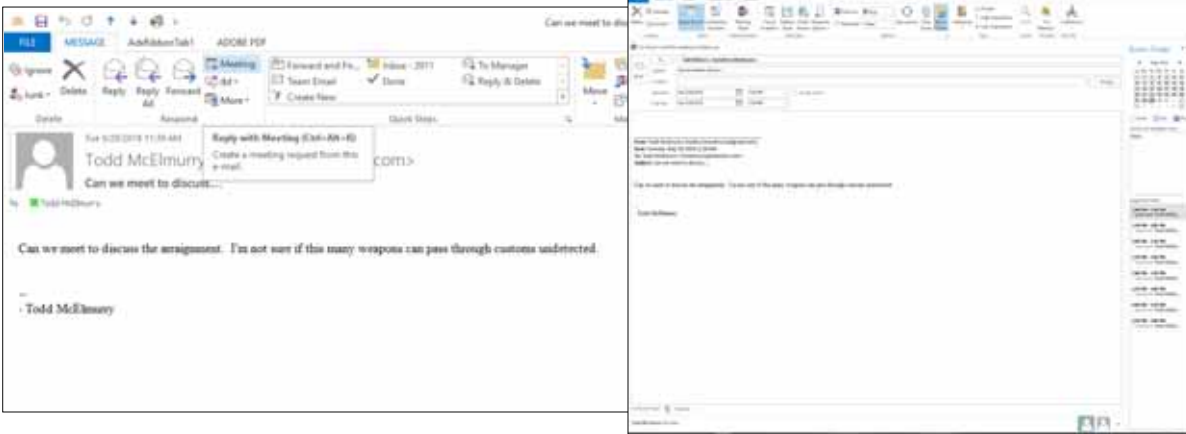
Reply Options for Outlook

- Appointment
- IM
 - Skype, Lync and other IM software compatible with Outlook
- More
 - Forward as Attachment
 - Call
 - Will place a call when running compatible software to interface with phone

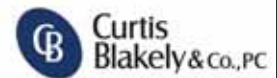




Reply Options

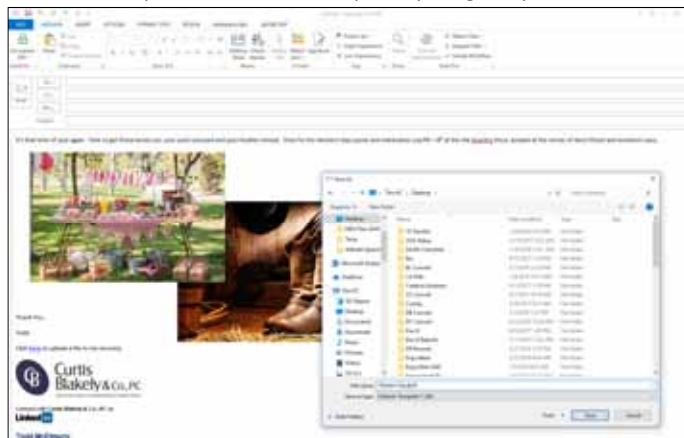


Reply with Meeting Example



Message Template

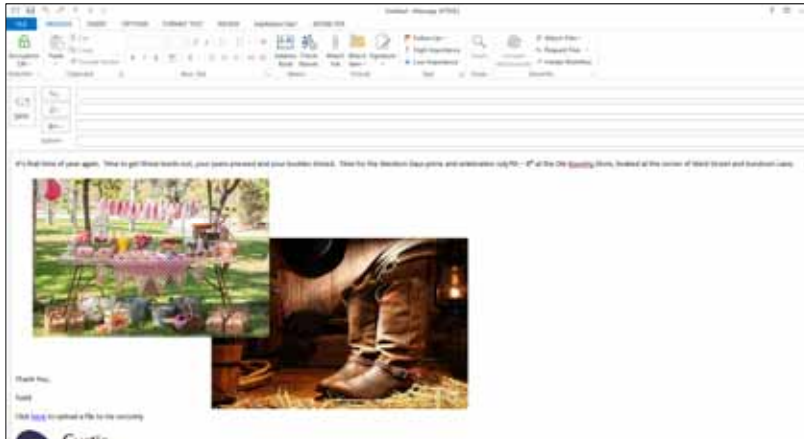
- Need a template that you use multiple times to send to a group; needs to be consistently the same.
 - You can create the template in Outlook, setup everything like you need it and Save As to an .oft file.





