K2's Best Word, Outlook, And PowerPoint Features

Continuing Professional Education Series



K2 Enterprises
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CONTRIBUTORS: The shareholders, associates and staff of K2 Enterprises contributed in the production of these materials.

Photograph of K2 Mountain by Adrian Burgess

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Introduction

Three Rules of this Seminar

1. **There Are No Dumb Questions.** Please ask questions if you need further explanation. We welcome your questions and will do our best to provide accurate and meaningful answers.

2. **Obtain the Information for Which You Came.** If you have a specific interest in a topic, please let us know. If your topic is not already part of the course materials, we will do our best to accommodate your request. Our instructors are anxious to meet your needs, but, if you do not ask questions (rule #1), they cannot give you the information that you want.

3. **Share and Share Alike.** Our instructor is here to share all possible information related to the course. We hope that you will be willing to do the same. If you have some great tips or experiences, please share them with us and with the other participants.

Course Development

The shareholders, associates, and staff of K2 Enterprises developed this course and the related course materials. Our goal is to deliver top quality educational courses that help you better use and understand the tools and concepts that are the focus of this session.

We designed our course presentation style for busy professionals. Through numerous short case studies and feature reviews, we strive to deliver concise information in a context that is easy to understand and easy to absorb.

To maximize the use of your time and the benefits of attending this course, we have worked hard to filter out trivial and obscure features. Our goal is not to cover every keystroke and menu option but to provide a fast-paced course that focuses on state-of-the-art information technology and what it can do for you and your staff.

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About K2 Enterprises

Mission Statement

K2's goal is to produce and to deliver the highest quality technology seminars and conferences available to business professionals. We work cooperatively with professional organizations such as state CPA societies, associations of Chartered Accountants, and vendors of technology products. We make every effort to maintain a high level of integrity, family values, and friendship among all involved.

K2 Enterprises is named after the second highest mountain in the world. (The summit of K2 is 28,251 feet above mean sea level; Mount Everest is 29,026 feet above mean sea level.) The shareholders and associates of K2 Enterprises are listed in the following table.

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Over more than thirty years, our team members have collectively delivered more than 19,000 national and international technology-focused seminars, webinars, and conferences. To help us stay on top of technology, our team members read numerous technology trade magazines, attend many technology conferences, and talk with numerous technology companies each year to obtain the latest information to include in our courses. In addition, we personally experience everything we teach and recommend to our audiences. Because our shareholders and associates reside in different states, the use of technology is a necessity for the success and survival of our business.

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The K2 Seminar Curriculum

Two-day Seminar

- K2's Excel Boot Camp – Two Days of Intensive Excel Training

Full-day Seminars

- K2's Accounting Solutions Shootout for Small and Mid-Sized Businesses
- K2's Advanced Excel
- K2's Advanced Excel Data Magic – Managing, Analyzing, and Reporting – *NEW FOR 2020!*
- K2's Budgeting and Forecasting Tools and Techniques
- K2's Business Continuity – Best Practices for Managing the Risks
- K2's Business Intelligence, Featuring Microsoft's Power BI Tools
- K2's Case Studies in Fraud and Technology Controls - *NEW FOR 2020!*
- K2's Cloud Computing
- K2's Excel Best Practices
- K2's Excel Essentials for Staff Accountants *NEW FOR 2020!*
- K2's Excel Financial Reporting and Analysis
- K2's Excel PivotTables for Accountants
- K2's Excel Tips, Tricks, and Techniques for Accountants
- K2's Microsoft Office 365 – All the Things You Need to Know
- K2's Paperless Office
- K2's Planning and Managing Your Team's Technology
- K2's QuickBooks for Accountants
- K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection
- K2's Technology for CPAs – Don't Get Left Behind

Half-day Seminars

- K2's Advanced Excel Reporting – Best Practices, Tools, and Techniques
- K2's Advanced QuickBooks Tips and Techniques
- K2's Best Word, Outlook, and PowerPoint Features - *NEW FOR 2020!*
- K2's Case Studies in Fraud and Technology Controls - *NEW FOR 2020!*
- K2's Emerging Technologies, Including Blockchain and Cryptocurrencies
- K2's Ethics and Technology - *NEW FOR 2020!*
- K2's Excel Charting and Visualizations - *NEW FOR 2020!*
- K2's Implementing Internal Controls in QuickBooks Environments
- K2's Introduction to Excel Macros
- K2's Remote Access for Small Businesses - *NEW FOR 2020!*
- K2's Securing Your Data – Practical Tools for Protecting Information
- K2's Technology Update
- K2's Testing and Auditing Excel Workbooks
- K2's Top PDF Features You Should Know

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In addition to the seminars listed above, K2 Enterprises also produces approximately 25 one and two-day technology conferences each year. You can find a complete listing of our course offerings, including dates, locations, and course descriptions, on our website at www.k2e.com/events.

On-site Training

Working cooperatively with state CPA organizations, we are pleased to offer all our seminars and conference sessions as on-site training opportunities. On-site training offers companies of all sizes numerous advantages, including the following.

- ***Customization***. K2 Enterprises can customize the content of all on-site training events to meet the specific needs of your organization. For example, we can combine selected parts of existing courses into one customized course to meet your specific needs. Likewise, we can develop custom content from the ground up and deliver it to your team members, thereby ensuring that your training objectives are met.

- ***Cost savings***. For organizations of all sizes, on-site training can provide significant cost savings when compared to public training venues. In addition to potentially reduced registration fees, these cost savings materialize in the form of reduced travel costs and reducing the amount of time team members spend away from the office.

- ***Convenience***. Because you select the date, time, and location of your on-site training event, on-site training is more convenient for you and your team members than traditional training options. Many organizations schedule on-site training in conjunction with staff meetings, retreats, and customer/client events to leverage further the value of all participants' time.

Customization, ***cost savings***, and ***convenience*** – the three C's of "training to go." For more information on how you and your organization can experience these benefits or to schedule an on-site training event, please visit *http://www.k2e.com/training/on-site-training* or contact *pam@k2e.com.*

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Web-based Training

K2 Enterprises offers web-based CPE to accounting and business professionals throughout the United States. K2's team of award-winning instructors delivers two-hour, four-hour, and eight-hour webinars on numerous technology-focused topics, including Microsoft Excel, QuickBooks, PDF documents, technology trends and strategies, and security. For more information on these webinar offerings or to register, please visit *www.k2e.com/webinars*.

On Demand Courses

K2 Enterprises provides On Demand training opportunities. On Demand courses offer you the advantage of receiving top-quality training at a time and location that fits into your busy schedule. You can start a course today and complete it in the future, if that is necessary to help you achieve the work-life balance you desire. For more information or to register, please visit *http://www.k2e.com/training/on-demand*.

K2 Internet Sites

As a service to our attendees, K2 Enterprises maintains multiple Internet sites that contain information and links that are relevant to the needs of CPAs and other business professionals and that enrich your experience during and after our seminars.

The K2 websites contain details on the topics that we present, tips on using the software and hardware that we cover, and information on the products that we use daily and can recommend with confidence. Our pages contain links to the websites of some of the top accounting and content management software solutions as well as to other websites of interest and even to a few sites that are just fun places to visit. We invite you to visit our websites often. If you have any comments, questions, or suggestions regarding our web pages, please send an email to *webmaster@k2e.com*.

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www.k2e.com

This is the primary website for **K2 Enterprises**. Here you can access information regarding CPE opportunities, including seminars, conferences, on-site training, web-based training, and on demand opportunities. You can also access a library of technology tips and articles, and you can link to K2-related websites.

www.cpafirmtech.com

CPA Firm Technology contains technology-related information targeted specifically to public accounting firms. Included are product reviews, hardware and operating system discussions, affinity programs for CPA firms, and Cloud computing resources.

www.accountingsoftwareworld.com

Accounting Software World provides information related to accounting and financial management solutions. You can find software and service reviews, product comparisons, white papers, and other material of interest to those seeking information about accounting software and service solutions.

www.totallypaperless.com

For information about document management and paperless process, please visit **Totally Paperless**. This site provides reviews on hardware and software used by all types of businesses in document imaging and management processes.

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Microsoft Word's Best Features

Chapter 1

Most professionals are self-taught in Word. They know how to enter text in a document, how to add formatting characteristics text, and how to save and print the document. Some have advanced their skills to include creating tables and pasting Excel charts and spreadsheet data into their documents, but few have mastered some of Word's most fundamental tools – tools that provide more polished, professional documents in a fraction of the time. In this section, we will examine some of Word's best and most powerful features to make you more productive.

Learning Objectives

Upon completing this chapter, you should be able to:

- Identify key features for entering, editing, and formatting data, including Styles;
- Use the Navigation Pane to navigate or rearrange a document quickly and easily;
- Describe various methods for selecting text in a Word document;
- Define Quick Parts and Building Blocks and how to use them effectively;
- Integrate Excel content with Word documents;
- Use charts, SmartArt, and screenshots to communicate more effectively; and
- Describe how to create and format Tables.

Styles – Word's Most Powerful Feature

Styles, Word's most powerful feature, are defined sets of formatting characteristics that you can apply to text, paragraphs, tables, or lists. By using Styles, you avoid the cumbersome and time-consuming task of applying individual formatting attributes to a document. They help to ensure consistency of formatting within a single document and across multiple documents. Additionally, Styles also offer some lesser-known benefits, including the ability to navigate and rearrange documents, generate Tables of Contents, produce PowerPoint slideshows automatically, and create bookmarked PDFs.

In default, Word applies the **Normal** style to all text entered. Any formats applied subsequently, such as boldface, underline, or italics, take precedence over the formatting characteristics applied by the Normal style. Text or objects to which a style is applied inherit the formats associated with the style. Further, styles are merged into documents so that styles go with the document wherever it goes. If a user emails a document that includes custom styles to others,

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the formatting fidelity of that document is preserved when the recipients open the document on their computers.

Style Gallery and Style Sets

The Style gallery is a list of frequently used styles, known as **Quick Styles**, located on the **Home** tab of the Ribbon as shown in **Figure 1**. Click the drop-down arrow in the lower right corner of the gallery to display a more complete selection of the styles available.

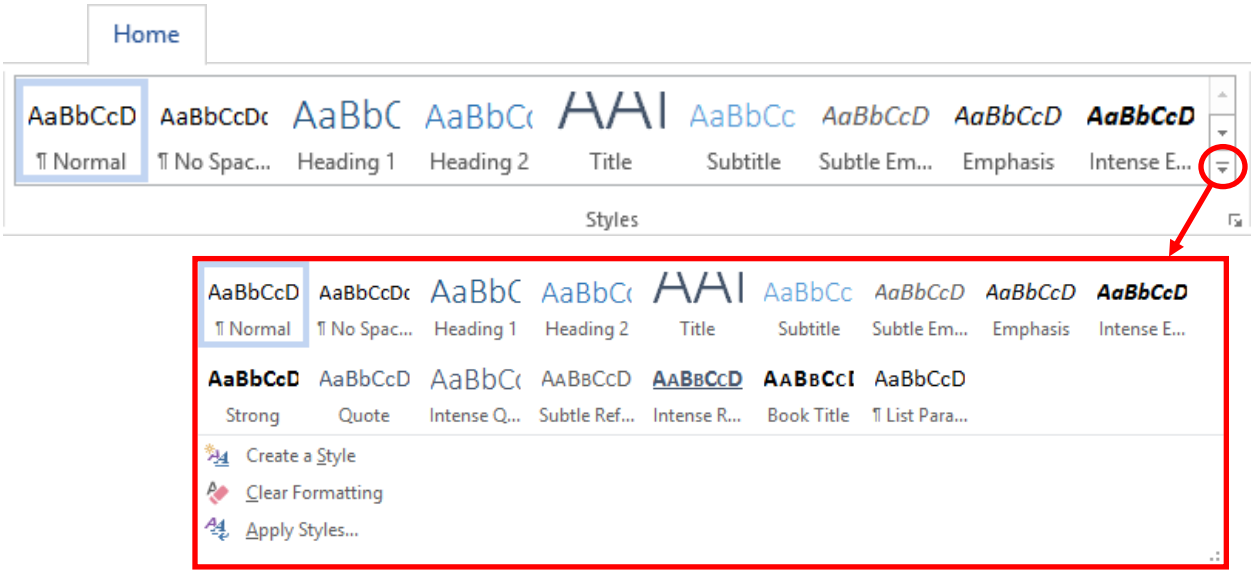


Figure 1 - Accessing Styles on the Home Tab

To see all the styles available in a document, choose **Apply Styles** and browse by clicking the drop-down arrow or click the **Styles** icon in the **Apply Styles** dialog box.

In addition to Quick Styles, Word provides access to built-in and custom **Style Sets.** Style sets are collections of Quick Styles stored as **Designs** that can be used with any document. To change the entire look and feel of a document quickly, apply a different design from the **Design** gallery on the **Design** tab of the Ribbon as shown in **Figure 2**. Note that designs interact with **Themes**.



Figure 2 – Quick Style Sets are Associated with Designs

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Modifying Styles

To modify an existing style, simply right-click on the style in the Styles gallery and select **Modify** in the context-sensitive menu to open the **Modify Style dialog box** as shown in **Figure 3**. Make any required changes and then click **OK** to save them. All text to which the modified style is applied will immediately update to reflect the changes.

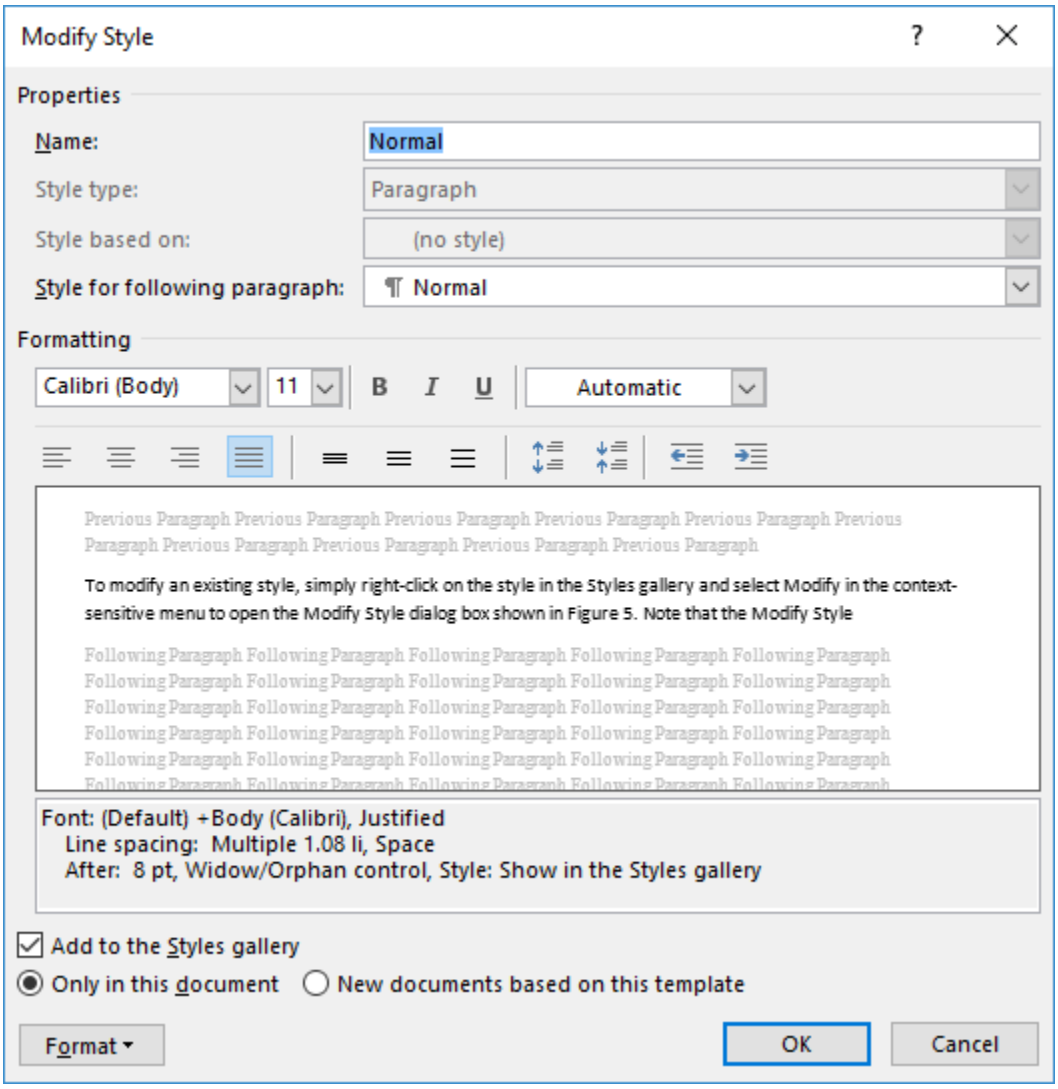


Figure 3 - Modify Styles Dialog Box

Alternatively, select some text in the document to which an existing style has been applied. Then, format the text to reflect any desired changes. Right-click on the style in the **Styles** gallery and select **Update [style name] to Match Selection**. Again, all text to which the modified style is applied will immediately update to reflect the changes.

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Creating New Style Sets

Style Sets are stored as templates and appear in the Design gallery in Word. You can create custom Style Sets for use in other documents. To create a custom Style Set, create or modify a style or collection of styles in a document. Then, click the drop-down arrow in the lower right corner of the **Design** gallery and click **Save as a New Style Set.** In the **Save as a New Style Set dialog box, e**nter a **File name** and click **Save** to save the new style set. Once saved, the style set will be available in the **Custom** section of the **Design** gallery.

