Grow Your Microsoft Skills:
Tips and Tricks for Outlook, Word and Excel

Option 1 Credit Union
President's Day 2009
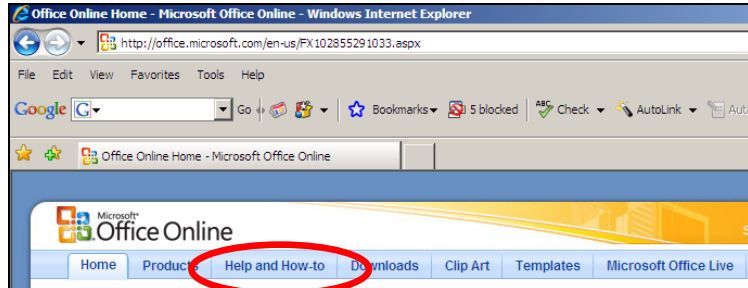
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General Computer Tips

Online Microsoft Help	Microsoft has help available online. To access their online help tutorials, visit http://office.microsoft.com, and click on the "Help and How To" tab.
Control+Alt+Delete	*Control + Alt + Delete* has many handy functions. Simultaneously hit all three of these buttons for the following options: • **Lock Computer** – Use this function if you are briefly walking away from your PC. It will lock your computer so that no one else can use the PC in your absence. • **Log Off** – Use this function if you want to log off the computer so that others may log on and use it. • **Shut Down** – This function will shut down your computer. • **Change Password** – Use this function to change your network password. • **Task Manager** – Use this function to close an application that is not responding. • **Cancel** – If you decide not to perform any of the functions listed above, click on this button to return to the application you were previously using.
Alt+Tab	*Alt + Tab*: While holding down *Alt*, repeatedly hit *Tab* in order to toggle between the various open applications on your PC.
Open Documents of any Format	Not sure what format a document is saved as (Word, Excel, etc.)? It doesn't matter when you use **My Computer** or **Explorer** to open documents.

Microsoft Outlook Tips and Tricks

Create new items from existing items	You can drag an item into a folder of items of another type or on top of another type folder button in the **Navigation Pane** to quickly create a new item of a different type. For example, to create an appointment from an e-mail message, drag the message to the **Calendar** button in the **Navigation Pane**. Relevant information from the message is added to fields in the new appointment, and the entire message appears in the appointment body. Or, you can drag only selected text from an item to create a new item. This feature, AutoCreate, works only with items of different types, such as a message and an appointment. If you drag, copy, or move an item into a folder that contains items of the same type, the item is copied or moved. If you drag a meeting request or task request from your **Inbox** to **Calendar** or **Tasks**, the request is automatically accepted and an acceptance reply is sent to the sender.
Flag emails for follow up or other action	In the message or contact, click **Follow Up** . In the **Flag to** list, select the text you want, or type your own. In the **Flag color** list, select the color flag you want. (Note: The **Flag color** option is not available for contacts.) Enter a date and time in the **Due by** boxes.
Create folders to organize email messages	On the **File** menu, point to **New**, and then click **Folder**. In the **Name** box, enter a name for the folder. In the **Folder contains** box, click the type of folder you want to create. In the **Select where to place the folder** list, click the location for the folder. Drag and drop messages into the appropriate folders for quick and easy reference in the future. (Note: For even faster message organization, create rules to automatically move certain incoming messages to specific folders.)