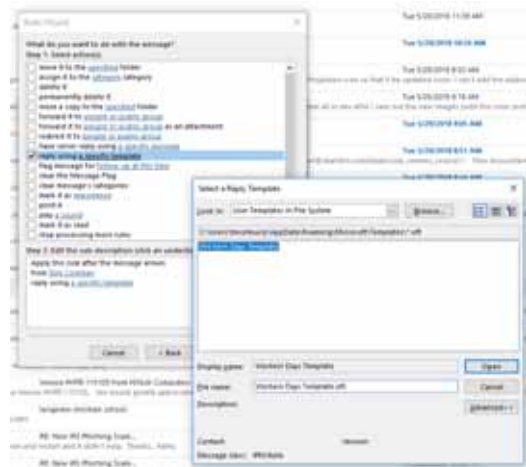
Message Template

- Now the template is saved on the Desktop (or where ever you saved it) and you just have to double-click it to load the Outlook message each time you need it.



Message Template

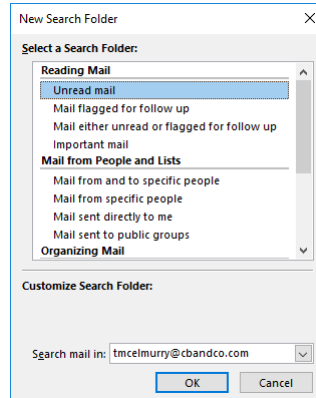
- You can also save a template as a system template for use in Rules as well.
 - File Save As
 - Leave it as default path
"C:\Users\\AppData\Roaming\Microsoft\Templates"
 - Now it can be used in Rules
 - Choose *User Templates in File System*





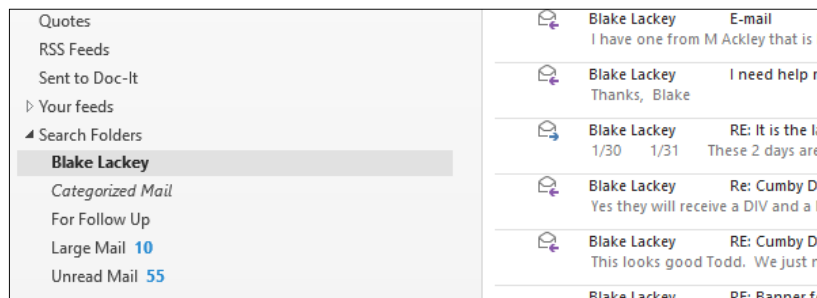
Search Folder

- Outlook comes with a Search Folder in the Mail and Folder View list. This can be used to create a search criteria for you to use multiple times.
 - Create a new Search Folder by right-clicking Search Folder, and choose “New Search Folder”
 - Add your criteria



Search Folder

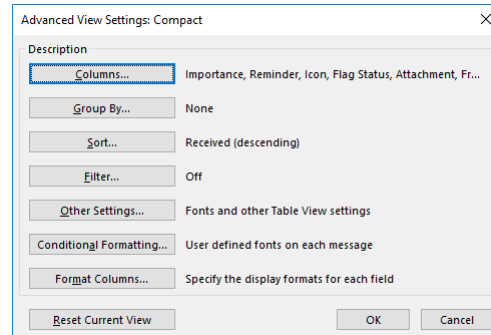
- Now you can use the Search Folder anytime you want to find specific items without having to enter the search criteria at the top of the email view list





Tweaking Layout

- You can use different settings to Organize your messages.
 - Use Categories
 - Follow Up Flags
 - Tweak the Columns to add/remove items
 - Use Advanced Settings (Right-Click Column headers, View Settings)
 - Adjust Columns
 - Group By
 - Sort
 - Filter
 - Other Settings (adjust fonts and views)
 - Conditional Formatting
 - Format Columns

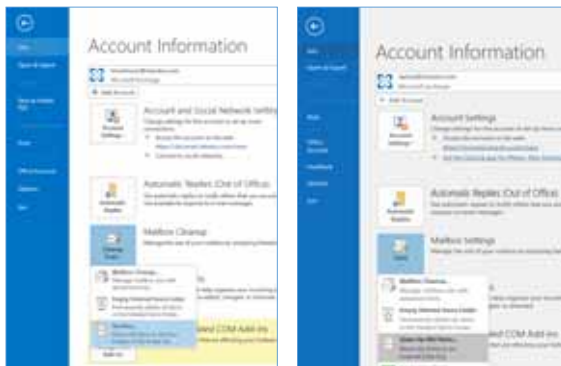


Note: Views can become corrupt and cause load issues, thus Reset Current View or using t/cleanviews for loading outlook can help.