Hidden Advantages of Using Styles

While styles provide convenience and productivity improvements over formatting documents in place, styles unlock other powerful functionality that is usually hidden from those unfamiliar with styles. Among the hidden functions are the ability to navigate and rearrange documents, generate Tables of Contents, create bookmarked PDFs, and produce PowerPoint slideshows automatically.

Navigate or Rearrange a Document in the Navigation Pane

Word automatically creates a **Document Map** for any document that incorporates any of the Heading styles. A Document Map allows you to see the overall organization of a document as shown in **Figure 4**.

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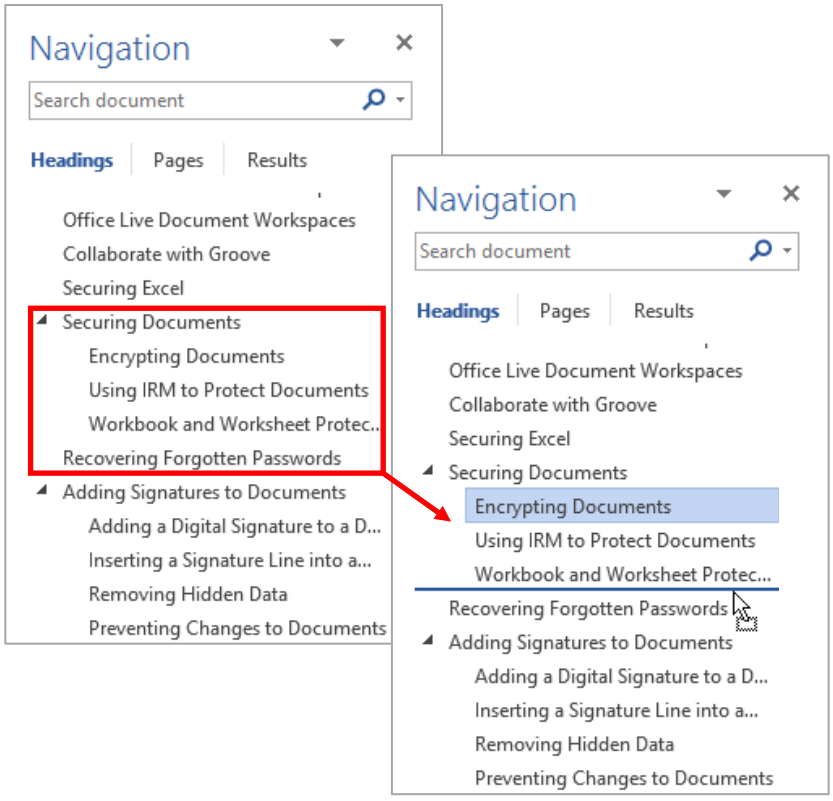


Figure 4 – Using the Document Map to Rearrange a Document

You can quickly navigate through a document or rearrange a document without using traditional cut-and-paste methods. To navigate to an identified location in a document, just click the appropriate heading in the map. To rearrange a document from the Document Map, simply click-and-drag a section of the document to its desired location. To promote or demote a section of the document, right-click on the appropriate heading in the Document Map and select **Promote** or **Demote** from the context-sensitive menu. To access a Document Map in Word, check the box entitled **Navigation Pane** on the **View** tab of the Ribbon.

Auto-Generate a Table of Contents

When styles are used to format a document, you can create a table of contents for the document automatically. What is normally a very cumbersome and time-consuming process can be reduced to just a few clicks. To create a table of contents, place the cursor in the location where the table of contents is desired and then click **Tables of Contents** on the **References** tab.

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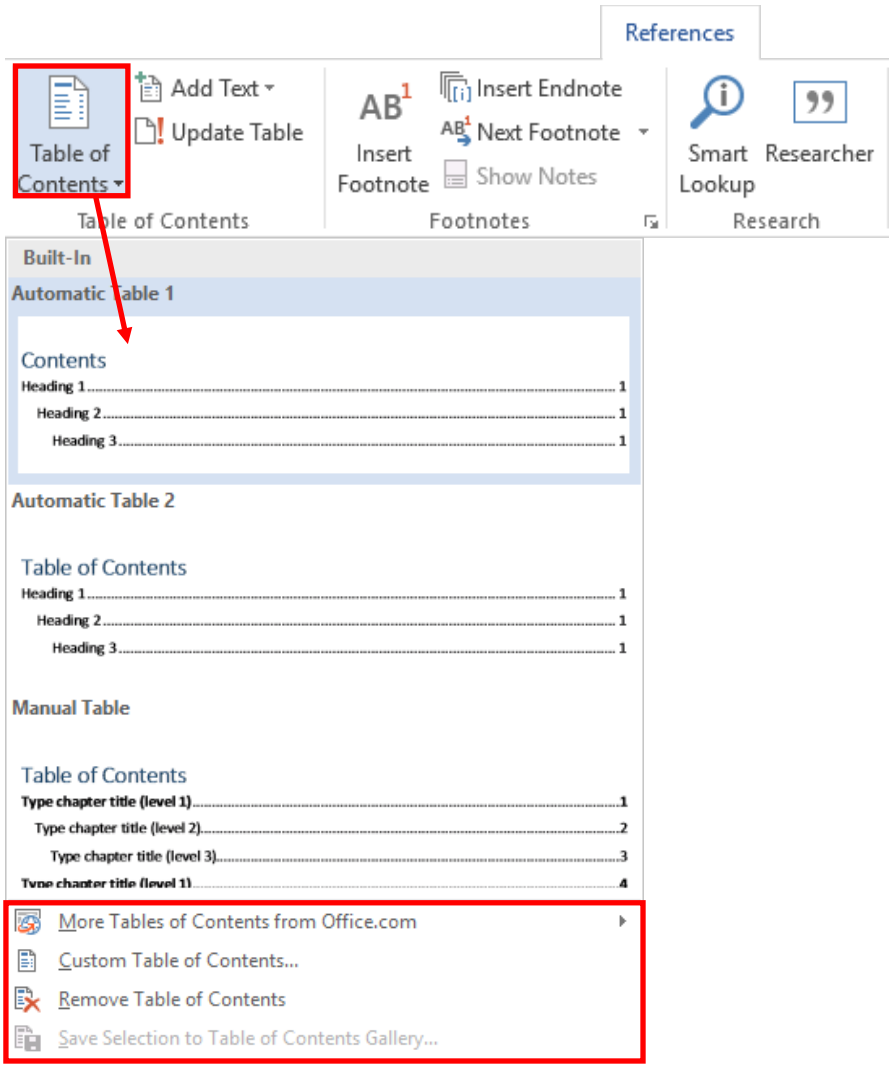


Figure 5 – Generating a Table of Contents

You may utilize one of the built-in Table of Contents styles or customize a style to meet your needs. Whenever the document is modified, simply click on the table of contents, and select **Update Table** from the floating menu that appears at the top of the table.

Create Bookmarked PDFs

When styles have been used to format a document, you can create PDFs that are bookmarked for navigation automatically. Simply choose to save the document as a PDF file. In the **Save As** dialog box, click the **Options** button and make sure to check **Create bookmarks using Headings** as shown in **Figure 6**. If a user has an Adobe Acrobat license, bookmarks can be created automatically from styles using the PDF Maker add-in on the **Acrobat** tab. Also note that bookmarks are *not* created when a document is *printed to PDF*, even if styles were used in formatting the document.

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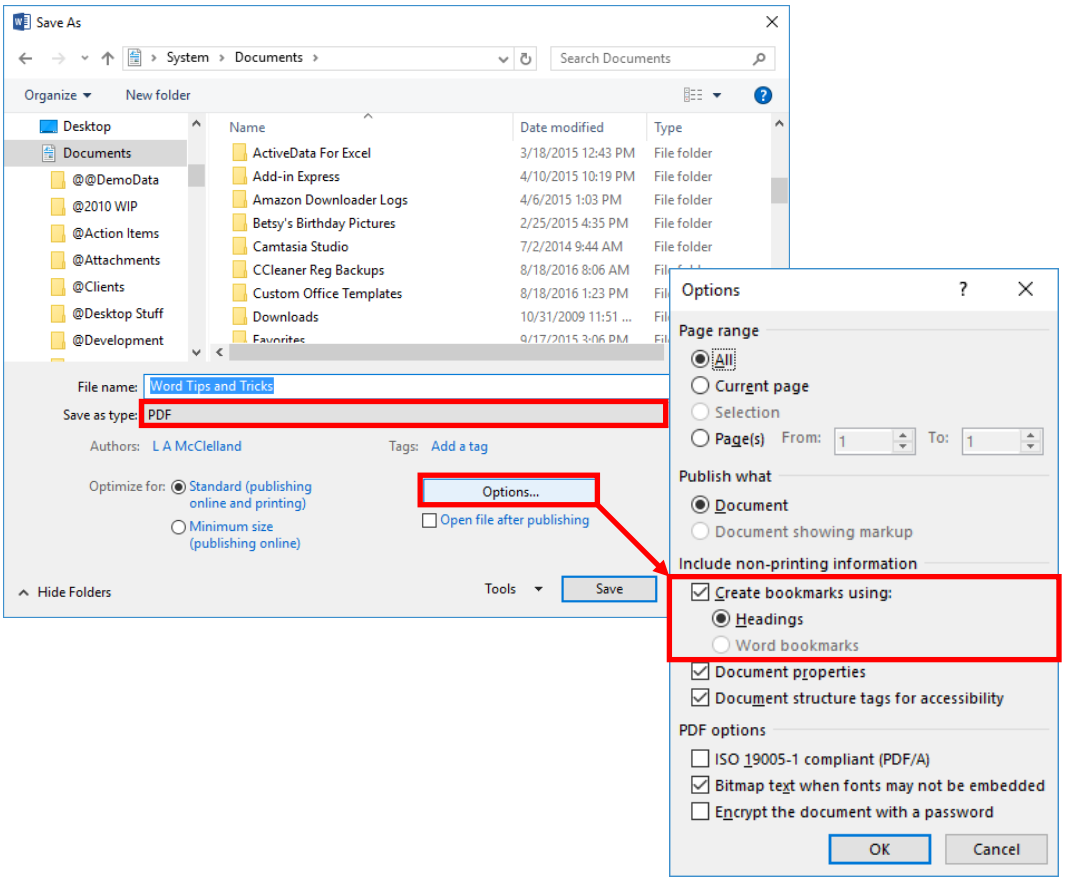


Figure 6 – Creating Bookmarks from Heading Styles

When a Word document contains a generated table of contents, as discussed earlier, the table saved to the PDF will be clickable. In other words, when a user clicks on an entry in the table of contents, the cursor will be relocated to the entry's reference within the document.

Selecting Text

For most Word users, selecting text with a mouse or other pointing device is second nature. Simply click-and-drag on the text to select it. Once the text is selected, you can apply formats, copy or cut it, delete it, or move it to another location with a click-and-drag of the mouse. However, there are more efficient and effective alternatives for selecting text as outlined in the following table.

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How to Select Text?	Text Selected
Click in Left Margin	Line
Double-click in Left Margin **Triple-click in Paragraph**	Paragraph
Triple-click in Left Margin **CTRL + A**	Entire Document
Double-click in Word	Word
CTRL + click in Sentence	Sentence
Click and Shift-click	Block of Text
ALT + drag	Vertical Block of Text

Once text is selected using any of these alternative shortcuts, you can perform all actions that could have been performed if you had selected the text with a mouse or pointing device.

Using Building Blocks and Quick Parts

Building Blocks are predefined snippets of document content saved for future use. Building Blocks can contain one or more paragraphs of text, tables, lists, or any other form of content. Word includes many predefined Building Blocks, including headers, footers, cover pages, text boxes, equations, page numbers, tables, and watermarks. Building Blocks are accessible by clicking **Quick Parts**, **Building Block Organizer on the Insert tab of the Ribbon** to open the **Building Blocks Organizer** dialog box as shown in **Figure 7**. Simply select the desired Building Block in the list and click **Insert** to add the associated text to the document.

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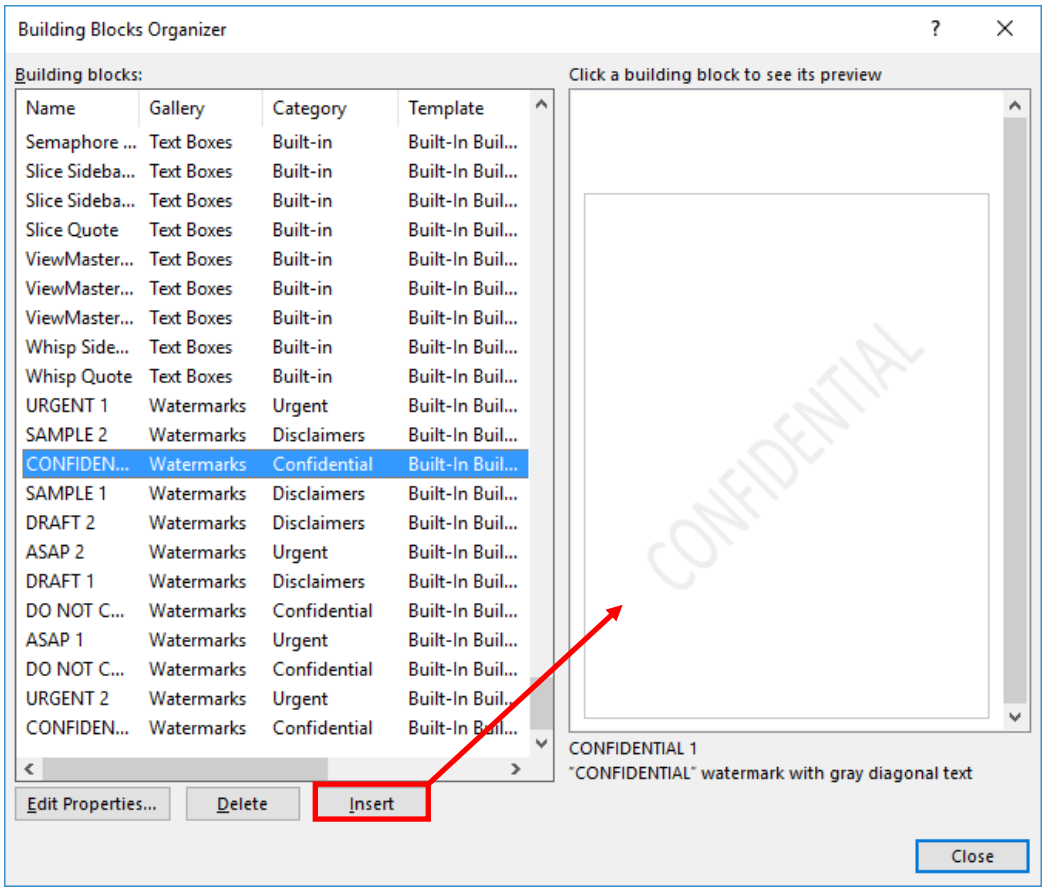


Figure 7 - Word's Building Block Organizer

You can also create your own customized Building Blocks for future use. To create a Building Block, first select the desired contents in a document. Then, click **Quick Parts** on the **Insert** tab and choose **Save Selection to Quick Part Gallery** as shown in **Figure 8**. In the **Create New Building Block** dialog box, complete the entries for the information requested.

While **Name** and **Description** are self-explanatory, the other information boxes in the dialog box warrant explanation.

- **Gallery** – Building Block galleries are subdivisions of the full set of Building Blocks. Galleries are used to group similar Building Blocks together to aid in the process of locating and inserting a Building Block into a document. Galleries present by default include Cover Pages, Page Numbers, Headers, Footers, Quick Tables, and Watermarks. In default, all new Building Blocks are assigned to the Quick Parts gallery, though you have the option of creating your own galleries or saving a Building Block in a gallery other than the Quick Parts gallery.

- **Category** – When saving a Building Block, Word prompts you to save it in a Category in addition to a Gallery. Categories are additional means of grouping Building Blocks

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together for ease of recall. Word provides only one Category in default – General – but you can create your own categories as required.

- **Save in** – Word saves Building Blocks in template files. More specifically, Word saves Building Blocks in the **Building Blocks.dotx** template. You may choose to save new Building Blocks in the **Normal.dotm** template or any other global template so that the Building Blocks are accessible when working in any document. On the other hand, you may save the Building Block to a specific document template. Then, it will only be accessible in a document that uses that specific template.

- **Options** – This setting allows you to control how Word will insert the Building Block. The three choices available here are 1) **Insert content only**, 2) **Insert content in its own paragraph**, and 3) **Insert content in its own page**.

