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FILE TRIAGE MKII

*Working Smarter, Not Harder in Microsoft
Word, Excel, and PowerPoint*



KNACK TRAINING

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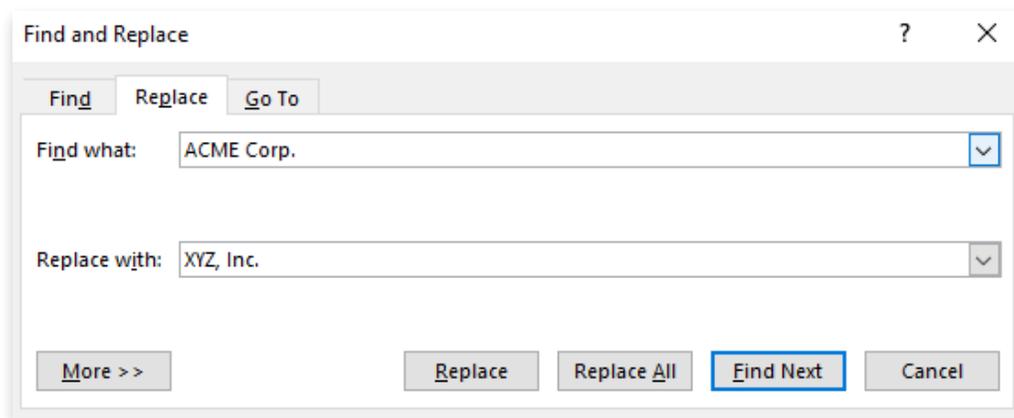
MICROSOFT WORD

In Microsoft Word, the most common problem is ‘on the fly’ formatting. If you and your team haven’t planned ahead, we can replace poor formatting with Styles. In addition, building replacement tools for content can revamp a document very quickly.

FIND AND REPLACE

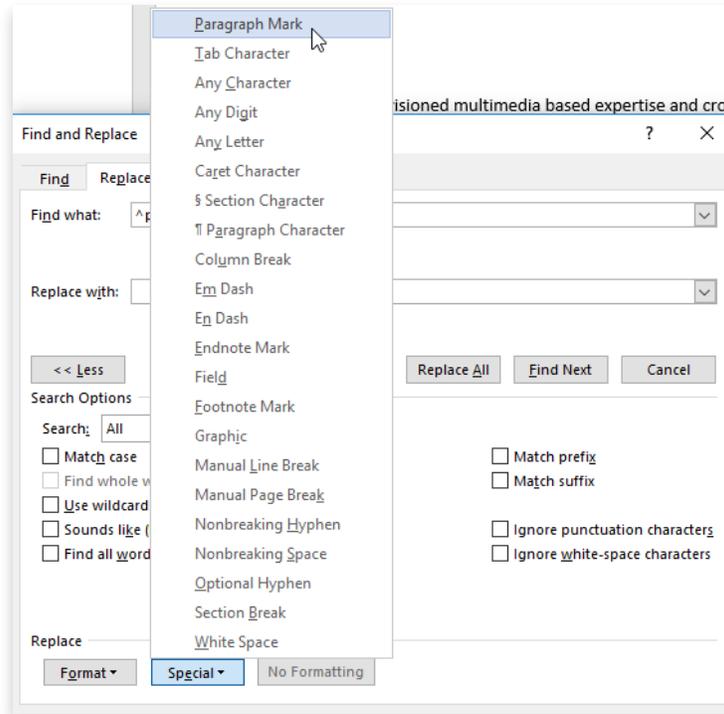
GENERAL CONTENT

The most common use of Find and Replace is to replace words or phrases. If your company changes name, for example, you can use the keyboard shortcut **[CTRL] + [H]** to open the dialog box:



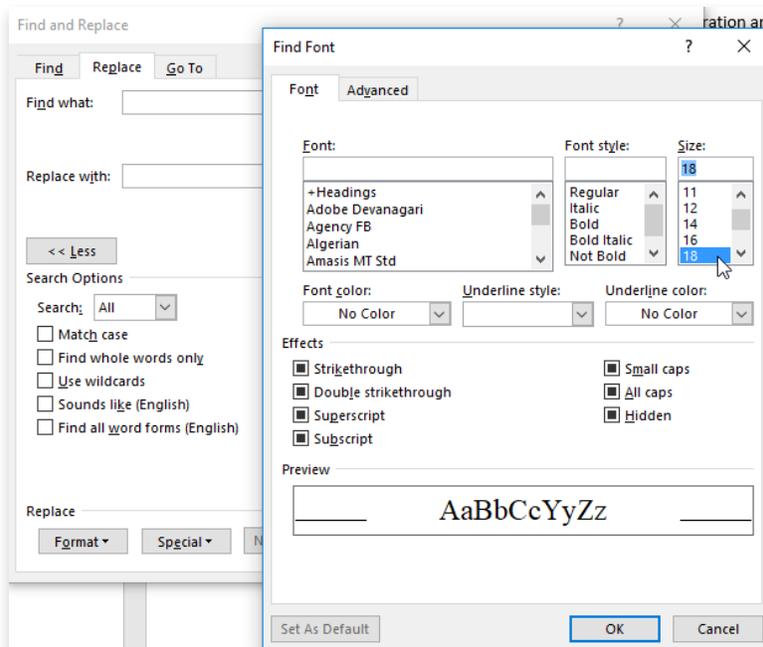
SPECIAL CHARACTERS

Interestingly, if you use **[CTRL] + [H]** and press **More >>**, you'll find a number of other options. For example, you can use **Special** to replace a double return with a single return:



FORMATTING

Additionally, you can use **Formatting** to replace **18pt** font with **Heading 2**:



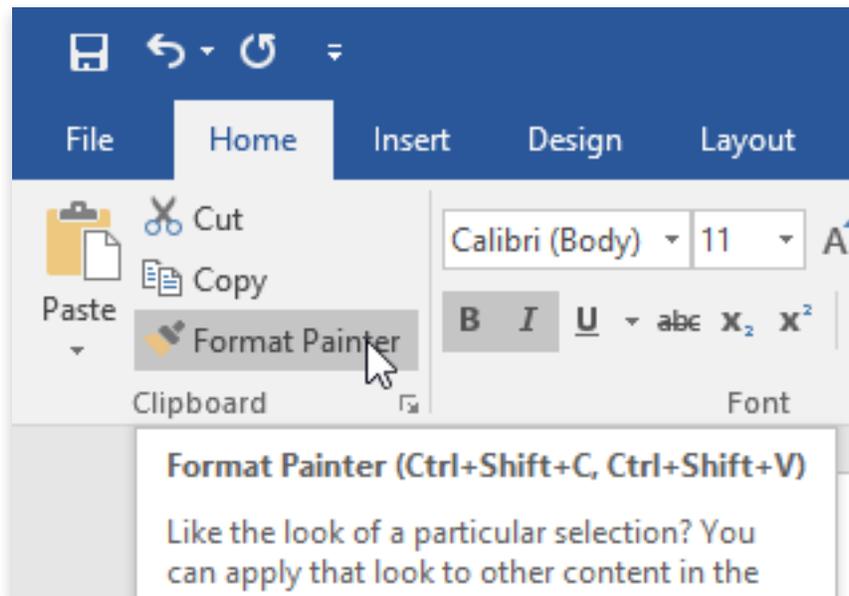
FORMATTING

FORMAT PAINTING

Any formatting you'd like to copy to a new piece of content, simply select the content that's already formatted:

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries. **Themes and styles also help keep your document coordinated.** When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign. Reading is easier, too, in the new

Then, to use it *once*, **single click** the **Format Painter** on the **Home Ribbon**:

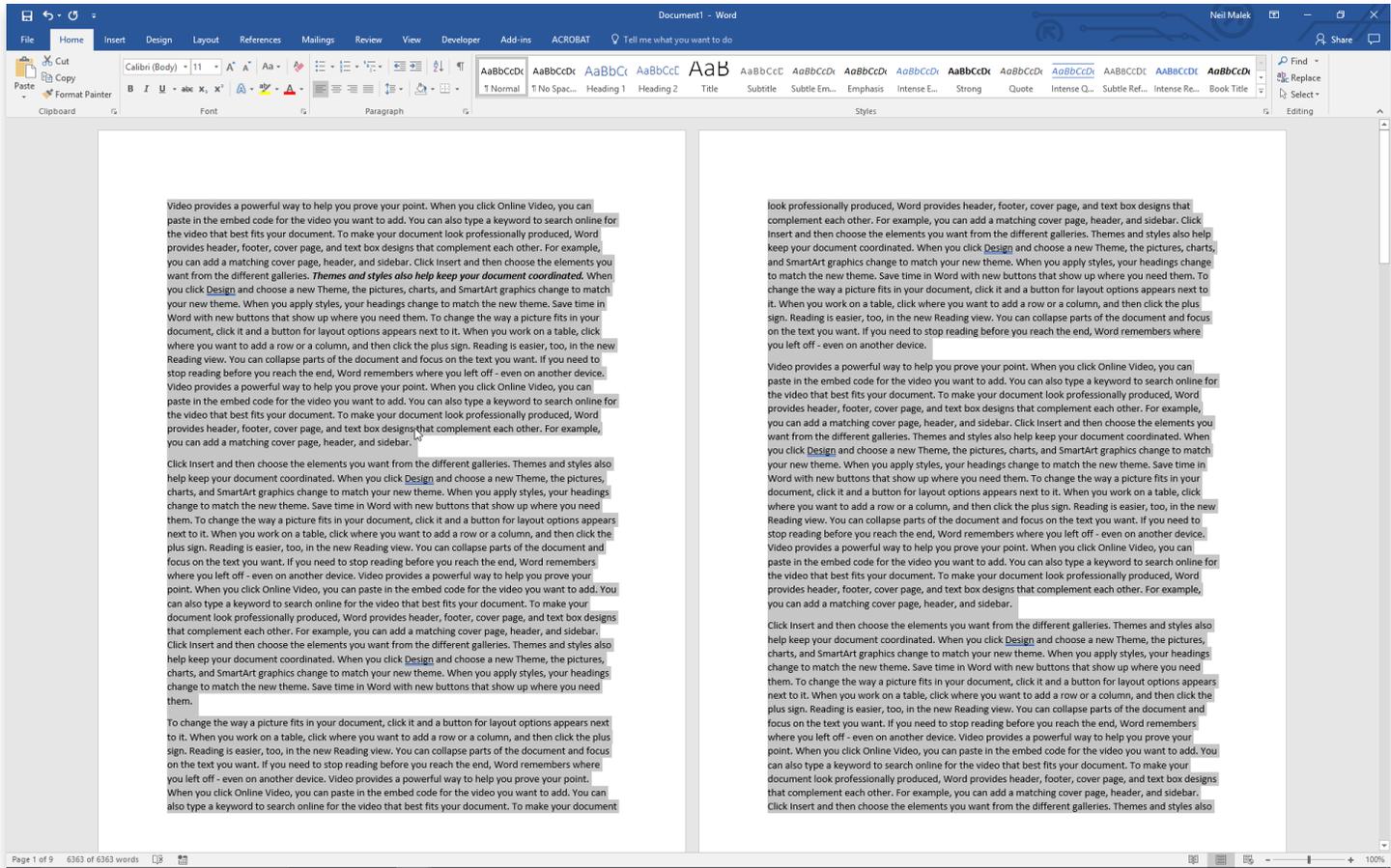


..or, to use it multiple times in a row, **double-click** the **Format Painter**. Press **[ESC]** on the keyboard to stop format painting.

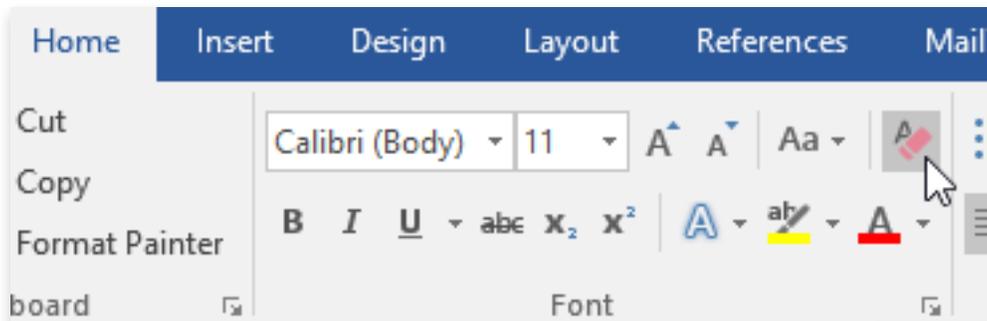
Also, remember the keyboard shortcuts for copying and pasting formatting: **[CTRL] + [SHIFT] + [C]** to copy, followed by **[CTRL] + [SHIFT] + [V]** to paste.