Copy Archive Folder layout

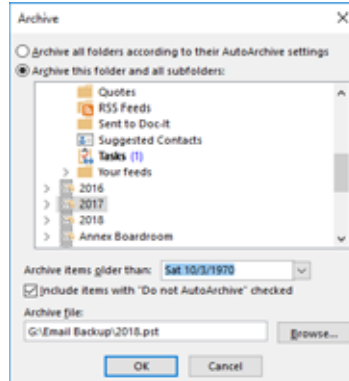
- Often you want to keep the layout of an Archive folder and copy it to create a new one. Here are the steps to do so:
 - File, Info, Cleanup Tools, Archive (2013)
 - File, Info, Tools, Cleanup Old Items





Copy Archive Folder layout

- Select the item you want to copy the folder structure from
- Browse to where you want to place the new PST
- Set the *Archive items older than*: to a date older than anything you have in the folders
 - This ensures that the structure only is created and not any emails
- Press OK
- Now the Archive is made and ready for you to open in Outlook



Thank You!

Todd McElmurry
Network Administrator



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(903) 758.0734

Cbandco.com

MS Office 365 Enterprise Comparison

\$12 user/month (annual commitment)	\$8 user/month (annual commitment)	\$20 user/month (annual commitment)	\$35 user/month (annual commitment)
Office 365 Plus	Office 365 Enterprise E1	Office 365 Enterprise E3	Office 365 Enterprise E5
Office applications plus cloud storage and sharing. Business email not included.	Business Services - email, file storage and sharing, Office Online, meetings and IM, and more. Office applications not included		
Office Applications Outlook, Word, Excel, Powerpoint, One Note, Access (PC Only)	Office Applications (not included)	Office Applications Outlook, Word, Excel, Powerpoint, One Note, Access (PC Only)	Office Applications Outlook, Word, Excel, Powerpoint, One Note, Access (PC Only)
Services One Drive	Services Exchange, One Drive, SharePoint, Skype for Business, Microsoft Teams, Yammer	Services Exchange, One Drive, SharePoint, Skype for Business, Microsoft Teams, Yammer	Services Exchange, One Drive, SharePoint, Skype for Business, Microsoft Teams, Yammer, Power BI Pro

Plan Comparison

	Office 365 Plus	Office 365 Enterprise E1	Office 365 Enterprise E3	Office 365 Enterprise E5
Desktop Version of Office	✓		✓	✓
Web Version of Outlook, Word, Excel and PowerPoint	Outlook Not included ✓	✓	✓	✓
One License covers 5 phones, 5 tablets, and 5 PCs	✓		✓	✓
File Storage and Sharing with One Drive Storage	✓	✓	✓	✓
Maximum number of users	unlimited	unlimited	unlimited	unlimited
FastTrack deployment support with purchase of 50+ seats at no extra cost	✓	✓	✓	✓
24/7 phone and web support	✓	✓	✓	✓
Email hosting and custom email domain address		✓	✓	✓
Manage tasks and teamwork with MS Planner		✓	✓	✓
Inform and Engage with Sharepoint		✓	✓	✓
Host unlimited HD vide conferencing meetings with up to 250 people with Skype for Business ®		✓	✓	✓
Host meetings for up to 10,000 people with Skype Meeting Broadcast		✓	✓	✓
Get a hub for teamwork with MS Teams		✓	✓	✓
Collaborate across departmenets and locations with Yammer		✓	✓	✓
Search and discovery with Delve		✓		
eDiscovery with in-place search, hold and export			✓	
Advanced eDiscovery with in-place search, hold, export and analytics				✓
Manage Schedules and daily staff work tasks with MS StaffHub		✓	✓	✓
Manual retention and deletion policies and manual classifications		✓	✓	✓
Guard your mailbox against malicious links and attachments with Exchange Online Advanced Threat Protection				✓
Control how support accesses your mailbox with Customer Lockbox				✓
Auto classification, smart import, and more with Advanced Data Governance				✓
Assess risk and gain insight into potential threats with Office 365 Coloud App Security				✓

Plan Comparison, continued

	Office 365 Plus	Office 365 Enterprise E1	Office 365 Enterprise E3	Office 365 Enterprise E5
Advanced personal and organizational analytics with MyAnalytics and Power BI Pro				✓
Make, receive, and transfer calls across wide range of devices with Phone System				✓
Make domestic or international calls from current or new phone numbers with add-on Calling Plan®				✓
Create meetings with a dial-in number that attendees can join by telephone with Audio Conferencing				✓