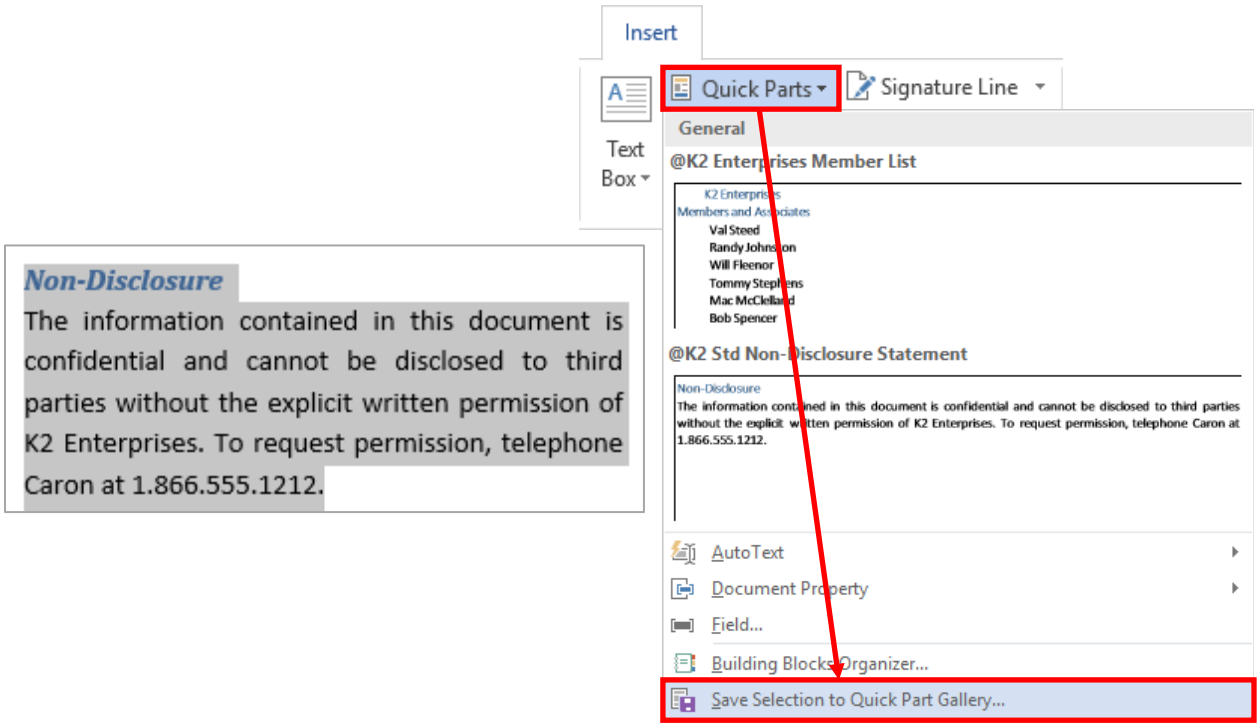


Figure 8 - Adding a Building Block to the Building Block Organizer

?	How will Building Blocks help you to save time when entering common passages of text into your Word documents?

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Managing AutoCorrect

AutoCorrect automatically corrects a variety of common errors while you work. The frustrating aspect of AutoCorrect is that it may change entered text into something not intended. For example, in default, AutoCorrect will automatically change "(c)" into the copyright symbol ©. Simply click the **Undo** button or press **CTRL + Z** to revert the text to what was originally entered. A better way to handle this problem is to adjust the Autocorrect settings so that this frustration does not occur repetitively. To modify AutoCorrect settings, click **File, Options** and then select **Proofing, AutoCorrect Options** in the **Options** pane on the right to open the Autocorrect dialog box as shown in **Figure 9**. There, you can change default settings and add, delete, or modify items in the **Replace With** list.

While adjusting AutoCorrect's default settings, you may wish to set up shorthand entries that Word will convert to longer phrases as you type. For example, someone who frequently writes audit, review, or compilation reports could set AutoCorrect to replace the phrase "GAAP" with "Generally Accepted Accounting Principles."

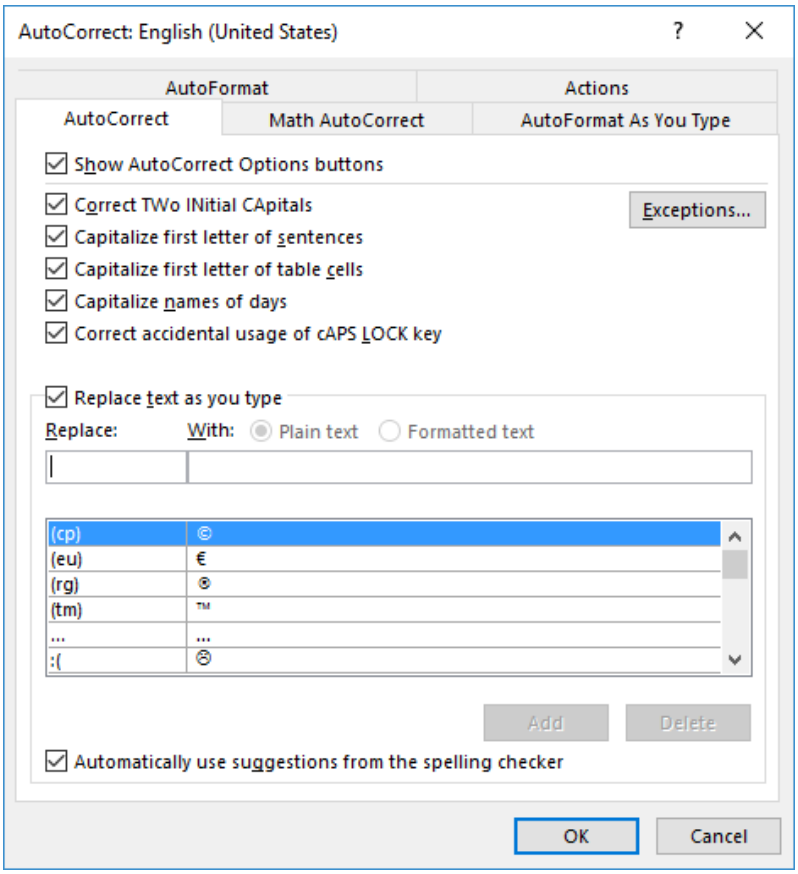


Figure 9 - AutoCorrect Dialog Box

Note that AutoCorrect is case-sensitive. Also, note that AutoCorrect is a shared tool across the Microsoft Office suite. Any changes made to AutoCorrect entries will appear in all Office

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applications. Thus, Excel, Outlook, and PowerPoint benefit from the changes made to AutoCorrect in Word, just as Word benefits from changes made to AutoCorrect in the other Office applications.

Working with the Normal Template

In default, every new document created in Word uses the **Normal** template (**normal.dotm)** as its foundation. Thus, when you create a new Word document, that document inherits all its formatting characteristics from normal.dotm. The frustration for most users is not knowing how to modify the default formats to their liking. To change the default formats in the Normal template, follow the simple steps outlined below.

1. Open or create a document that includes all the formatting characteristics to be present in the modified Normal template. For example, modify the font in the Normal style to be 12pt Times Roman.

2. In the **Modify Style** dialog box, make sure to select **New documents based on this document** and then click **OK** as shown in **Figure 10**. This will update the Normal template so that the default Normal style will be 12pt Times Roman.

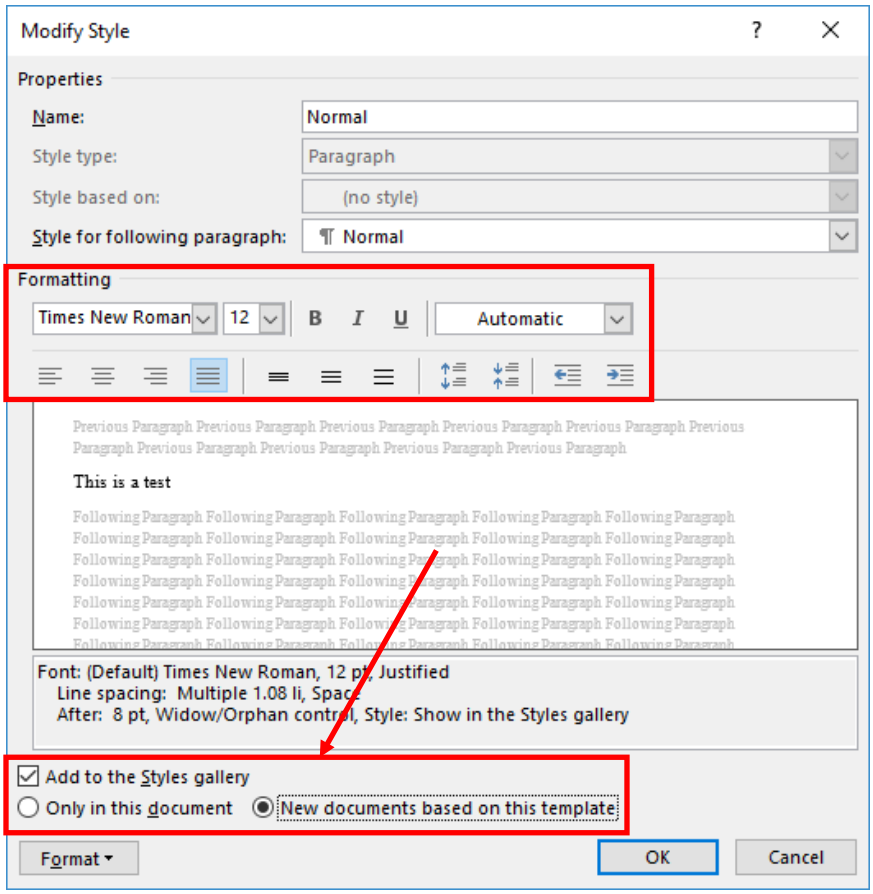


Figure 10 - Saving Modified Styles to Update the Normal Template

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Integrating Excel with Word

In assembling reports for printing, users often cut and paste financial data from Excel into Word. Other users link or embed Excel objects in Word using the Object Linking and Embedding (OLE) capabilities of Office and Windows. Pasting linked or embedded objects differs from pasting static text or financial data. With a linked or embedded object, it is possible to open and edit the object *in place*. In other words, a user can edit a linked or embedded Excel worksheet from within Word to save time and improve productivity.

Pasting Static Pictures

Pasting an Excel report or analysis as a picture into Word usually yields the best results. Simply highlight and copy the appropriate range (making sure not to exceed an area that will fit on one page) in Excel. Then, in Word, click **Paste, Paste Special** on the **Home** tab. Select **Picture (Enhanced Metafile)** and click **OK**. To remove the gridlines in the pasted picture, perform the following steps.

1. Right-click on the picture and choose **Properties** to open the **Format Picture** pane.
2. In the **Format Picture** pane, click the **Picture** icon at the top.
3. Expand the **Picture Corrections** section.
4. In the **Presets** drop-down gallery, select **Brightness: 0% (Normal) Contrast: +40%** to remove the gridlines as shown in **Figure 11**.

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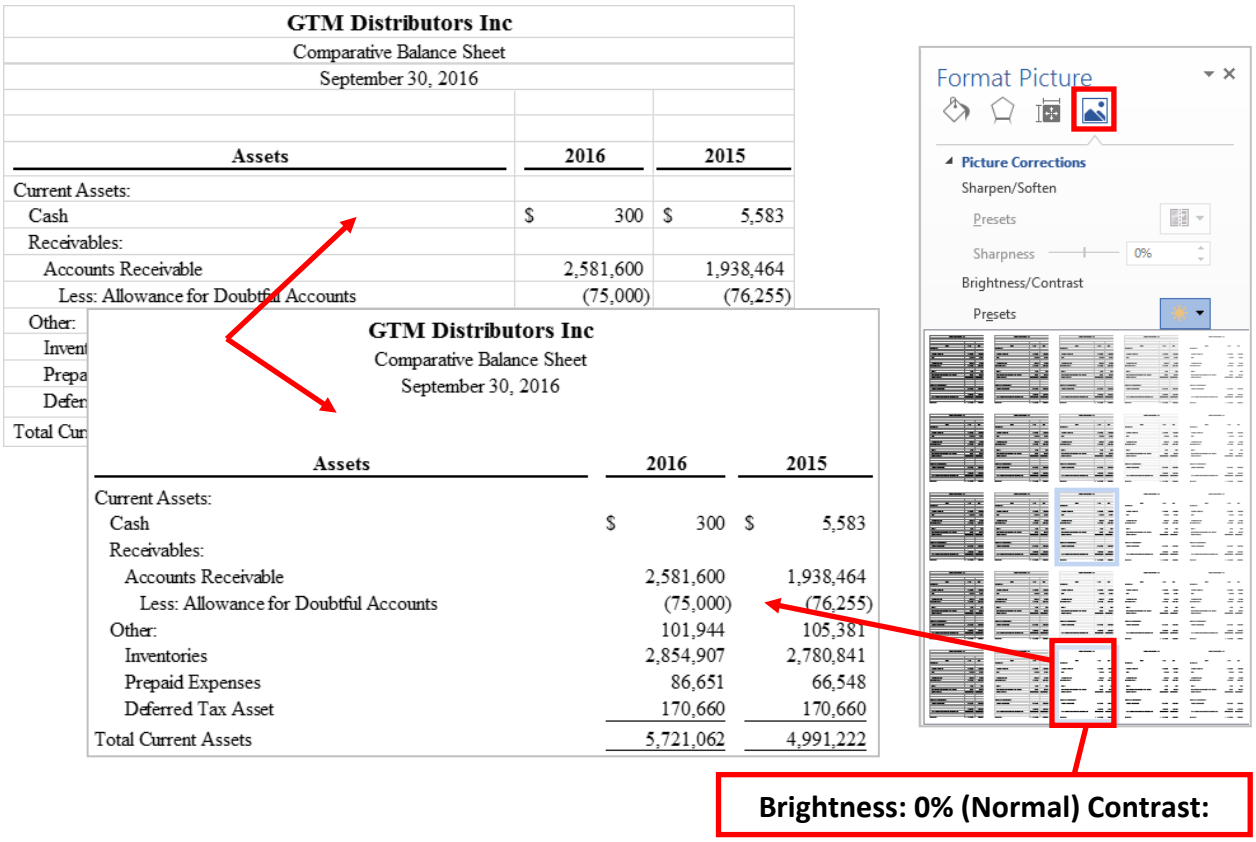


Figure 11 – Removing Gridlines from a Static Picture

Pasting Linked Pictures

Paste links whenever flow-through reporting is desired. That way, as the data in the linked Excel worksheet is modified, the updated data will flow through to the Word document. However, when pasting linked pictures into Word from Excel, the pasted pictures do not have the picture correction options available with static pictures. That is because the entirety of the picture (layout, formatting, gridlines, etc.) flows through from the linked source worksheet. To remove the gridlines in Word, you must turn off the gridlines in the linked worksheet in Excel. Note that enabling the gridlines later in Excel will again display them in the linked picture in Word. This behavior presents a problem for most users because they depend on the gridline structure for formula building and navigation. To remedy this situation requires a rethinking of the report creation and presentation process.

Most accountants build their analyses and reports for presentation or publication. Their work product *is* their presentation product. In a more sophisticated "flow-through" reporting environment, the work product and presentation product must be separated. In this case, we want the gridlines enabled for work but disabled for presentation. This can be accomplished easily by creating a presentation worksheet linked by formulas to the working worksheet within the same workbook. The gridlines are then disabled on the presentation worksheet, which serves

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as the source of the picture for linking into Word. Perform the following steps to create a presentation worksheet as shown in **Figure 12**.

1. Insert a new worksheet and name it **Balance Sheet Presentation**.
2. Highlight and copy the report of interest. In this example, highlight and copy the entire **Balance Sheet** consisting of the range **A1:C65**.
3. Position the cursor in cell **A1** on the new presentation worksheet and click **Paste, Paste Special** to open the **Paste Special** dialog box. Click **Paste Link** to build formulas in the new worksheet linked to the original data.
4. Without breaking the highlighted range, click **Paste, Paste Special** to open the **Paste Special** dialog box a second time. Select the **Format** radio button and click **OK** to paste the formats to the new worksheet.
5. Again, without breaking the highlighted range, click **Paste, Paste Special** to open the **Paste Special** dialog box a third time. Select the **Column widths** radio button and click **OK** to adjust the column widths in the new worksheet.

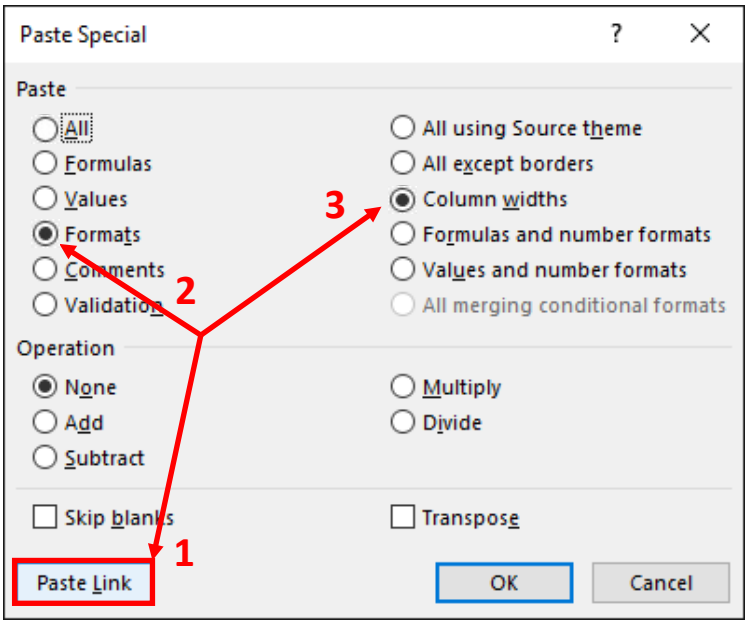


Figure 12 – Using a Triple-Paste Technique to Create a Presentation Worksheet

6. Note that blank cells in the original worksheet show up as zero in the presentation report. To eliminate the zeros, we need to modify the formula that was created by the process. Position your cursor in cell **A4**. Modify the formula so that it reads as follows.

=IF('Balance Sheet'!A4="","','Balance Sheet'!A4)

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7. Copy the formula down through cell **A65** using the **Auto Fill** handle, making sure to select **Fill Without Formatting** in the **Auto Fill Options** box. Without breaking the highlighted range, copy the formulas across to column **C**, again making sure to select **Fill Without Formatting** in the **Auto Fill Options** box. Turn off the gridlines to complete the task.

This straightforward process produces a worksheet that is identical to the original, except that it is built on formulas so that as the working sheet is updated, the changes flow through to the presentation sheet. It is this sheet that will serve as the source for linking pictures into Word. When using linked pictures, **Paste Special**, **Paste link**: **Bitmap** will usually yield the best results.