Use rules and alerts to prioritize and save time	In **Mail**, from the **Tools** menu, click **Rules and Alerts**. Click **New Rule**. Do one of the following: • Use a template with pre-specified actions and conditions. Select the template you want. • Create the rule by specifying your own conditions, actions, and exceptions. [Note: This option is not available when you create a rule (rule: One or more automatic actions taken on e-mail messages and meeting requests that meet certain conditions, along with any exceptions to those conditions; rules are also referred to as filters) for a public folder.] Click **Start from a blank rule**, and then click **Next**. Under **Select when messages should be checked**, select **Check messages when they arrive** or **Check messages after sending**, and then click **Next**. Follow the rest of the instructions in the Rules Wizard. If you want to run this rule on messages already in one of your folders, select the **Run this rule now on messages already in "***folder***"** check box on the last page of the Rules Wizard.
Delay the delivery of an email	In the message, click **Options**. Under **Delivery options**, select the **Do not deliver before** check box, and then click the delivery date and time you want.
Add voting buttons to an email	In the message, click **Options**. Select the **Use voting buttons** check box, and then click the voting button names you want to use in the box. (Note: To create your own voting button names, delete the default button names, and then type any text you want. Separate the button names with semicolons.) Under **Delivery options**, select the **Save sent message to** check box. To select a folder other than the **Sent Items** folder, click **Browse**. Click **Close**, and then click **Send**.

Create an email signature	From the main Microsoft Outlook window, on the **Tools** menu, click **Options**, and then click the **Mail Format** tab. In the **Compose in this message format** list, click the message format that you want to use the signature with. Under **Signature**, click **Signatures**, and then click **New**. In the **Enter a name for your new signature** box, enter a name. Under **Choose how to create your signature**, select the option you want. Click **Next**. In the **Signature text** box, type the text you want to include in the signature. You can also paste text to this box from another document. To change the paragraph or font format, select the text, click **Font** or **Paragraph**, and then select the options you want. These options are not available if you use plain text as your message format. Click **Finish** when you are done editing the new signature
Use the out of office assistant	In **Mail**, on the **Tools** menu, click **Out of Office Assistant**. Click **I am currently Out of the Office.** In the **AutoReply only once to each sender with the following text** box, type the message that you want to send to others while you are out. (Note: If you want, create rules to manage your incoming mail.)
Add words to the custom spelling dictionary	Use the following procedures to add words to the dictionary,Custom.dic, which is shared by all Microsoft Office programs. From the **Tools** menu, click **Options**, and then click the **Spelling** tab. Click **Edit**. Type the words in the list. Press ENTER after each word. On the File menu in Notepad, click **Save**.

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Retrieve deleted items	**Retrieve an item or folder from the Deleted Items folder** In **Mail** or **Folder List**, and then in the **Navigation Pane**, click **Deleted Items**. Select the items you want to retrieve. Drag the item(s) from the **Deleted Items** folder to another folder. **Recover deleted items or folders that were permanently deleted** In **Mail** or **Folder List**, click on **Deleted Items**. On the **Tools** menu, click **Recover Deleted Items**. In the list, click the item or folder you want to retrieve, and then click the **Recover Selected Items** icon . The item is recovered and saved in the **Deleted Items** folder. Note: Some items may not be recoverable. The length of time that deleted items are stored on the server is set by your administrator.
Contacts: Display map of address	In **Contacts**, open the contact. In the **Addresses** section, click the down arrow, and then click the type of address you want to find on a map—**Business**, **Home**, or **Other**. On the **Actions** menu, click **Display Map of Address**.
Contacts: Keep track of your contact activity	In **Contacts**, open the contact that you want to view the related items for. Click the **Activities** tab. In the **Show** list, click the type of item you want to see.
Forward contacts to others	You can forward one or several of your contacts as an attachment in an e-mail message to another person. In **Contacts**, click the contact that you want to forward. (Note: To select multiple contacts, press CTRL while clicking the contacts.) Right-click the contact, and then click **Forward**.
Add holidays to the calendar	In **Calendar**, on the **Tools** menu, click **Options**, click **Calendar Options**, and then click **Add Holidays**.