CLEAR FORMATTING

To remove unique formatting from a section of your content, first select that content (**[CTRL] + [A]** to select all the content in the document):

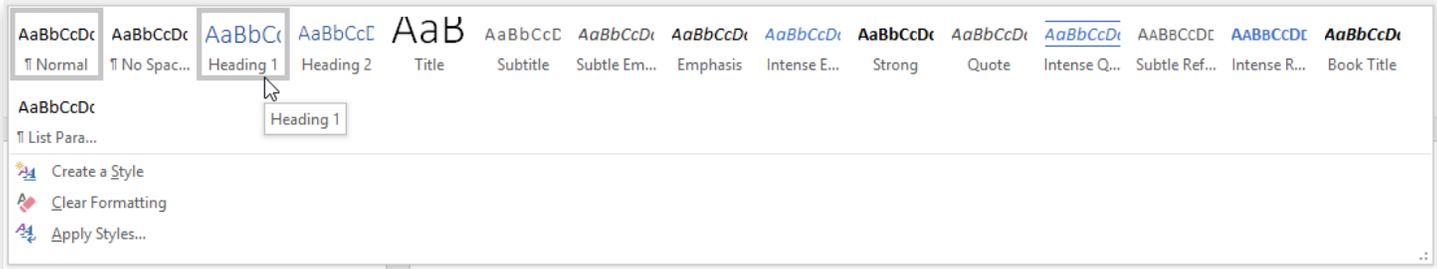


Next, click the **Clear Formatting** button on the **Home Ribbon**:



APPLYING STYLES

To use any of the standard styles, select the content to be formatted, then either use the **Styles Pane** on the **Home Ribbon**:



..or use the keyboard shortcuts:

[CTRL] + [SHIFT] + [N] Normal Style

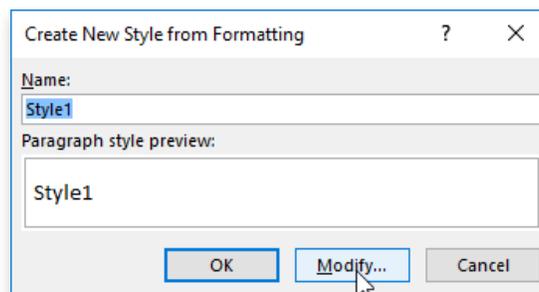
[CTRL] + [ALT] + [#] Heading # (1 for Heading 1, etc.)

NEW STYLES

If there's a bit of formatted text that you like, and you'd like to apply it many times throughout your document, select the content, then click the **drop-down arrow** on the **Styles Pane** on the **Home Ribbon**:



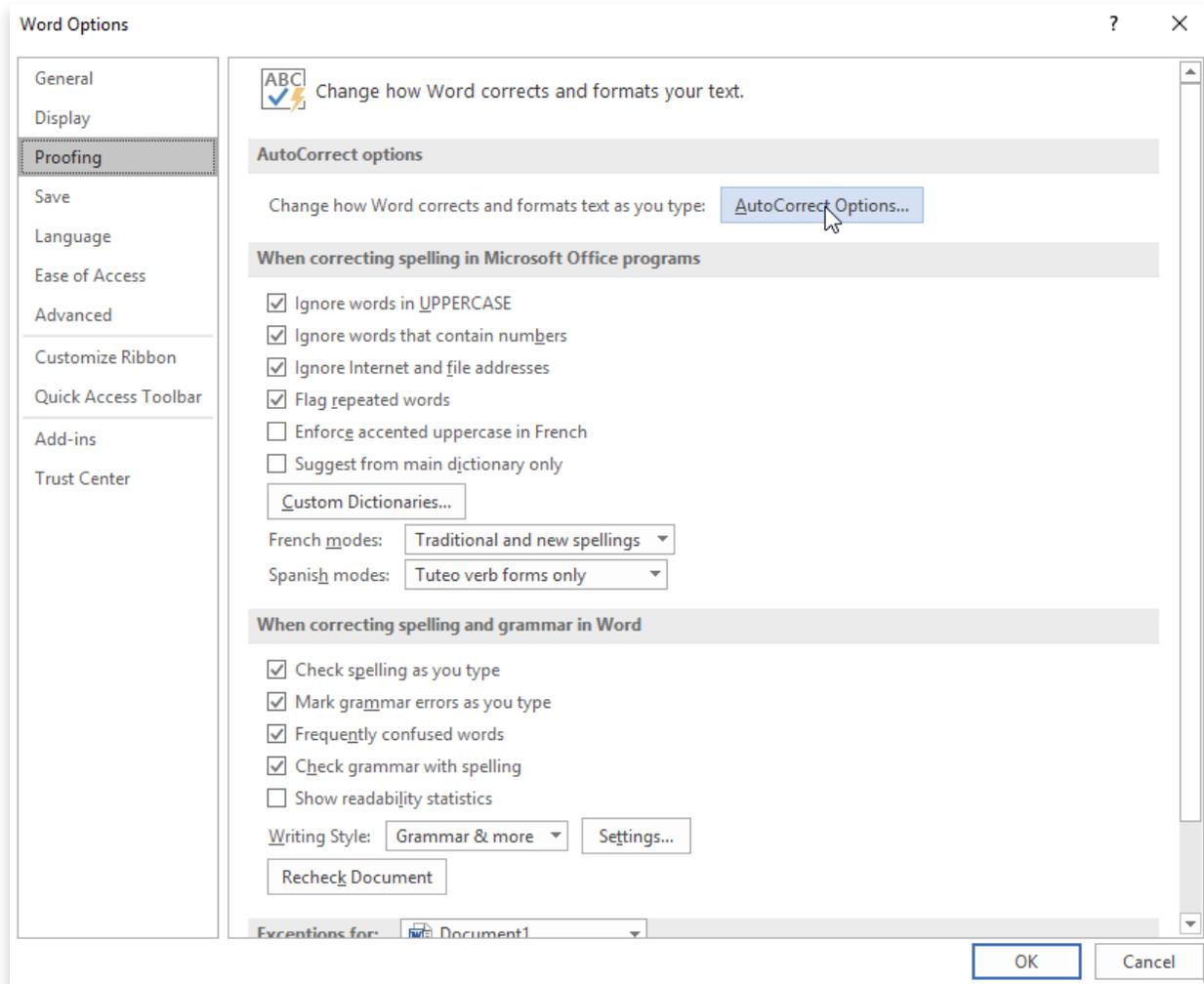
Then, click **Create a Style**. Finally, **Name** and **Modify** your style as necessary.