Linking Cells into Word

A powerful reporting technique is to embed and link single Excel cells within Word text. For example, an Excel workbook could contain a client's income statement. Whenever a related Word document refers to specific values in the income statement, the required values could be linked from the Excel workbook. Do the following to link single cells of Excel data into Word.

1. From within Excel, copy the appropriate cell to the clipboard.

2. In Word, put the cursor at the point where the Excel value is to be inserted.

3. From the **Home** tab, select **Paste, Paste Special, Paste link: Unformatted Text**. Make sure to select **Paste link** so that changes in Excel will flow through to the text in Word. Click **OK** to complete the operation. *Unformatted Text* is chosen so that the formatting of the inserted cell will match the style of the surrounding text in the Word document.

4. Insert spaces as desired to space the Excel value properly within surrounding text.

Figure 13 shows the process of pasting a single Excel cell into Word text. Note the **Paste link** selection on the left in the **Paste Special** dialog box. In this example, the reporting entity, reporting date, and all four amounts have been pasted from Excel with links. Each pasted value is treated as a field in Word, hence the gray shading when the cursor is positioned inside a value.

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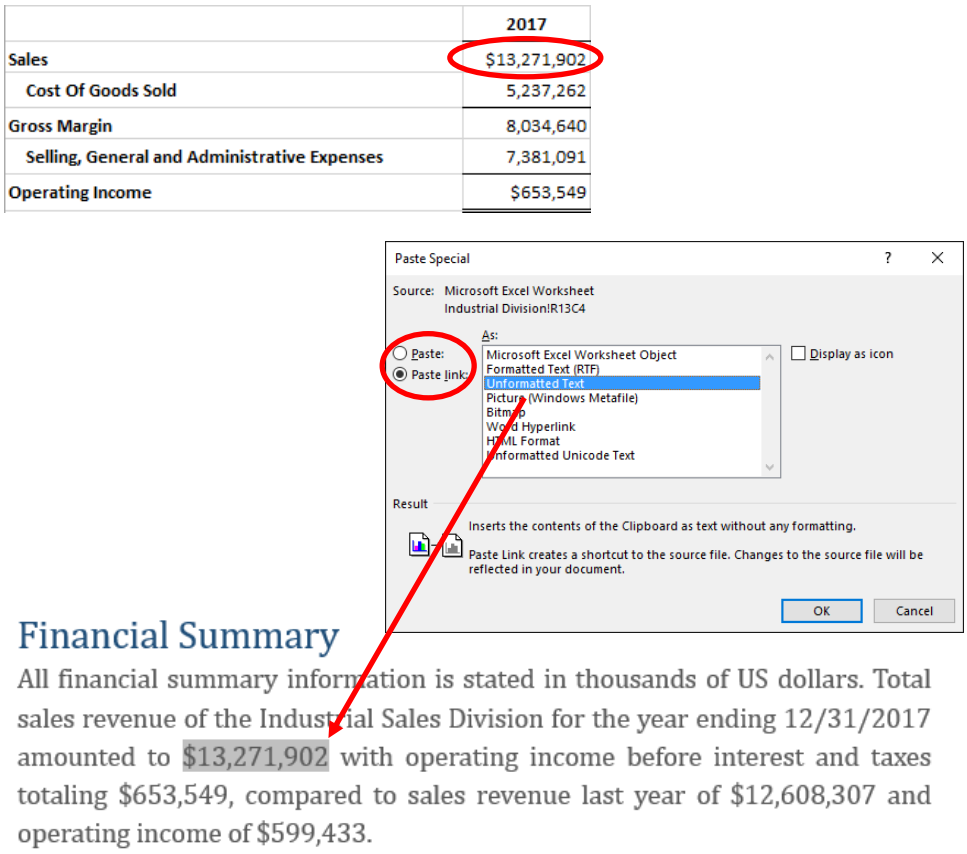


Figure 13 - Pasting Single Excel Cells into Word Text

Using SmartArt for Business Illustrations

SmartArt allows you to create presentation-quality illustrations to communicate your message more effectively. With SmartArt, you can create professional-looking business diagrams quickly and easily. SmartArt layouts range from lists to organization charts to step-by-step processes. Some SmartArt shapes have special placeholders for inserting pictures.

To create a business illustration, click **SmartArt** on the **Insert** tab. In the **Choose a SmartArt Graphic** dialog box, select a graphic type in the list on the left and then click on the desired SmartArt object in the pane on the right. **Figure 14** displays a SmartArt illustration of the budget cycle.

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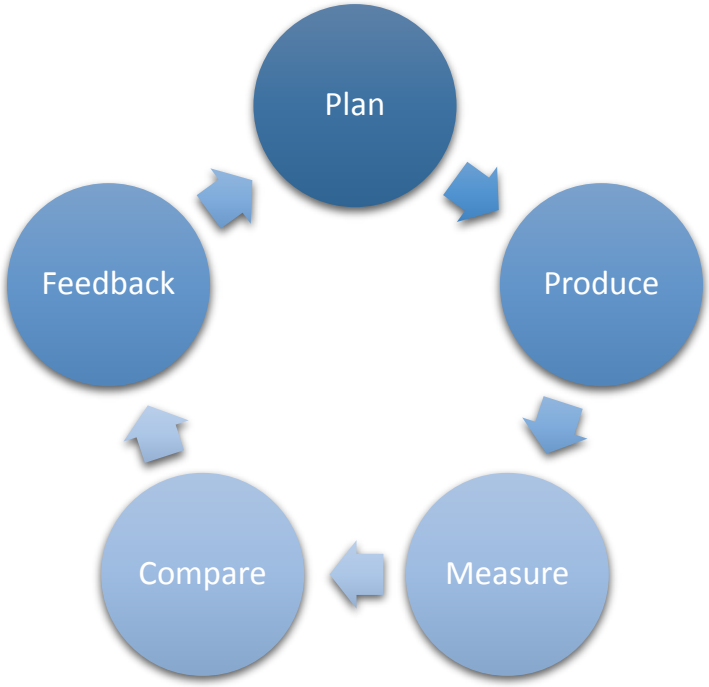


Figure 14 – Budget Cycle Illustration Produced with SmartArt

Using Charts for Effective Communication

When most users think of charts, Excel is the first tool that comes to mind. However, you can create and modify charts within Word in the same manner as you would in Excel. In fact, both applications use the same charting engine. To create a chart in Word, click **Insert, Chart** on the Ribbon and then select the desired chart type and click **OK**. Word will create an initial chart and insert an Excel data sheet to hold the chart data. you can add, edit, or delete the data as required. When the document is saved, the data sheet is imbedded in the document so that the data will be included with the document wherever it goes.

In situations where charts have already been created in Excel, you can copy and paste these charts into Word quickly and easily. Whenever an Excel chart is pasted into Word, the **Paste Options** box appears at the bottom right-hand corner of the pasted chart as shown in **Figure 15**. Select whether to link or to embed the chart and whether to keep the source formatting or to use the destination theme. Note that pasting a chart as a picture is the least desirable option available because a picture is a static image that cannot be edited in any way for presentation. You will not be able to adjust font sizes or colors or add animation to the chart for more effective presentation.

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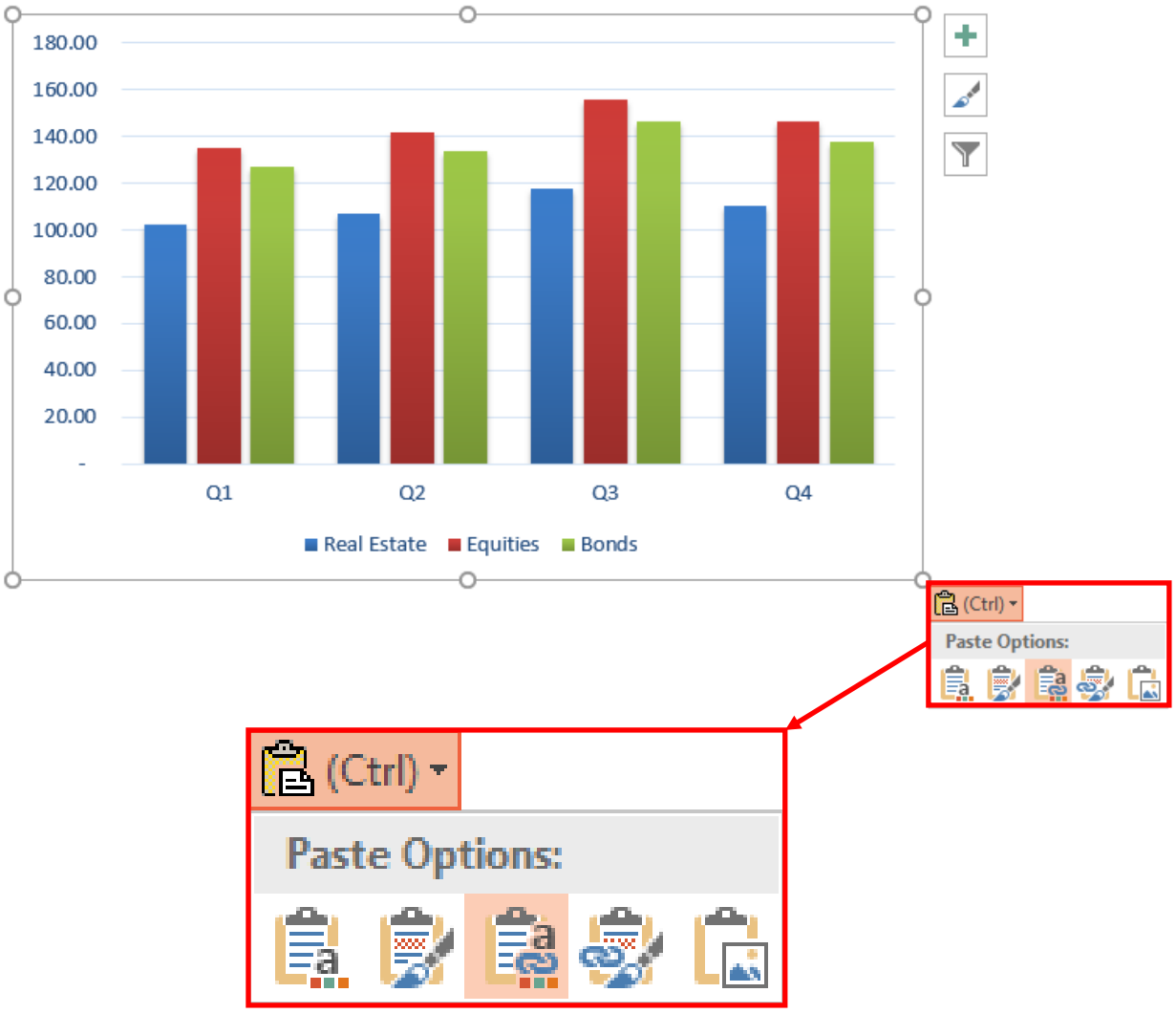


Figure 15 - Pasting an Excel Chart into Word or PowerPoint

Working with Tables

Tables are a feature in Word that many use, but few have mastered. Tables offer you the ability to organize volumes of information in easy-to-understand tabular formats, to add professional design elements to Word documents, and to create formulas in tables to perform calculations on numeric data. Tables can be added to Word documents by adding a Quick Table, by creating a table using the row and column grid or the Insert Table dialog box, by drawing a table with the mouse, by converting existing text to a table, or by inserting an Excel worksheet as a table.

Word includes nine built-in and preformatted Quick Tables. To add a Quick Table, click **Insert, Table, Quick Tables** and then click on the desired format to insert the table at the cursor. Replace the placeholder data and add or reformat table elements to complete the process. You may also save your own table formats as a Quick Table for future use. Simply select an existing table and

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then click **Insert, Table, Quick Tables, Save Selection to Quick Tables Gallery** to save a custom Quick Table.

To add a table to a document using the row and column grid, click **Insert, Table** and then use the mouse to highlight the desired table dimensions. **Figure 16** displays the creation of a 3 x 3 Table. Similarly, a table can be created using the Insert Table functionality. Click **Insert, Table, Insert Table** to open the **Insert Table** dialog box. Dial in the desired number of columns and rows, specify how to AutoFit the contents, and click **OK**.

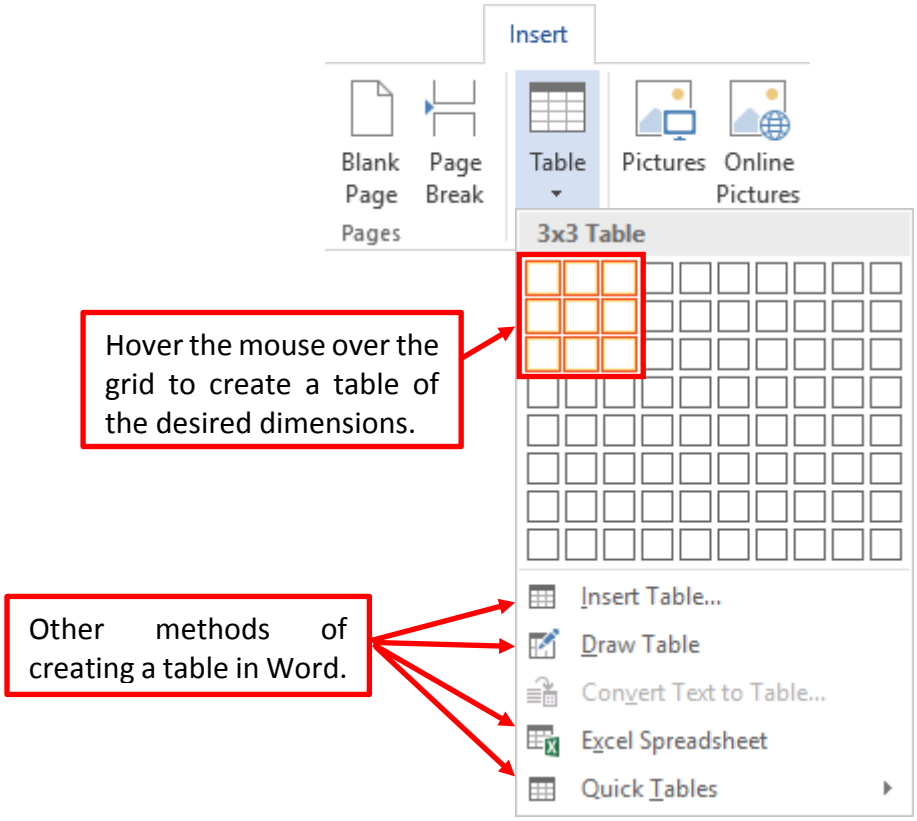


Figure 16 – Creating a Table Using the Row and Column Grid

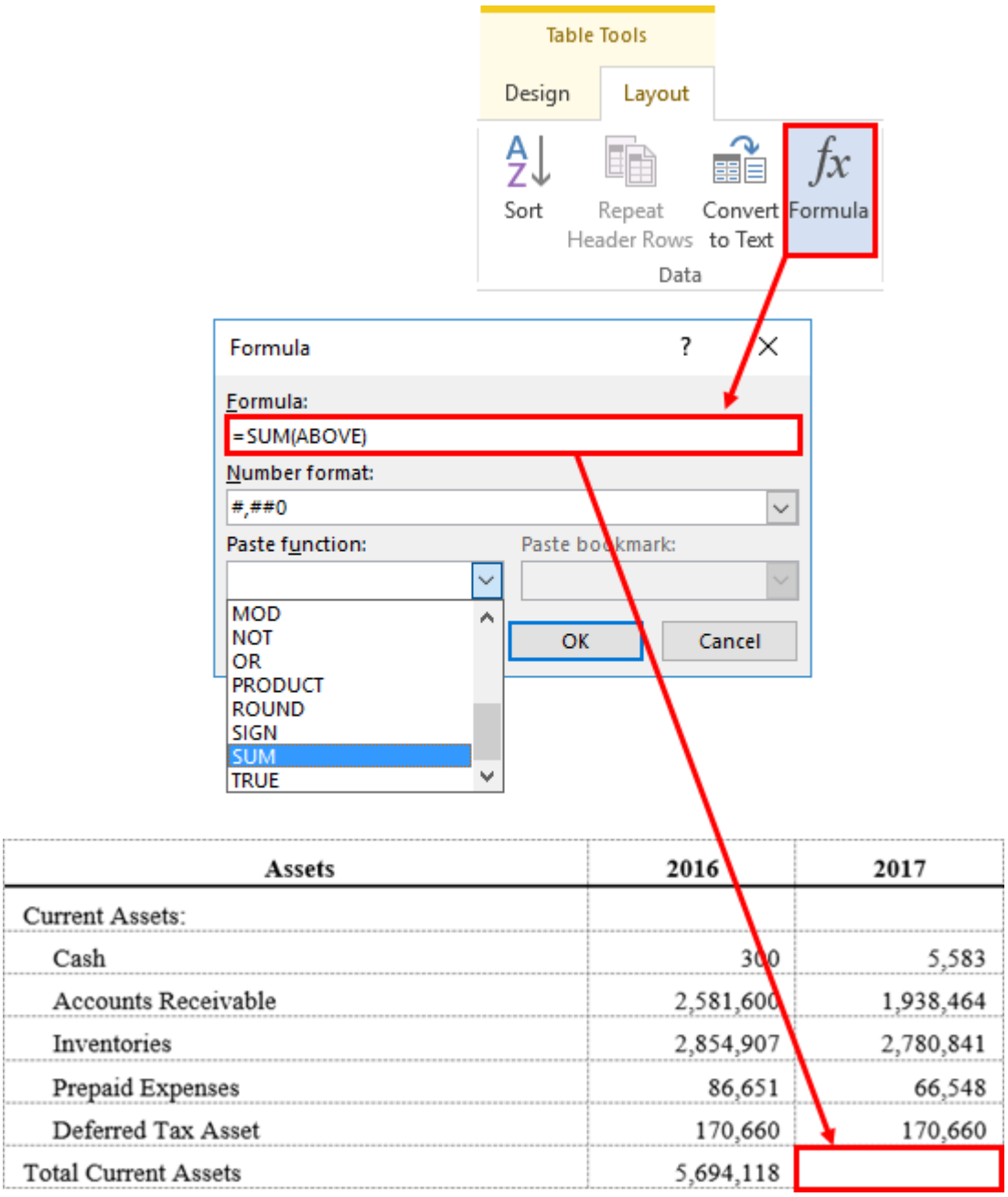
Once a table is created in Word, you can resize columns and rows, adjust fonts and align text to better fit within table cells, shade and apply borders, and adjust other formatting to better communicate your data. Of interest to accounting and other business professionals is the ability to create formulas to make calculations within tables. Word has eighteen functions for creating formulas in tables, identified in the following list. The formulas are used in conjunction with cell references, bookmarks, or positional arguments (ABOVE, BELOW, LEFT, and RIGHT) in some instances.