Microsoft Excel Tips and Tricks

Creating formulas	**Add, divide, multiply, and subtract** Type an equal sign (=), use math operators, and then press ENTER. • =10+5 to add • =10-5 to subtract • =10*5 to multiply • =10/5 to divide Formulas are visible in the formula bar when you select a cell that contains a result. Note: If the formula bar is not visible, on the **Tools** menu, click **Options**. Click the **View** tab, and select **Formula bar** check box. **Use cell references in formulas** Entering cell references lets Microsoft® Excel automatically update formula results if cell values are changed. For example: • Type=**C4+C7** in a cell. • Or type the equal sign (=), click cell C4, then type the plus sign (+), and finally click cell C7.

Cell references	Refers to values in
A10	the cell in column A and row 10
A10,A20	cell A10 and cell A20
A10:A20	the range of cells in column A and rows 10 through 20
B15:E15	the range of cells in row 15 and columns B through E
A10:E20	the range of cells in columns A through E and rows 10 through 20

Note: If results are not updated, on the **Tools** menu click **Options**. Click the **Calculation** tab and select the **Automatic** check box.

Creating formulas continued...	**Add the values in a row or column**

Use the SUM function, which is a prewritten formula, to add all the values in a row or column:

1. Click a cell below the column of values or to the right of the row of values.

2. Click the **AutoSum** button $\boxed{\Sigma}$ on the **Standard** toolbar, and then press ENTER.

To add some of the values in a column or row:

1. Type an equal sign, type **SUM**, then type an opening parenthesis.

2. Type or select the cell references you want to add. A comma (,) separates individual arguments that tell the function what to calculate.

3. Type a closing parenthesis, and then press ENTER.

For example: =SUM(B2:B4,B6) and =SUM(B2,B5,B7)

Find the average, maximum, or minimum

Use the AVERAGE, MAX, or MIN functions.

1. Click a cell below or to the right of values for which you want to find the average (arithmetic mean), the maximum, or the minimum.

2. Click the arrow next to **AutoSum** $\boxed{\Sigma \enspace \cdot}$ on the **Standard** toolbar. Click **Average**, **Max**, or **Min**, and then press ENTER.

To see more functions, click **More Functions** on the **AutoSum** list to open the **Insert Function** dialog box.

Tip: You can also enter formulas and cell references by typing them in the formula bar $\boxed{f_x \qquad}$ after selecting a cell.

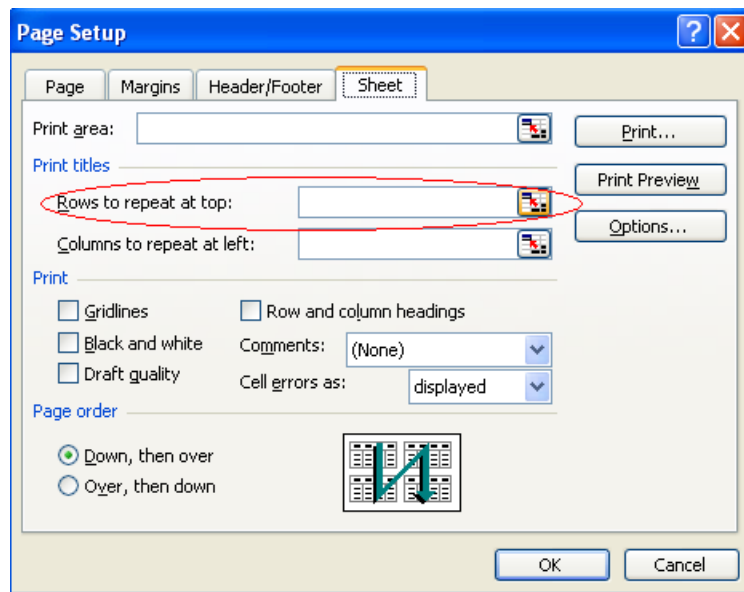|	

Creating formulas continued...	**Use more than one math operator in a formula**
	
	If a formula has more than one operator, Excel follows the rules of operator precedence instead of just calculating from left to right. Multiplication is done before addition: =11.97+3.99*2 is 19.95. Excel multiplies 3.99 by 2, and then adds the result to 11.97.
	