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ABS	IF	OR
AND	INT	PRODUCT
AVERAGE	MAX	ROUND
COUNT	MIN	SIGN
DEFINED	MOD	SUM
FALSE	NOT	TRUE

To create a formula in a table, position the cursor within the table at the point where the formula is desired. Then, click **Table Tools, Layout, Formula** to open the **Formula** dialog box. Select the desired function and enter the cell reference, bookmark name, or positional parameter as shown in **Figure 17**.

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Assets	2016	2017
Current Assets:		
Cash	300	5,583
Accounts Receivable	2,581,600	1,938,464
Inventories	2,854,907	2,780,841
Prepaid Expenses	86,651	66,548
Deferred Tax Asset	170,660	170,660
Total Current Assets	5,694,118	

Figure 17 - Using a Formula to Calculate Total Current Assets

The result of a formula is calculated when it is inserted and when the document containing the formula is opened. Individual formulas can be recalculated on demand. To update a calculation, click on the formula and press **F9**. Alternatively, right-click on the formula and select **Update Field** in the context-sensitive menu. Similarly, all formulas in a single table or all formulas in an entire document can be calculated by selecting the table or the entire document (**CTRL + A**) and pressing **F9**.

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The obvious limitations of table formulas can be overcome by embedding an Excel worksheet in a Word document as a table. This process takes full advantage of the object linking and embedding (OLE) functionality of Microsoft Office. When an embedded worksheet is active, Word morphs into Excel, and the full calculation and formatting functionality of Excel is available. To insert an Excel worksheet as a table, click **Insert, Table, Excel Spreadsheet**. **Figure 18** shows an embedded Excel worksheet being edited within Word.

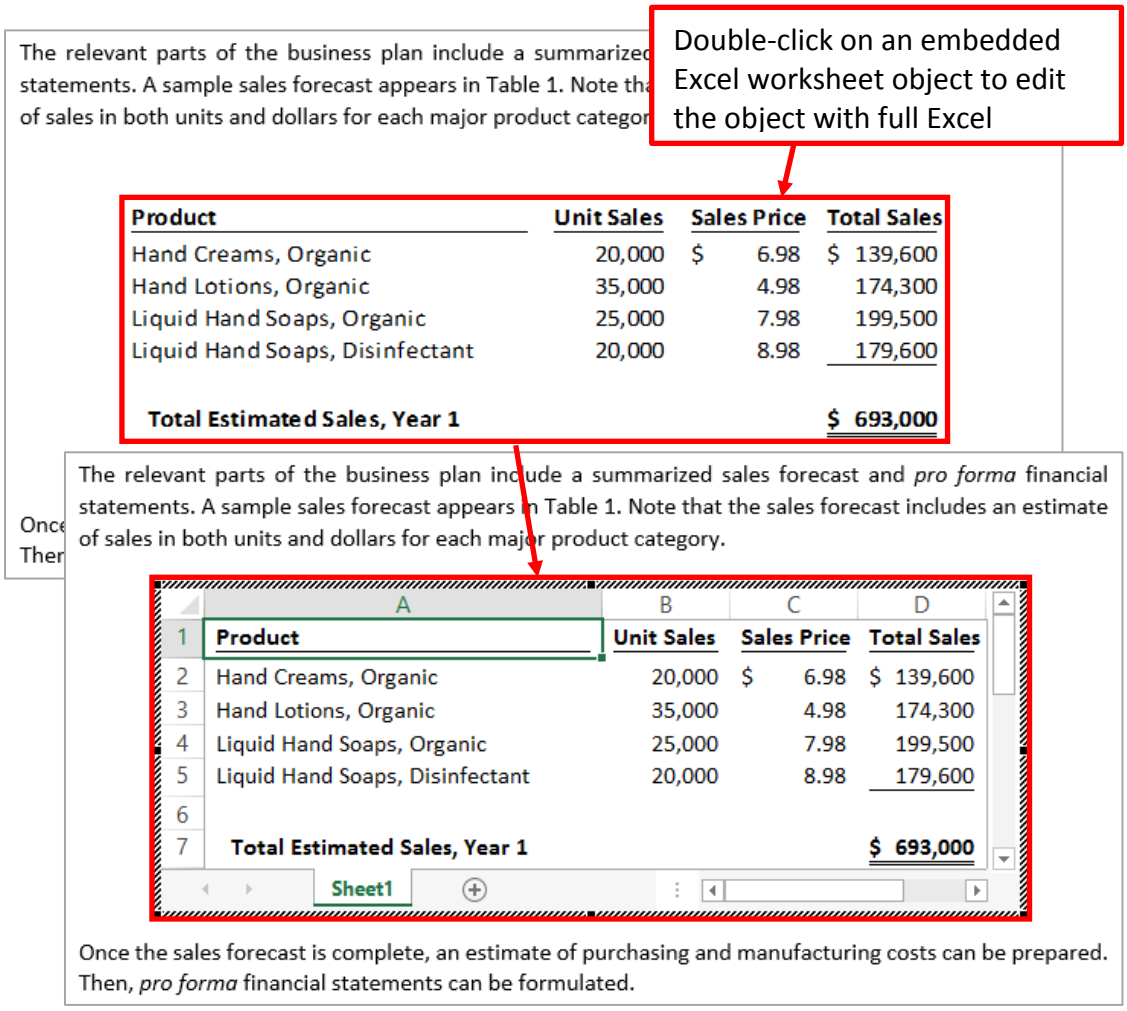


Figure 18 - Editing an Embedded Excel Worksheet Object

?	Given what you have learned in this chapter, how might you change the way you integrate data in Excel with your Word documents? Are the opportunities for improved efficiencies in that process?

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Taking Control Of Microsoft Outlook

Chapter 2

If you feel that you would get a lot more work done in the office if you did not have to deal with email and other information in Outlook, you are not alone. Recent research shows that one of the greatest threats to staff productivity is workplace distraction, and most users would agree that email is the most significant source of distraction in the office.[1] What began in the early 1990s as a productivity enhancing application has become a nightmare for most business professionals. For many, email consumes more time and effort than almost any other workplace activity. Some receive hundreds of messages daily, most of them worthless SPAM. If you want to improve your personal productivity and return some semblance of order to your workday, taking control of email and other Outlook-based content should be a top priority.

Learning Objectives

Upon completing this chapter, you should be able to:

- Configure Outlook to reduce interruptions and distractions;
- Utilize Conversation View to find related messages;
- Create QuickSteps to automate routine processes;
- Improve efficiency with Outlook's Instant Search feature; and
- Avoid re-keying data with drag-and-drop capabilities.

Reduce Interruptions

Unfortunately, some of the default settings in Outlook do not help you work efficiently. For example, when an email message arrives, Outlook plays a sound, briefly changes the mouse pointer, shows an envelope icon in the taskbar, and displays a desktop alert. These interruptions hamper productivity. No sooner do you start a task than Outlook cries out, "You've got mail," and the interruptions continue throughout the day.

[1] Dr. Gloria Mark, University of California – Irvine, quoted by Farhad Manjoo, "Discovering Two Screens Aren't Better Than One," *The New York Times Online Edition*, March 19, 2014.

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A better way for many to handle email is to disable all notifications and check email on a fixed schedule. For example, you could check email five times a day – when you arrive at work in the morning, just before or after your morning break, lunch, and afternoon break, and just before leaving the office in the evening. Interruptions are minimized because email is handled during natural pauses in your workday. You can configure Outlook to alert you when messages from specific people arrive even though message notifications have been disabled.

To disable email arrival notifications, do the following.

In Outlook, click **File, Options** to open the **Outlook Options** dialog box. Click **Mail** in the navigation pane on the left and then scroll to the **Message Arrival** section in the options pane on the right as shown in **Figure 19**. Uncheck **Play a sound**, **Briefly change the mouse pointer**, **Show an envelope in the taskbar**, and **Display a Desktop Alert**. Click **OK** to commit your changes.

With that simple change, email interruptions will be banished from your workday. Keep in mind that you may suffer withdrawal pains from the respite, so make sure to resist the temptation to check email manually until you have become fully accustomed to your new routine.

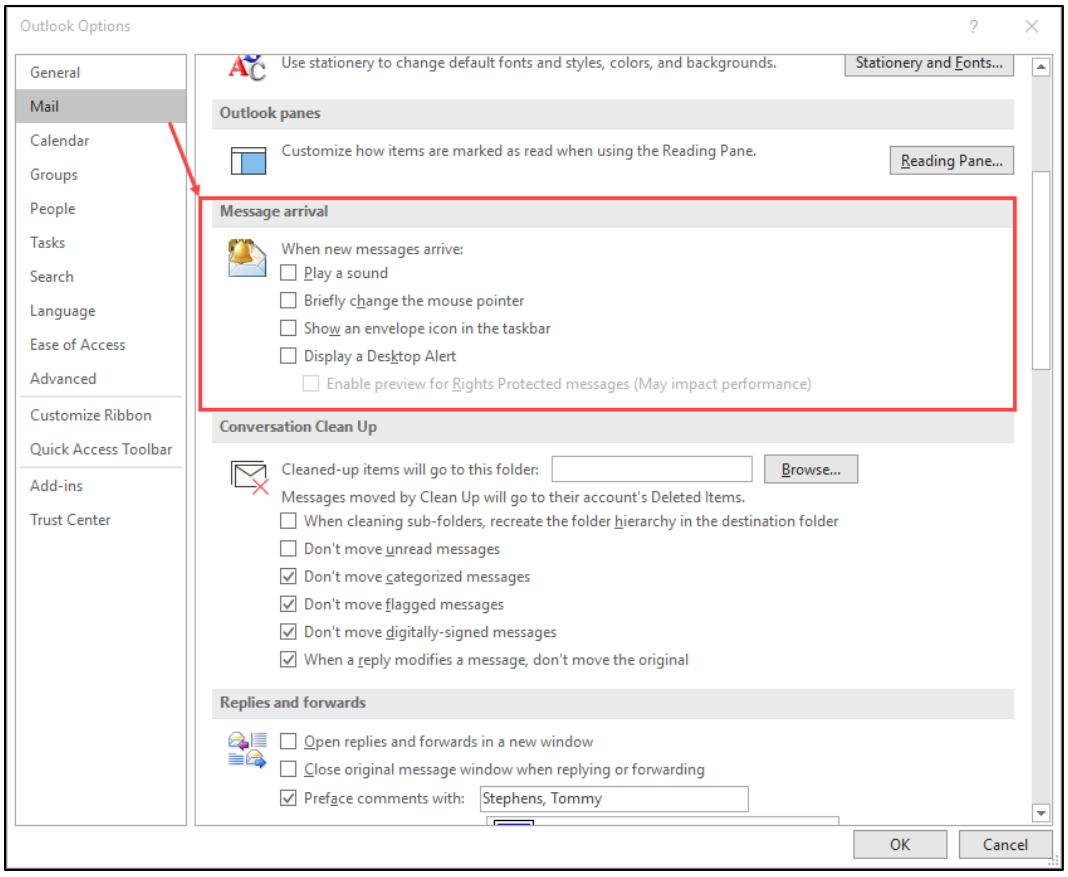


Figure 19 - Disabling Message Arrival Notifications in Outlook

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Manage Outlook's Junk Mail Filter

Once you have reduced or eliminated the continuous interruptions generated by incoming email, the next problem to tackle should be junk mail. Make sure that the built-in Junk E-mail filter is enabled and set the level of junk email protection to "high."

To enable the Junk E-mail filter, do the following.

1. In Outlook, select **Junk, Junk E-mail Options** on the **Home** tab.

2. In the **Junk E-mail Options** dialog box, set the level of junk email protection to **High** and uncheck **Permanently delete suspected junk e-mail instead of moving it to the Junk E-mail folder** as shown in **Figure 20**. Click **OK** to save your changes.

At this point, you should review your Junk E-mail folder daily to make sure that valid email has not been blocked by the filter. Any time a valid email is filtered improperly, steps should be taken to alter the filter's actions. In Outlook, right-click on the valid message and select **Junk, Never Block Sender** or **Never Block Sender's Domain**. Then, select **Junk, Not Junk** to move the message back to the Inbox.

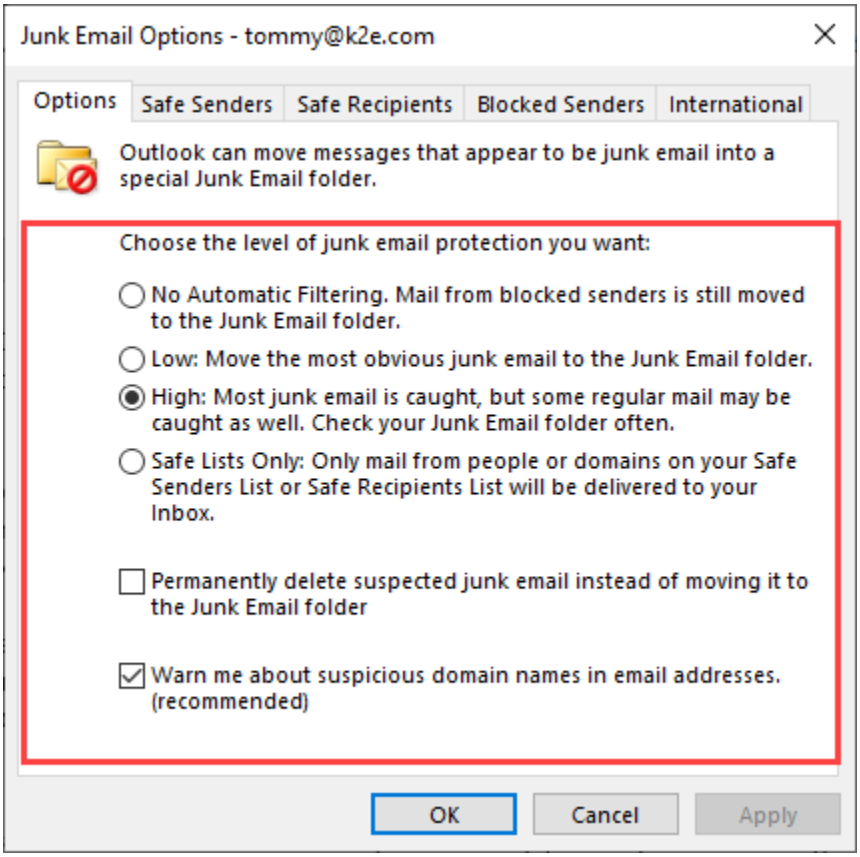


Figure 20 - Enabling the Junk E-Mail Filter

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Similarly, when junk email gets through to your Inbox, make sure to update the filter to catch the junk in the future. In Outlook, right-click on the valid message and select **Junk, Block Sender**. Taking a few minutes to keep the junk filter up to date will pay big dividends in the long term.

Triage the Inbox Rapidly

The preceding tips eliminate or reduce junk email and the number of interruptions that most users experience on a daily basis, but they do not help with the cumbersome and time-consuming task of clearing our Inbox or taking action on important message requests. The following tips and tricks are designed to help you triage your Inbox rapidly.

Make the Message List Work for You

The message list can be sorted in ascending or descending order along an array of pre-defined dimensions with just a few clicks from the top of the Message List. Messages can be sorted by date, category, subject, whether the message has attachments, or from whom the message was sent, etc. Messages can also be grouped within dimension to fit your needs. The groups can be expanded or collapsed individually or all at once.

Microsoft has added several new features to the Message List over the past few releases to Outlook. These features make it easier to triage your Inbox. The Message List now has filter buttons to display “focused” messages and “other” messages, as shown in **Figure 21**. A “focused” message is when that Outlook deems to be relatively important, based on your email activity. On the other hand, an “other” message represents a message that likely is not as important as a focused message. A single click rapidly filters the list to display the messages desired. Further, unread messages are identified by the colored bar on the left edge of the message header. If you would prefer for Outlook not to segregate your messages into “focused” and “other” categories, you can change that setting on the **View** tab of the Ribbon by clicking the **Show Focused Inbox** icon.

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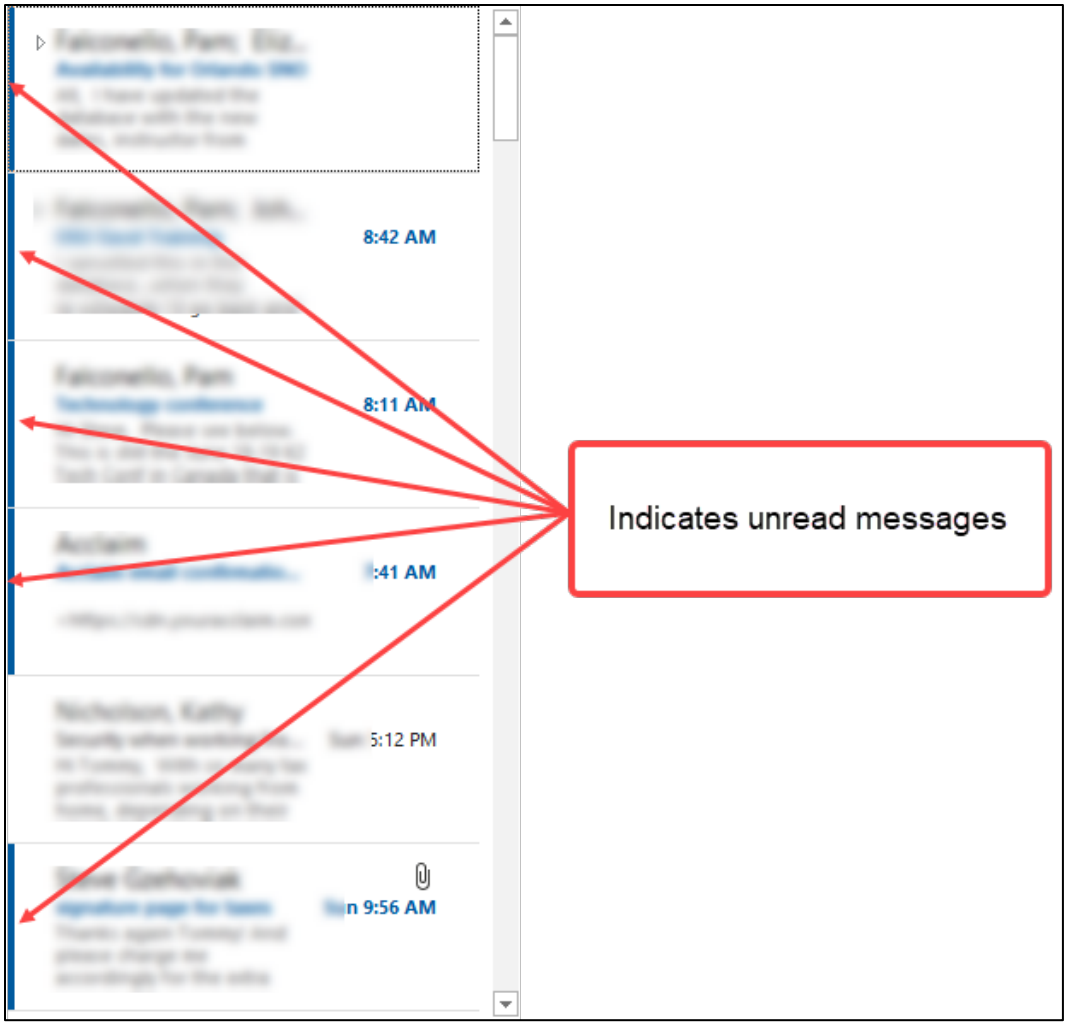


Figure 21 – Easily Identify or Filter Unread Messages

The Message List can be filtered to display only unread messages in earlier versions. In Outlook, click **Filter E-mail** on the **Home** tab and select **Unread** or click in the **Search** box at the top of the Message List and select **Filter Email** to access your desired filter. The **Filter E-mail** button can be added to the Quick Access Toolbar for convenience.

In Outlook, the message header can be set to reveal from one to three lines of the message itself. This helps you focus your time on those messages that require your attention first. To set the number of message lines displayed in the message header, select **View, Message Preview** on the Ribbon. In default, the Message Preview is set to display two message lines. For maximum impact, set it to three. On large monitors, widen the Message List so that more of the message is displayed in the preview.

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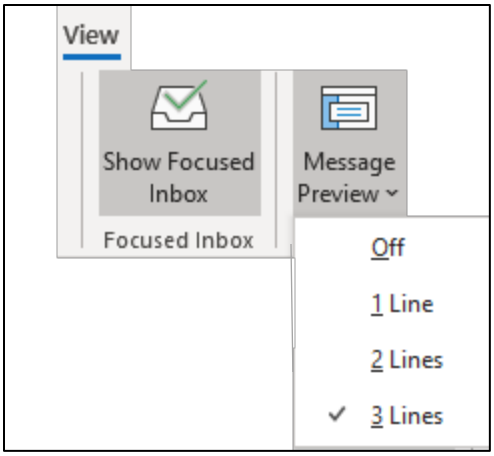


Figure 22 – Adjusting the Message Preview

Messages can be acted upon directly within the Message List in Outlook without resorting to the context-sensitive menu. Messages can be flagged for action, deleted, or marked as read or unread as shown in **Figure 23**. This is especially useful for those using touch devices.

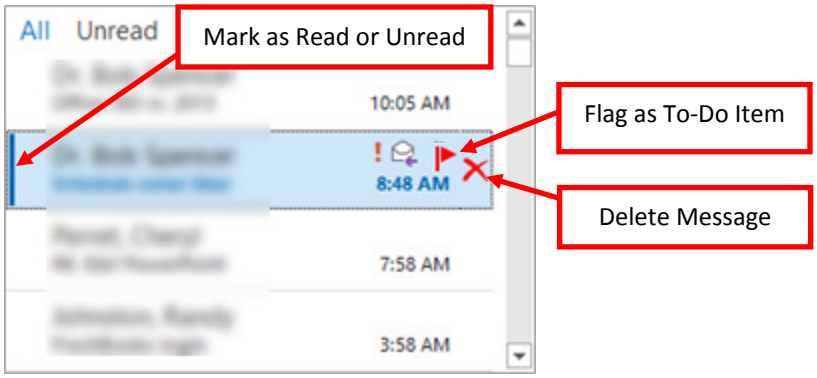


Figure 23 – Action a Message within the Message List

Minimize Annoying Windows with In-line Reply and Forward

Beginning with Outlook 2013, you can reply or forward a message directly from the Reading Pane. Click the desired action, and the Reading Pane becomes an editing pane with most formatting capabilities as shown in **Figure 24**.

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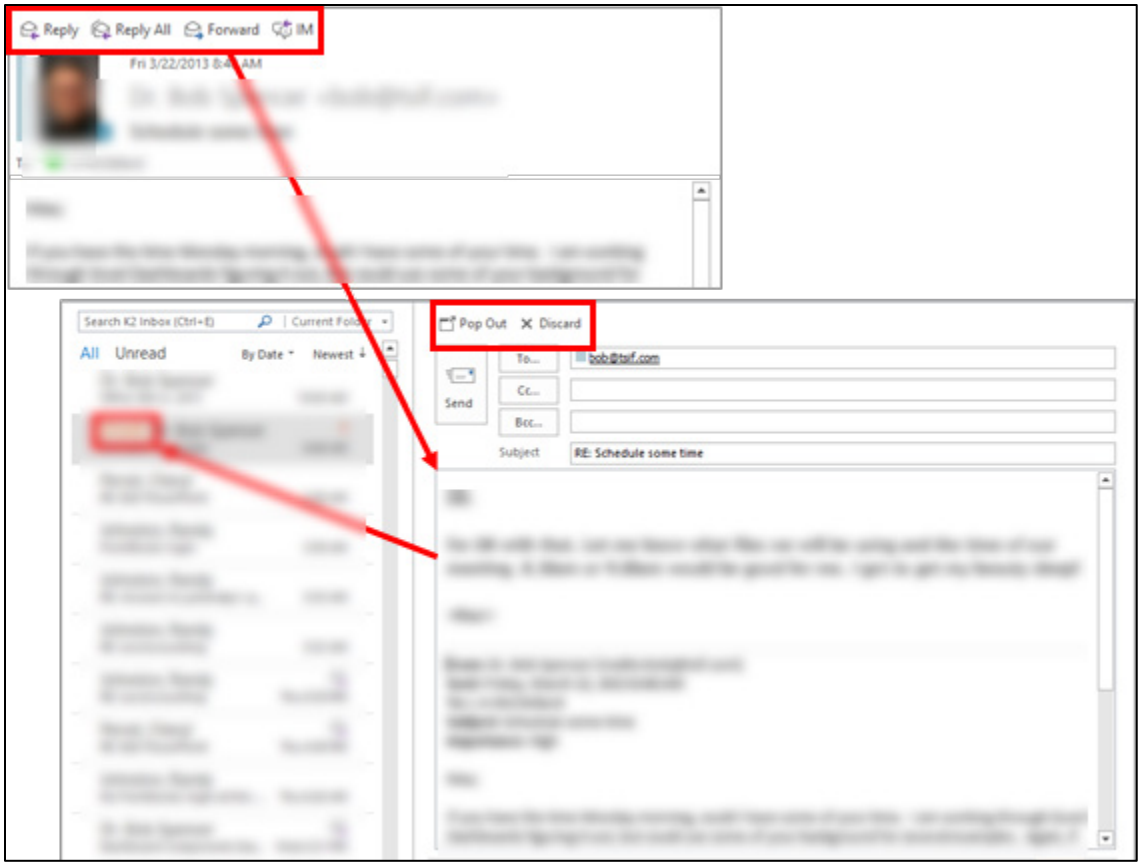


Figure 24 – Replying to a Message from within the Reading Pane

For those requiring more formatting options than are normally available when composing a reply within the Reading Pane, you can **Pop Out** the message into a new window. While the message is being composed, "**[Draft]**" will be displayed in the message header. If a user moves away from the message before sending the response, the response will be accessible from the Drafts folder for further action, and the message header will continue to be marked "[Draft]" in the original folder. To delete a reply before sending, simply click **Discard**.

Find Related Messages with Conversation View

Business professionals often need to refer to an earlier message in a message thread to confirm an action request. One way to accomplish that goal is to find all related communications to a message of interest. In Outlook, right-click on a message and select **Find Related, Messages in this Conversation**. In both instances, the process finds all related messages regardless of the folder in which the messages are filed.

Alternatively, you can view email messages by Conversation in Outlook. When **Conversation View** is enabled, messages in the Message List that *share the same subject* can be viewed in a single thread. You can quickly review and act on individual messages or a complete Conversation. Conversations are identified in the Message List with a white arrow point. The messages *within*

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each Conversation are sorted with the newest message at the top of the expanded list. As new messages in the thread are received, the entire Conversation is positioned in the Message List in the date order currently active. When you click on a Conversation header in the Message List, the newest message in the thread is displayed in the Reading Pane. Any Conversation that contains unread messages has a bold subject in the message header along with a count of the unread messages in the thread. Expanded Conversations display any unread messages with a bold heading. In default, Conversations include all related messages regardless of the folder in which they are filed. For example, messages sent by a user are typically saved in the Sent Items folder, but will appear and be grouped in a Conversation with messages in the Inbox as shown in **Figure 25**.

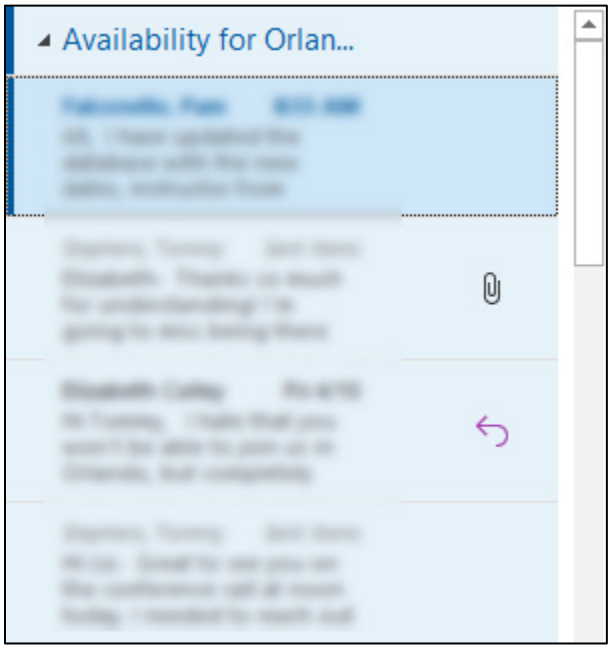


Figure 25 – Conversation Thread Expanded in the Message List

To view messages in Conversations, the Message List must be arranged in date order. To enable Conversations in Outlook, check **Show as Conversations** on the **View** tab. Alternatively, click on the **Arrange By** (sort) drop-down at the top of the Message List and select **Show as Conversations**.

By design, Outlook groups Conversations subject. Messages with the same subject are grouped in a Conversation, even if the messages are unrelated. This may cause problems for some users who send or receive messages with commonly used subjects.

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Automate Routine Mail Processes with Quick Steps

Repetitive, multistep procedures can be converted to single clicks with Quick Steps in Outlook. Think of Quick Steps as a macro creation tool that allows you to automate the Inbox triage process. For example, if you forward messages to your manager frequently, the conventional process requires opening and addressing the forwarded message before adding comments to the message itself. A custom Quick Step can eliminate the first two steps in the process and possibly all three. Quick Steps are executed from the **Quick Steps** gallery on the **Home** tab. The first time a user executes one of the six pre-configured Quick Steps, Outlook prompts the user to specify any required details and rename the Quick Step, if desired, as shown in **Figure 26**.

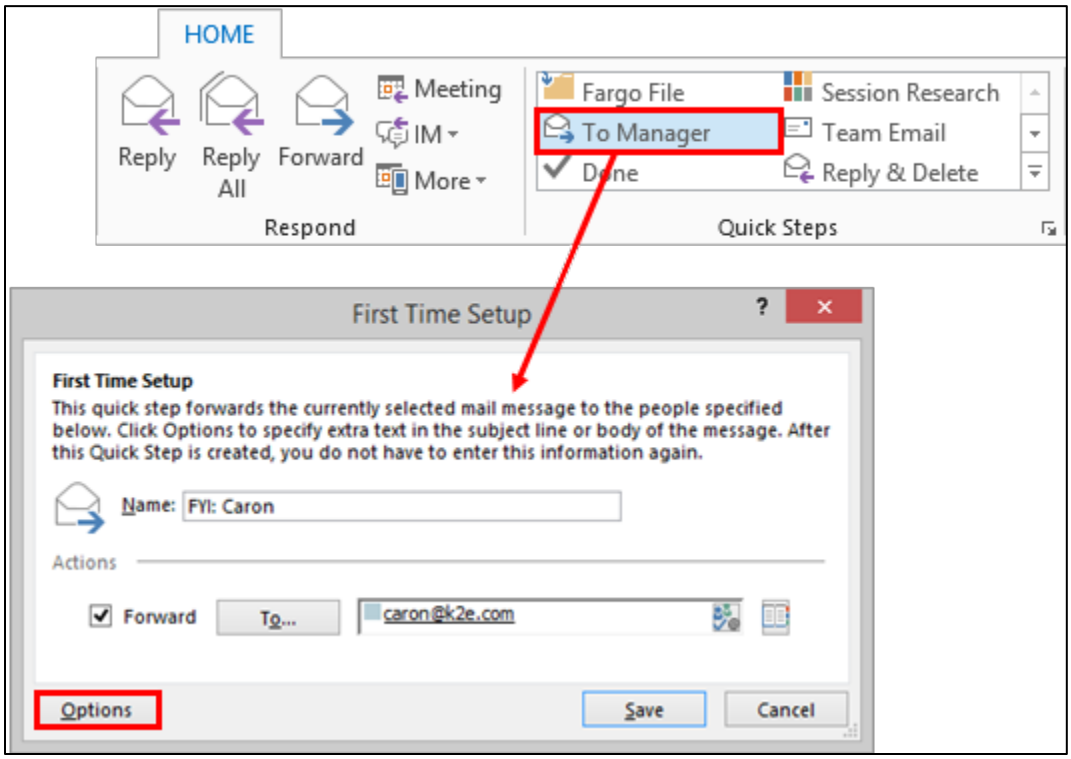


Figure 26 – Customizing a Quick Step on First Use

To add additional actions or to customize the Quick Step beyond the simple customizations illustrated, click **Options** to open the **Edit Quick Step** dialog box as shown in **Figure 27**. To access all available options, click the **Show Options** link. In this case, notice that the subject, flag, and importance can be set along with a custom text message and a keyboard shortcut. More importantly, additional actions can be added to the Quick Step so that multistep processes can be accomplished with a single click.

To edit an existing Quick Step, click the drop-down arrow in the lower right-hand corner of the **Quick Step** gallery and select **Manage Quick Steps**.