	Operations inside parentheses take place first: =(11.97+3.99)*2 is 31.92. Excel adds first and then multiplies the result by 2.
	
	Excel does use operators from left to right if they have the same level of precedence. Multiplication and division are on the same level. Lower than multiplication and division, addition and subtraction are on the same level.
	
	Select the format for values to use in calculations
	
	To format cells to display two decimal place numbers, click **Cells** on the **Format** menu, click the **Number** tab, select the **Number** category, and select **2** in the **Decimal places** box.
	
	Understand error values
	
	    • ##### - The column is not wide enough to display the content. Increase column width, shrink contents to fit the column, or apply a different number format.
	
	    • **#REF!** - A cell reference is not valid. Cells may have been deleted or pasted over.
	
	    • **#NAME?** - You may have misspelled a function name.
	
	Cells with errors such as #NAME? may display a color triangle. If you click the cell, an error button appears to give you some error correction options.
	
	Print formulas
	
	    1. Display formulas on the worksheet. On the **Tools** menu, point to **Formula Auditing**, and then click **Formula Auditing Mode**.
	
	    2. On the **File** menu, click **Print**.
	
	    3. Hide formulas on worksheets by repeating step 1.
	
	Tip: You can also press CTRL+` (next to the 1 key) to display or hide formulas.

Doing on-the-fly calculations	You can get a quick calculation by simply selecting a data range and glancing at the SUM formula results in the status bar at the bottom of your Excel window. In addition to a swift SUM calculation, you can choose to display a different calculation in the status bar. Simply right-click on the SUM formula and then choose a different function from the resulting dropdown list. You can choose AVERAGE, MIN, MAX and more.
Repeat header row on each page	Go to **File**, then **Page Setup**, then **Sheet**. Click on to repeat rows (see below). A new Window will appear. Click on Row 1 to copy the header row. The window will now be populated with the row location to repeat (see below). Click to complete, then click OK. To Preview the page with the headers, click .

Freeze or lock rows and columns	Keep titles in sight as you scroll through worksheets. To freeze titles, make a selection in the worksheet, and then click **Freeze Panes** on the **Windows** menu. To freeze titles, *do not* select the titles themselves. To freeze: • **Column titles only** Select the first **row** below the titles. • **Row titles only** Select the first **column** to the right. • **Both column and row titles** Select the **cell** that is both directly below the column titles and to the right of the row titles. To unfreeze panes, on the **Window** menu, click **Unfreeze Panes**. Tips: You can freeze panes anywhere, not just below the first row or to the right of the first column. Click the row below, or the column to the right, or the cell that is both below and just to the right of whatever information you want to freeze.
Create hyperlinks within a workbook	Excel workbooks can store a huge amount of data, and getting from one place to another in a file can be tedious. You can simplify things by creating hyperlinks that jump exactly to a specific place in the file. To insert a hyperlink to a specific location in your workbook: 1. Select the cell you want to contain a hyperlink. 2. Enter the text that you want the hyperlink to display. 3. Choose Insert | Hyperlink from the menu bar to open the Insert Hyperlink dialog box. 4. Select the Place In This Document button on the Link To bar on the left side of the dialog box. If your workbook contains named ranges, you can select a name from the Defined Names list and the hyperlink will jump to it when you click it. Otherwise, select the appropriate worksheet name under the Cell Reference node and enter a cell or range address in the Type The Cell References text box.