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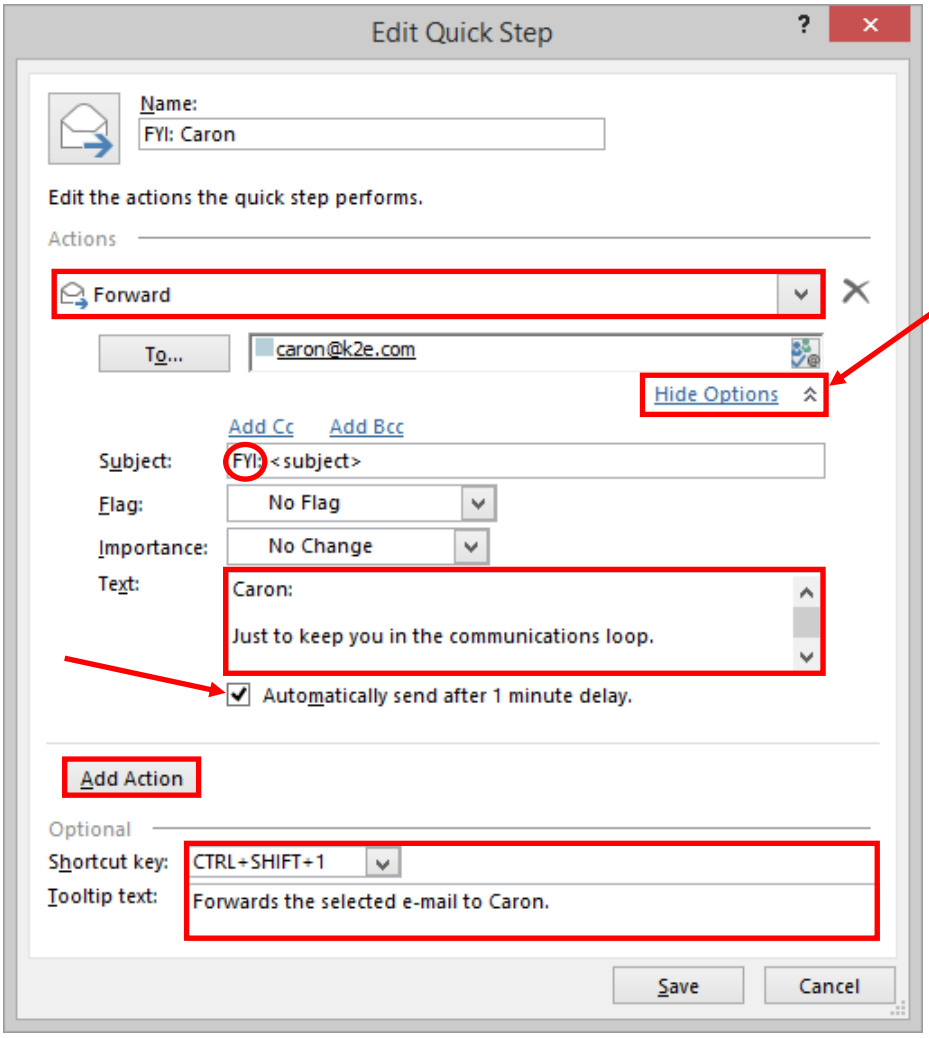


Figure 27 – Adding More Complex Customizations to a Quick Step

Flag Messages for Follow-up

When you receive a message that requires action, flag it for follow-up. In the message list, simply click on the flag icon in a message header to add the message to the Task List with the **Due Date** set to **Today**. Alternatively, right-click on the flag icon to select from several built-in follow-up periods or to create a custom due date as shown in **Figure 28**. You can set the default due date to meet your needs by selecting **Set Quick Click** from the context-sensitive menu.

Flagging a message for follow-up does **not** create a separate new Task item. It merely adds the flagged message to the Task List. If the task item is deleted from the Task List, the associated message is also deleted. This causes great frustration for users who routinely clear their Task List by deleting completed items because that process prevents them from finding or referring to previously actioned messages. Instead, mark an item *complete* by clicking the flag icon in the Task List. The flagged message will disappear immediately from the Task List but will remain in the Message List, marked with a green checkmark to indicate that action has been taken. Similarly,

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flagged messages can be marked complete directly from the Message List. Simply click on the flag in a message header to change it to a green checkmark and remove the message from the Task List.

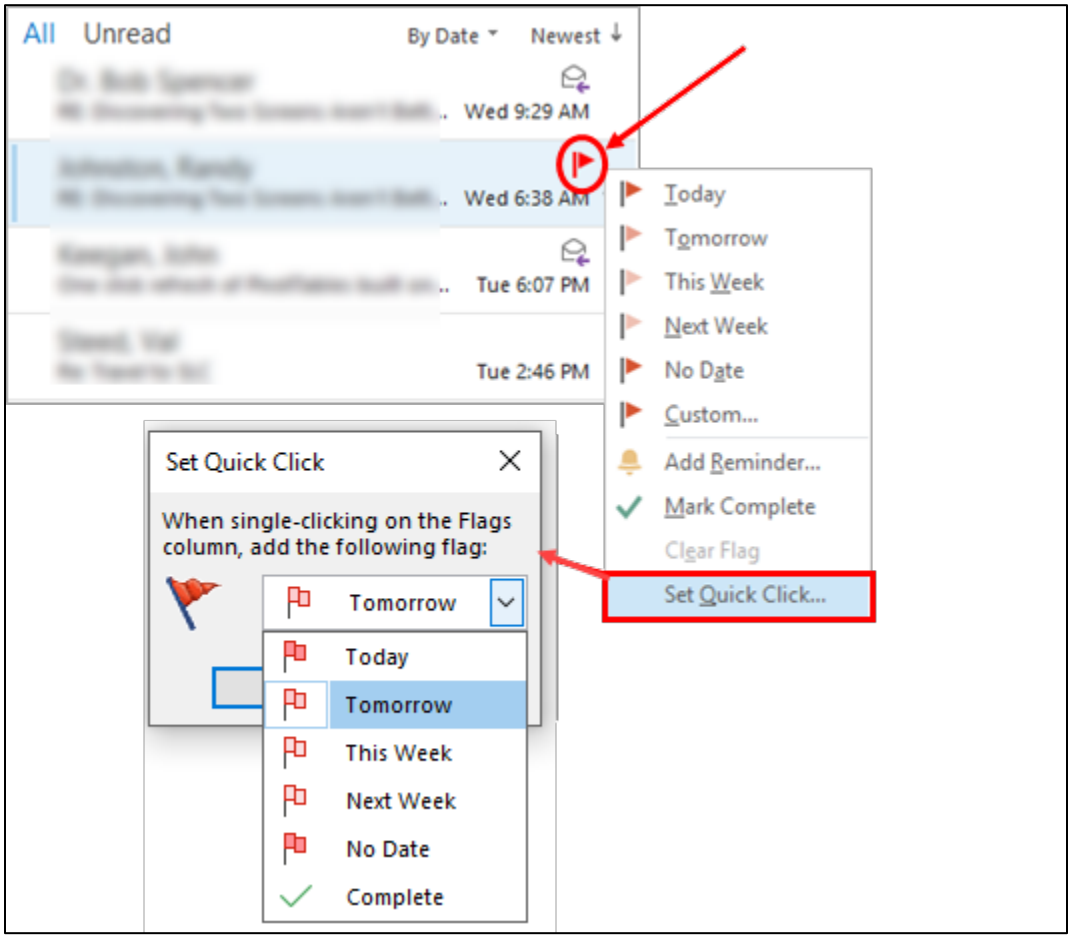


Figure 28 – Creating a Task Item by Flagging a Message for Follow-up

You can also flag outgoing messages to remind recipients of some event or requested action. For example, if a report is due next Friday, a manager could send an email message to her subordinate reminding him of the due date. The manager could also flag the message to display a reminder to her subordinate on the date and time of her choosing. To flag a message for a recipient, click the **Follow-Up** button on the **Message** tab of the message window and select **Flag for Recipients**.

Find Anything Quickly with Instant Search

When you need to find messages related to specific issues or from specific people, you should not scroll endlessly through your messages, or sort the message list on a sender's name; instead, use **Instant Search**. Just type a key word or a person's name in the search box at the top of the message list, and you will find what you are looking for in just a few seconds. Instant Search was

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introduced in Outlook 2007, but newer versions of Outlook make it easier and more intuitive for you to narrow your search results by adding search criteria. Whenever you click in the **Search** box at the top of the Message List, the **Search Tools** contextual tab is displayed as shown in **Figure 29**. You can select from a wide variety of criteria – *From*, *Subject*, *Has Attachments*, *etc*. – and can select from a list of locations to search – *All Mailboxes*, *Current Mailbox*, *Current Folder*, *Subfolders*, *All Mail Items*, or *All Outlook Items*. If the desired criteria are not exposed on the Search Tools contextual tab, click **More** for a complete list of search fields. The criteria for the ten most recent searches are maintained in the **Recent Searches** drop-down list.

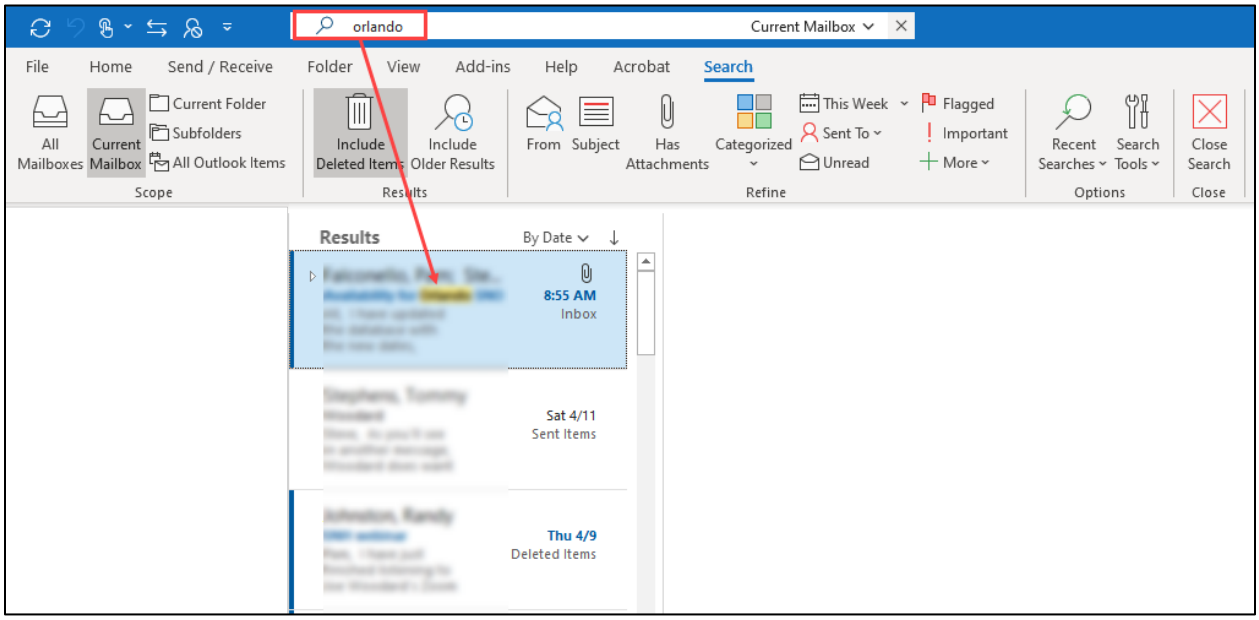


Figure 29 – Search Tools Contextual Tab

You can easily specify what locations to search with a drop-down menu just to the right of the **Search** box in Outlook as shown in Figure 29. The **Current Mailbox** is the default search location. The default location can be modified in Outlook options. Click **File, Options, Search** to set the location of your choice.

Avoid Re-keying Data – Use Drag-and-Drop Instead

Email messages often precipitate the creation of new tasks or appointments. Do not use the keyboard to create these tasks or appointments; use drag-and-drop instead. Simply drag a message from the Message List and drop it on the Calendar button to create a new appointment automatically. An added benefit is that the body of the message will be embedded in the body of the appointment so that any critical information or needed explanation is available at your fingertips in preparing for the meeting. Additionally, Outlook allows you to drag-and-drop all types of items to organize or create additional items quickly and easily. Here are some of the most useful and time-saving ways that you can organize your communications, calendar, and tasks.

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- Organize your messages by dragging them from the Message List and dropping them into other folders in the Folder List.
- Create new tasks by dragging messages to the Tasks button. The subject of the message becomes the title of the task, and the message body is contained in the task notes.
- Create new or update existing Contacts by dragging messages to the Contacts button. The message body is added to the Notes field of the contact. Outlook will display any proposed updates to existing Contacts for user confirmation.
- Create new appointments by dragging messages to the Calendar button. The subject of the message becomes the title of the calendar item, and the message is contained in the calendar notes.
- Create new email messages by dragging contacts to the Mail button.
- Put tasks on your calendar by dragging tasks to the Calendar button. The title of the task becomes the title of the calendar item, and the task detail is contained in the item's notes.
- Create reminder messages for appointments by dragging appointments to the Mail button. The title of the appointment becomes the subject of the message, and the calendar detail is included in the message body.

These are just a few of the ways you can put drag-and-drop processes to work in Outlook. Almost any Outlook item can be used to create another Outlook item quickly and easily using this process. This functionality eliminates the need to rekey information and dramatically improves user productivity.

Build a Complete Record

Have you ever scheduled an appointment or task and then had to search for its related source documents when the task or appointment came due? Instead of working with multiple discrete items, use drag-and-drop to build a complete record when the appointment or task is scheduled. If an email message precipitates the task or appointment, create the item by dragging-and-dropping the message to the appropriate button. Then, drag documents and contacts into the body of the task or appointment as they become available. When the task or appointment comes due, all the related supporting information and documentation will be in the body of the item, thereby saving time and effort.

Figure 30 shows a task that was created in Outlook. In building the complete record, all the necessary files and the contact records for others involved in the process have been dragged into the task. When the task comes due, all the needed documents and information will be readily available to the user.

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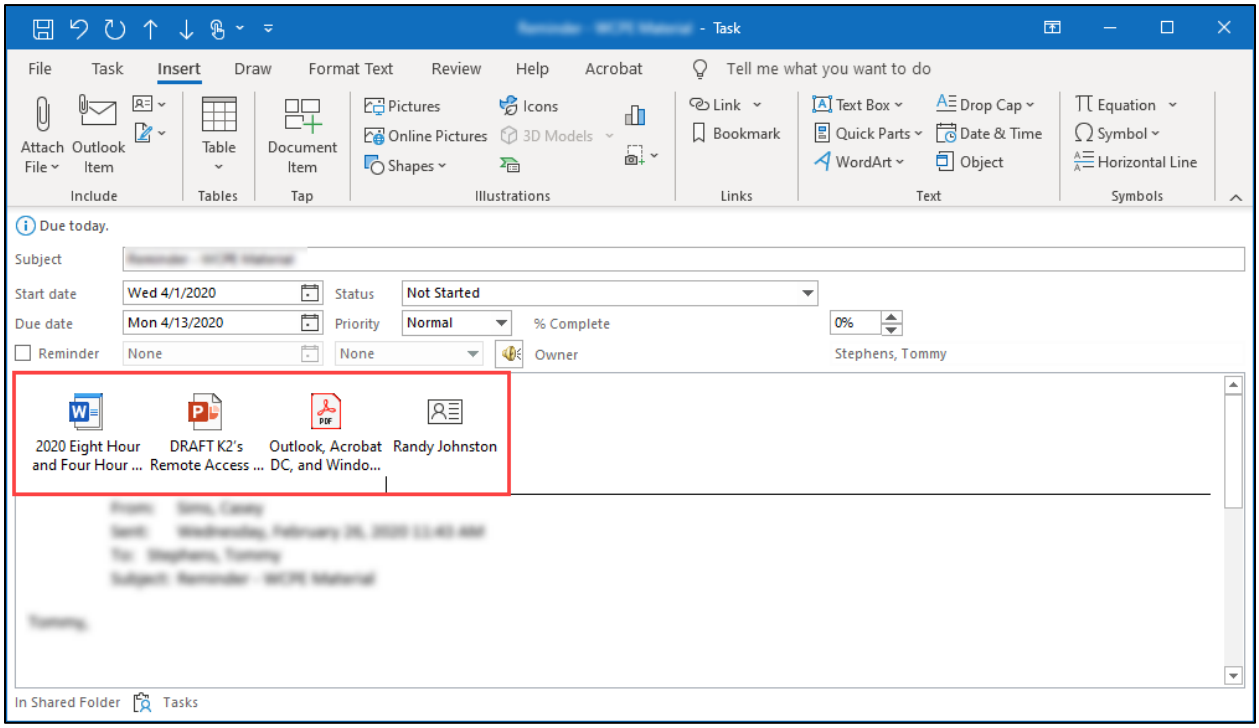


Figure 30 - Build a Complete Record to Support a Task or Appointment

?	Which of the tips presented in this chapter are most likely to change your workflows and how easily will you be able to implement the tips that are most relevant?

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Creating More Effective Presentations With PowerPoint

Chapter 3

Despite its power, in many settings PowerPoint is one of the least effectively used applications. Many users are unaware of some of the features available in PowerPoint that allow them to streamline the process of creating effective presentations. When these features are utilized, they find that the otherwise arduous task of creating a PowerPoint session is often reduced to one that is completed in mere minutes. In this chapter, you will learn how to achieve these results.

Learning Objectives

Upon completing this session, you should be able to:

- Create PowerPoint presentations efficiently from Word documents;
- Integrate PowerPoint and Excel;
- Embed effective animations into PowerPoint slides;
- Use hyperlinks to link Excel data to PowerPoint; and
- Utilize PowerPoint's Zoom feature to control the delivery of a presentation.

Auto-Create a PowerPoint Slideshow from a Word Document

One of the principles of making a good presentation is to make sure that handouts follow the same order as the presentation itself. It is easy to follow this rule when the presentation slideshow is generated directly from the source document. If the source document was formatted with styles, a slideshow can be created automatically from the document. First, add the **Send to Microsoft PowerPoint** command to the **Quick Access Toolbar** (QAT) in Word. Then, open the source document and click the command on the QAT to generate the slideshow as shown in **Figure 31**.

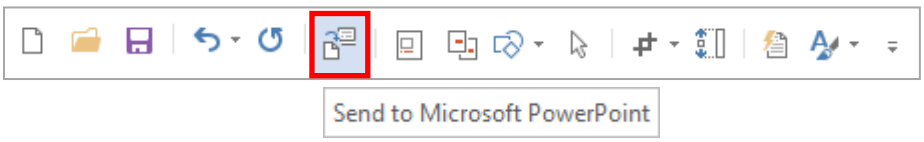


Figure 31 – Creating a Slideshow from a Word Document

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Text formatted with the Heading1 style becomes slide titles. Text formatted with the Heading2 style becomes first-level bullets and with the Heading3 style second-level bullets, etc. Simply add the desired presentation design from the **Design** gallery in PowerPoint, select all slides using **CTRL + A**, and then click **Reset** on the **Home** tab to reformat all of the slides consistent with the selected design. Thus, the process of creating a slideshow manually, which could take hours, can been reduced to a couple of clicks, but only if you use styles in Word!