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Compare worksheets side by side	Open the two excel documents that you wish to compare side by side. From the **Windows** menu, click the **Compare Side by Side with…** command.
	To change sheets in both workbooks, you must click the sheet tabs in both workbooks. Clicking in one will not change the sheets in the other.
	You can see data up close by zooming in on both worksheets at the same time. Just click **Zoom** on the **View** menu. (Or if you have a scrolling mouse, hold down the control button and spin the scrolling wheel on your mouse.)
	You can change the side by side orientation from horizontal to vertical by clicking **Arrange** on the **Window** menu, and then selecting **Vertical**. Be sure that you only have two workbooks open when you do this. If you have more than two, they'll all open up next to each other.
	You only have to change orientation once. Excel will remember how you arrange your windows to compare them side by side. Clicking the **Reset Window Position** button on the **Compare Side by Side** toolbar will return the orientation to one on top of the other.
	If workbooks are differently sized or positioned—for example, if one is larger or smaller than the other—clicking the **Reset Window Position** button on the **Compare Side by Side** toolbar will return both workbooks to equal sizes and positions. Keep in mind, however, that this will also return orientation to one on top of the other if you previously set the orientation to one next to the other.
	To close the side by side view, simply click the **Close Side by Side** button on the **Compare Side by Side** toolbar.

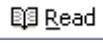|	
Set file default locations	Set a default file location so you don't have to navigate as much when saving a document – like a default location to my H drive folder. Go to **Tools**, then **Options**, then **General**. In the **Default file location** field, enter the desired default location. Click OK.
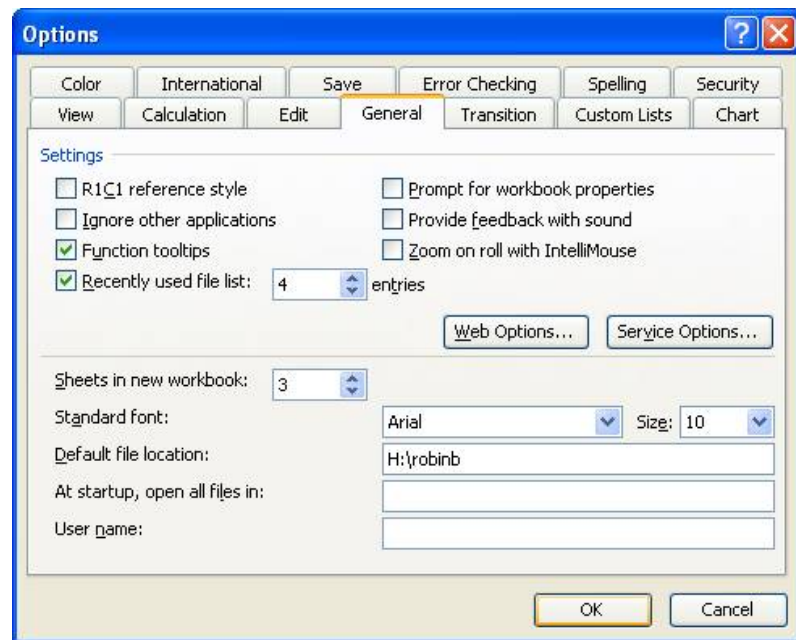
Microsoft Word Tips and Tricks

| *Explore the cool features of the Reading Layout View* | To switch on reading layout view:

Click the **Read** button 📖 Read on the **Standard** toolbar.
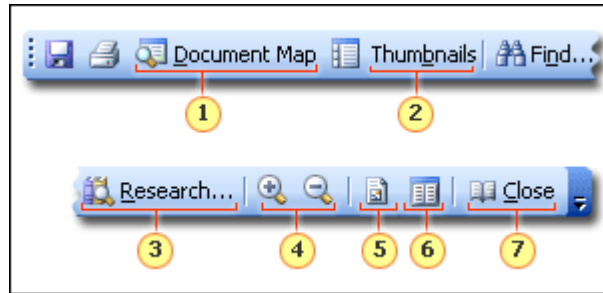
The **Reading Layout** toolbar:

① **Document Map**: Displays the document map in a panel on the left side of the window.

② **Thumbnails**: Displays several pages of the document in a thumbnail format at the left side of the window.

③ **Research**: Opens the **Research** task pane at the right side of the window.

④ **Text Size**: These two buttons give you the ability to make the text larger (or smaller) for reading purposes without changing the font size.

⑤ **Actual Page**: See what the text would look like on a page if you printed it. This is similar to print layout view.