Pasting Excel Charts into PowerPoint

In situations where charts have already been created in Excel, users can copy and paste these charts into PowerPoint quickly and easily. Whenever an Excel chart is pasted into PowerPoint, the **Paste Options** box appears at the bottom right-hand corner of the pasted chart as shown in **Figure 15**. Select whether to link or to embed the chart and whether to keep the source formatting or to use the destination theme. Note that pasting a chart as a picture is the least desirable option available because a picture is a static image that cannot be edited in any way for presentation. Users will not be able to adjust font sizes or colors or add animation to the chart for more effective presentation.

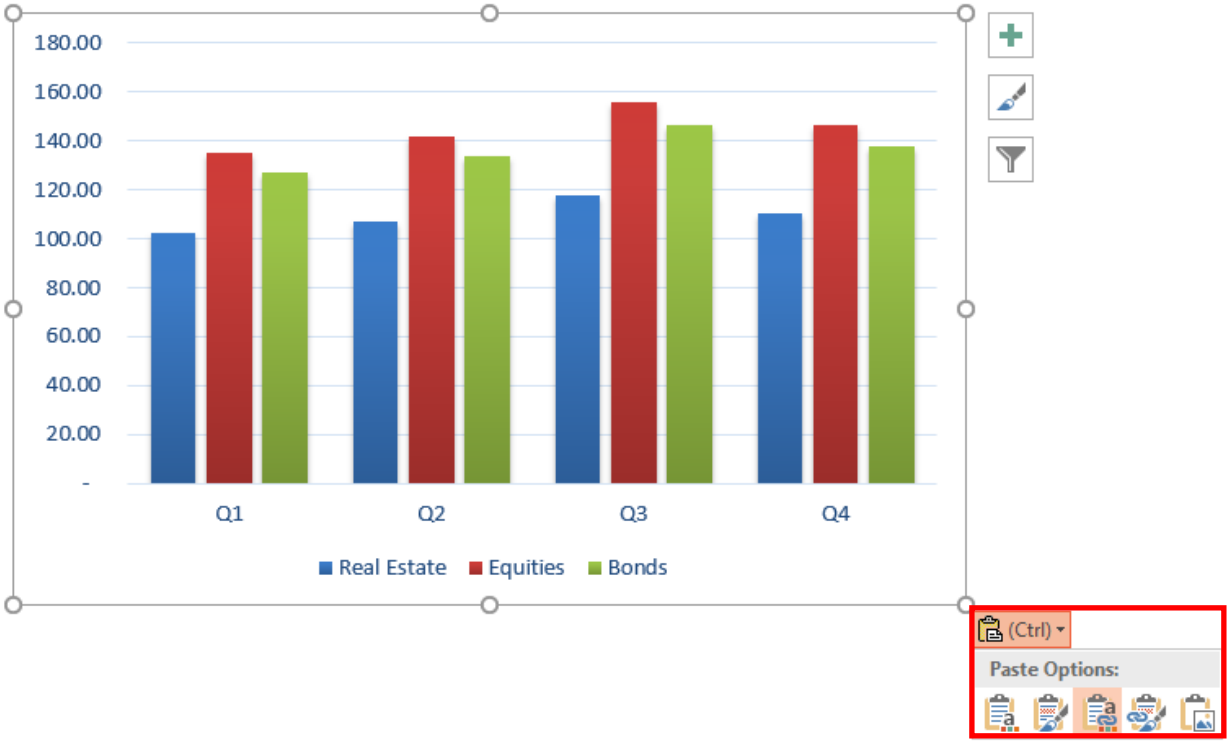


Figure 32 - Pasting an Excel Chart into Word or PowerPoint

Animating Charts in PowerPoint

When displaying a chart during a presentation, the attention of the audience is likely to be focused on the meaning of the chart, while ignoring the explanation being delivered by the

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presenter. PowerPoint allows users to control the animation of the data elements. Instead of displaying the entire chart at once, data elements can be presented in the order desired by the presenter, thereby holding the audience's attention more effectively while the chart is being displayed and explained. Linked and embedded Excel charts can be animated just as charts created in PowerPoint.

To control animation of a chart, add the desired **Entrance** effect to the chart. Then, right-click on the **Entrance** effect and select **Effect Options** followed by the **Chart Animation** tab as shown in **Figure 33**. In the **Group Chart** box, select the desired animation effect. Now when the chart is displayed in a presentation, the data elements will be animated and will appear as specified by the presenter.

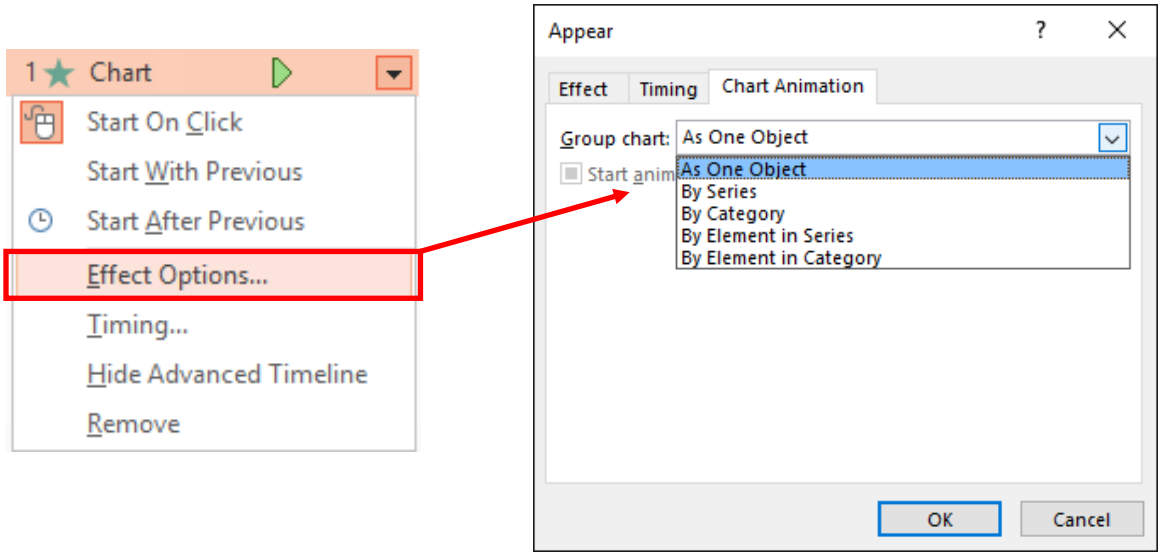


Figure 33 - Adding Animation to a Chart

Using Hyperlinks to Link Excel Data to PowerPoint

Rather than linking or embedding Excel worksheets in PowerPoint slideshows, users can use simple hyperlinks to access detail data during a presentation. To make data access seamless, users should add the Back and Forward buttons to their Quick Access Toolbar (QAT) in Excel, Word, and PowerPoint. Simply click the down arrow at the right end of the QAT and select **More Commands**. From the **All Commands** pane, add Back and Forward as shown in **Figure 34**.

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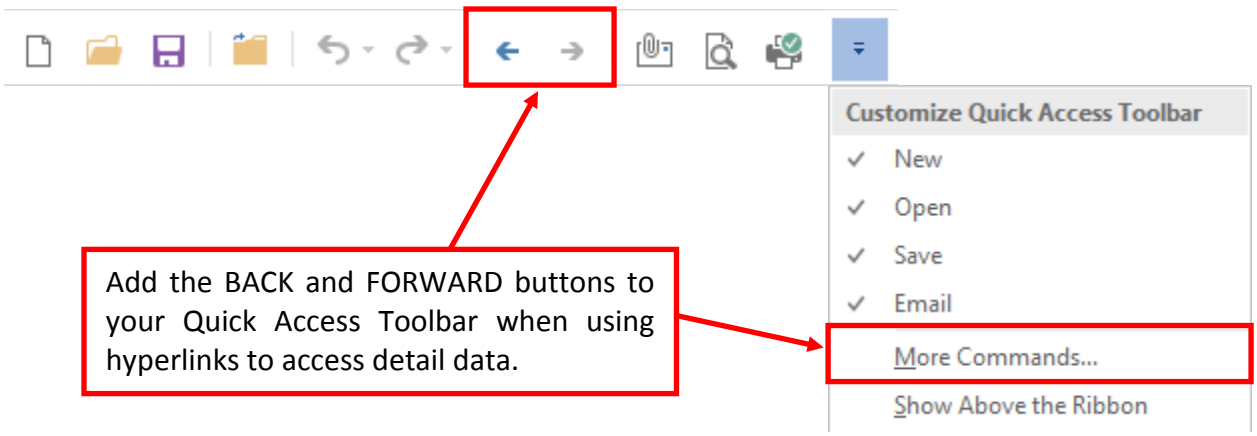
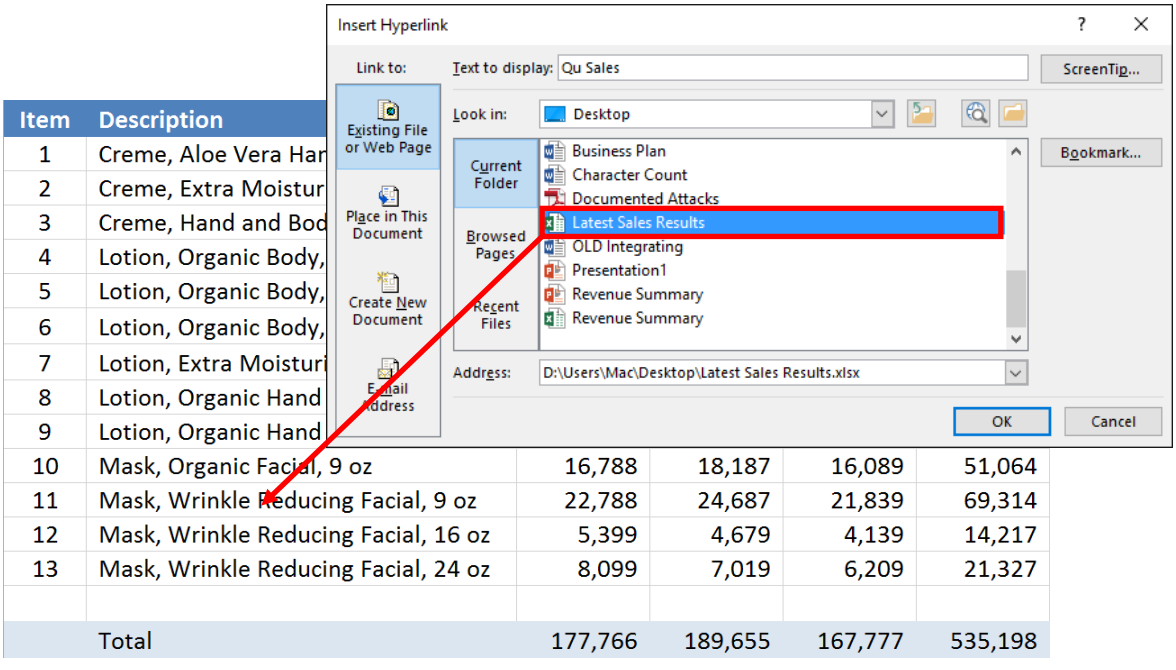


Figure 34 – Add the Back and Forward Buttons to the QAT when Using Hyperlinks

To insert a hyperlink into a PowerPoint slideshow, highlight the text or object that will serve as the link and then select **Insert, Hyperlink** from the ribbon. Click **Existing File or Web Page** in the navigation pane on the left and then select the appropriate file and click **OK** as shown in **Figure 35**. Before the presentation, make sure to rearrange the worksheet and the worksheet zoom so that the data displays as desired during the presentation.



Item	Description				
1	Creme, Aloe Vera Har				
2	Creme, Extra Moistur				
3	Creme, Hand and Bod				
4	Lotion, Organic Body,				
5	Lotion, Organic Body,				
6	Lotion, Organic Body,				
7	Lotion, Extra Moisturi				
8	Lotion, Organic Hand				
9	Lotion, Organic Hand				
10	Mask, Organic Facial, 9 oz	16,788	18,187	16,089	51,064
11	Mask, Wrinkle Reducing Facial, 9 oz	22,788	24,687	21,839	69,314
12	Mask, Wrinkle Reducing Facial, 16 oz	5,399	4,679	4,139	14,217
13	Mask, Wrinkle Reducing Facial, 24 oz	8,099	7,019	6,209	21,327
	Total	177,766	189,655	167,777	535,198

Figure 35 – Using Hyperlinks to Access Detail Excel Data from within PowerPoint

Using PowerPoint's Animation Painter

Many Microsoft Office users are acutely aware of the Format Painter feature available in most Office applications. Like the Format Painter, PowerPoint's **Animation Painter** makes it easy for

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you to copy a set of animations from one slide to another. To use the Animation Painter, simply perform the following steps.

1. After applying animations to a text box, select the text box with your mouse.
2. From the **Animations** tab of the Ribbon, click **Animation Painter**.
3. With your mouse, select the text box to which you wish to apply the animation.
4. Click **Animation Painter** to paste the animation to the selected text box.

If you want to paste the animation to multiple text boxes, modify the process outlined above by double-clicking on **Animation Painter** in the second step. Then, after you have applied the animation to all desired text boxes, click on **Animation Painter** to disable it.

Using PowerPoint's Zoom Feature

PowerPoint's Zoom feature is a relatively new tool that you can take advantage of to control the delivery of your content in a presentation. When you choose to implement Zoom, it recognizes the presence of **sections** in your presentation and, essentially, groups the slides in each section into a "chapter." Once this is done, Zoom creates thumbnails of the first slide of each section and embeds hyperlinks into the thumbnails. Zoom then groups all the thumbnails onto the same slide. To deliver your presentation in this environment, you simply access the slide that contains the thumbnail images, an example of which is presented in **Figure 36**.

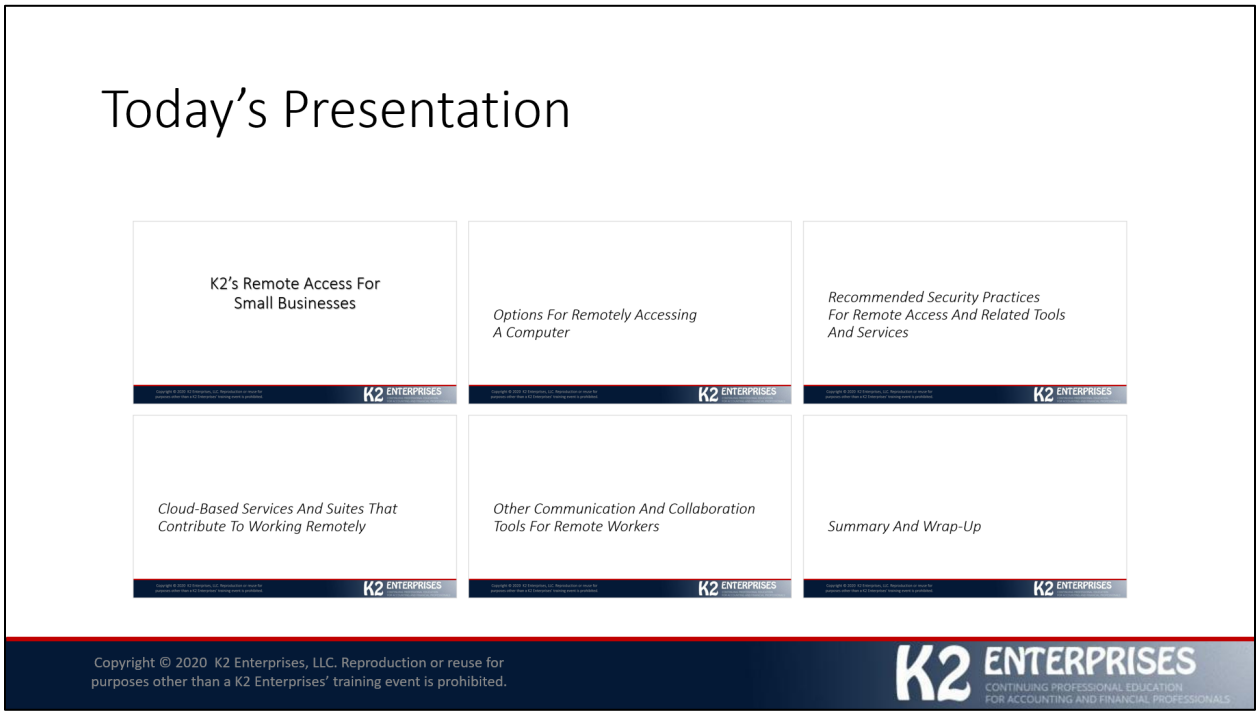


Figure 36 – Summary Slide Created by PowerPoint's Zoom Feature

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With the summary slide created, click on the thumbnail that represents the section you want to deliver at that time. PowerPoint then begins to show the slides from that section. Upon completing the last slide for a section, PowerPoint returns to the slide that contains all the thumbnails. From there, you can select the next grouping of slides you would like to present. Obviously, the purpose of Zoom is to provide flexibility and control over the order of a presentation. For example, maybe you were allotted an hour for your presentation and created your slide deck accordingly. However, others presenting before you ran over their allotted time and now you only have 30 minutes to deliver your presentation. With PowerPoint's Zoom feature, you will be able to pick-and-choose the sections you want to present – the most important ones – seamlessly, without having to rapidly click through the other sections.

You will find PowerPoint's Zoom feature on the **Insert** tab of the Ribbon. Note that when you access Zoom, you can create a **Summary Zoom** for all sections, a **Section Zoom** which gives you more granular control, and a **Slide Zoom** which is simply a link to a specific slide in the presentation.

?	How might you use PowerPoint feature such as Zoom and animated charts to create for effective and compelling PowerPoint presentations?

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