⑥ **Allow Multiple Pages**: Look at two pages side by side, as you do when you read a book.

⑦ **Close**: Closes reading layout view.

To switch off documents opening in reading layout view:

On the **Tools** menu, click **Options**, and then on the **General** tab, clear the **Allow starting in Reading Layout** check box. |

Create tables	Click where you want to create a table. Click **Insert Table** on the **Standard** toolbar. Drag to select the number of rows and columns you want. You can quickly give your table a professional design by using any of the built-in table formats. Click the table. On the **Table** menu, click **Table AutoFormat**. In the **Table styles** box, click the format you want. Select the options you want. Click **Apply**. To add/delete a cell, row, or column to the table, go to the **Table** menu, point to **Insert** or **Delete**, and then click the appropriate option. To adjust column width or height, drag the right border of the column, or drag the bottom border of the row. Right-click the border to AutoFit the column or row according to its contents.
Discover and use Mail Merge	1. **Select the document type:** From the **Tools** menu, select **Letters and Mailings**. Then, select **Mail Merge Wizard**. Select the type of main document you want to use, and click Next. 2. **Select the starting document**: Specify how you want to set up your letters and click Next. 3. **Select recipients:** Specify the list of recipients you want to use (and enter the recipients if necessary) and click Next. 4. **Write your letter:** Place the insertion point where you want to insert the mail merge data within the Main Document, and click the appropriate items in the mail merge task pane. Click Next when finished. 5. **Preview your letters:** Browse the merged letters and click Exclude to exclude a letter. Click Next when finished. 6. **Complete the merge:** Specify which printer you want to send the merged letters to.
Find and Replace	You can automatically replace text — for example, you can replace "PLS" with "Save to Win". On the **Edit** menu, click **Replace**. In the **Find what** box, enter the text that you want to search for. In the **Replace with** box, enter the replacement text. Select any other options that you want. Click **Find Next**, **Replace**, or **Replace All**. To cancel a search in progress, press ESC.

Headers and Footers	**To Create the same header or footer for each page** On the **View** menu, click **Header and Footer** to open the header or footer area on a page. To create a header, enter text or graphics in the header area. To create a footer, click **Switch Between Header and Footer** on the **Header and Footer** toolbar to move to the footer area, and then enter text or graphics. If necessary, format text by using buttons on the **Formatting** toolbar. When you finish, click **Close** on the **Header and Footer** toolbar. **Create a different first page header or footer** You can leave the header or footer off the first page or create a unique first page header or footer for the first page in a document or the first page of each section within a document. On the **View** menu, click **Header and Footer**. On the **Header and Footer** toolbar, click **Page Setup** . Click the **Layout** tab. Select the **Different first page** check box, and then click **OK**. If necessary, click **Show Previous** or **Show Next** on the **Header and Footer** toolbar to move into the **First Page Header** area or **First Page Footer** area. Create the header or footer for the first page of the document or section. If you don't want a header or footer on the first page, leave the header and footer areas blank. To move to the header or footer for the rest of the document or section, click **Show Next** on the **Header and Footer** toolbar. Then create the header or footer you want. **Create different headers or footers for odd and even pages** On the **View** menu, click **Header and Footer**. On the **Header and Footer** toolbar, click **Page Setup** . Click the **Layout** tab. Select the **Different odd and even** check box, and then click **OK**. If necessary, click **Show Previous** or **Show Next** on the **Header and Footer** toolbar to move into the odd or even header or footer areas. Create the header or footer for odd-numbered pages in the **Odd Page Header** or **Odd Page Footer** area and create the header or footer for even-numbered pages in the **Even Page Header** or **Even Page Footer** area.

Set file default locations	Set a default file location so you don't have to navigate as much when saving a document – like a default location to my H drive folder. Go to **Tools**, then **Options**, then **File Locations**. Select documents from the list and click Modify. Select the desired location and click OK.