TEMPLATES

AUTOREPLACE TOOLS

To adjust what Microsoft Word will automatically replace or adjust, click **File Tab > Options > Proofing > AutoCorrect Options:**



QUICK PARTS

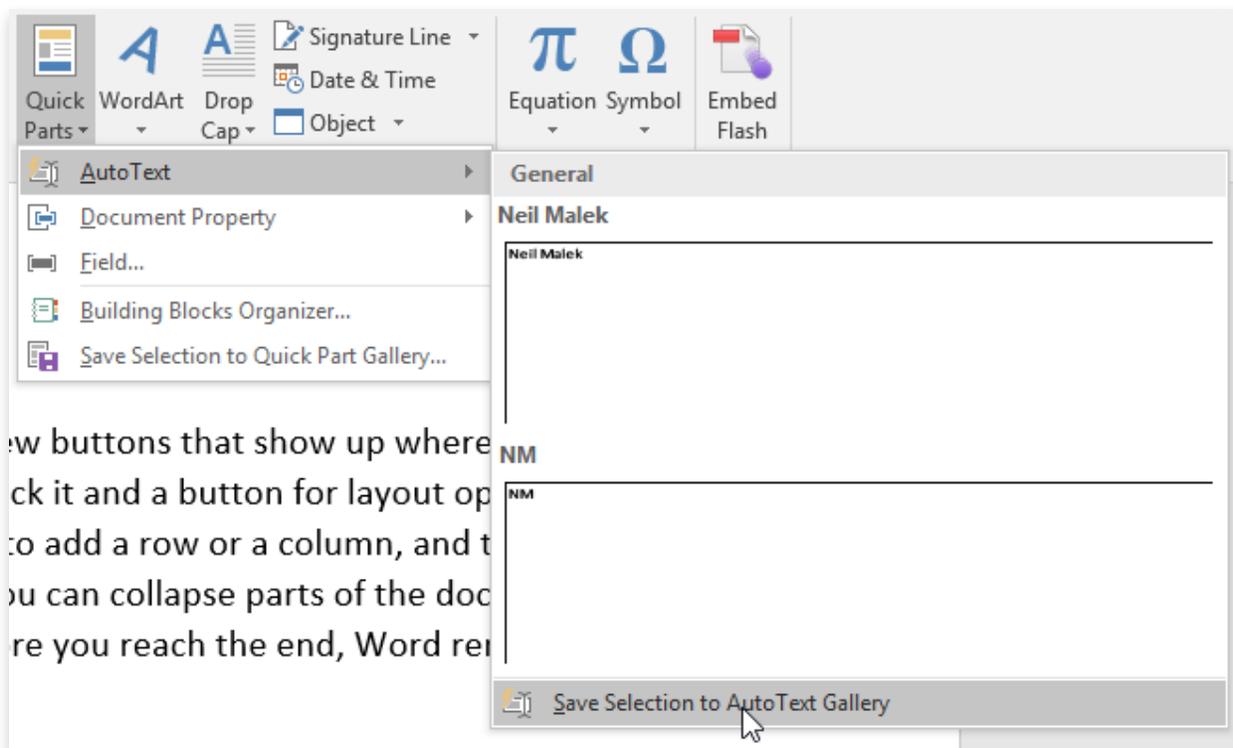
If you've typed a chunk of content that will be repeated across many documents, you can save that for reuse as a Quick Part. Select the content:

you can add a matching cover page, header, and sidebar.

Click Insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them.

To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus

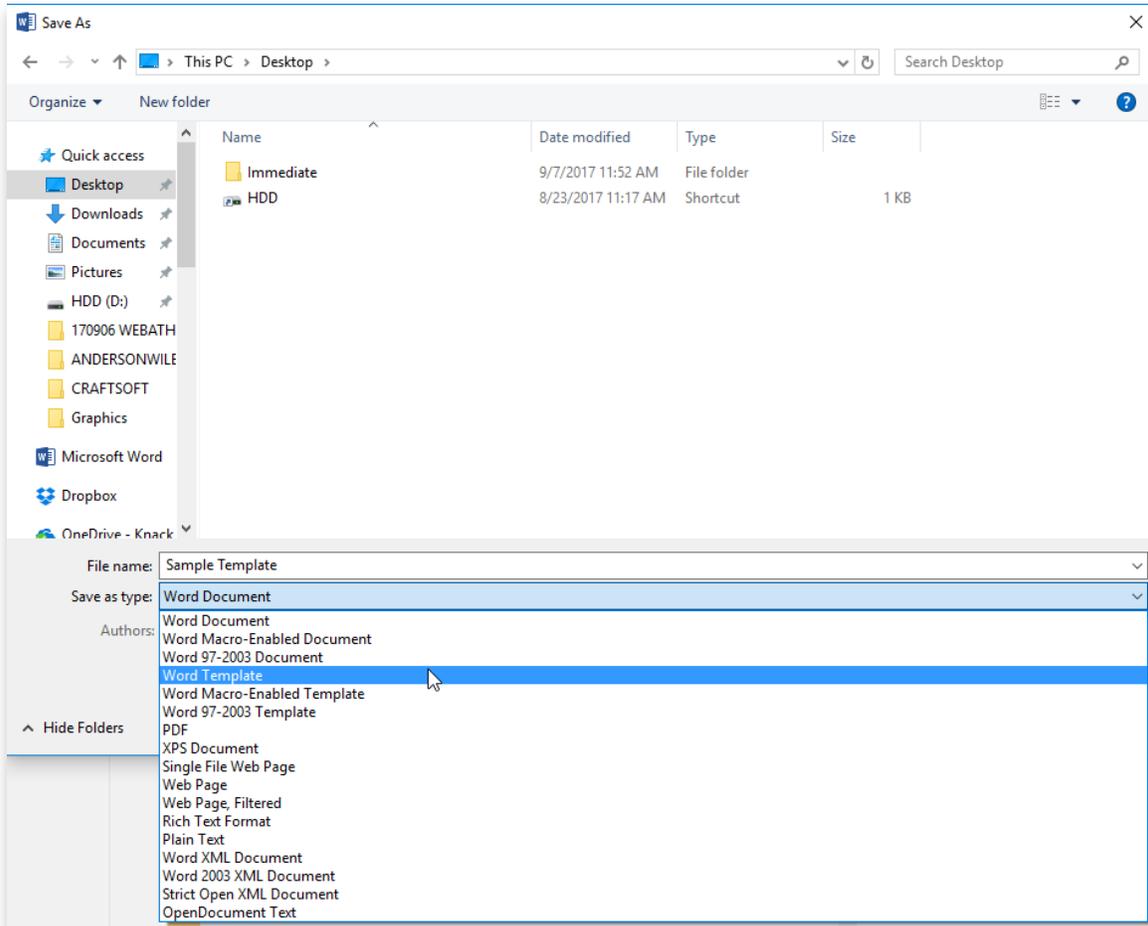
Then click **Insert Tab > Quick Parts > AutoText > Save Selection to AutoText Gallery**.



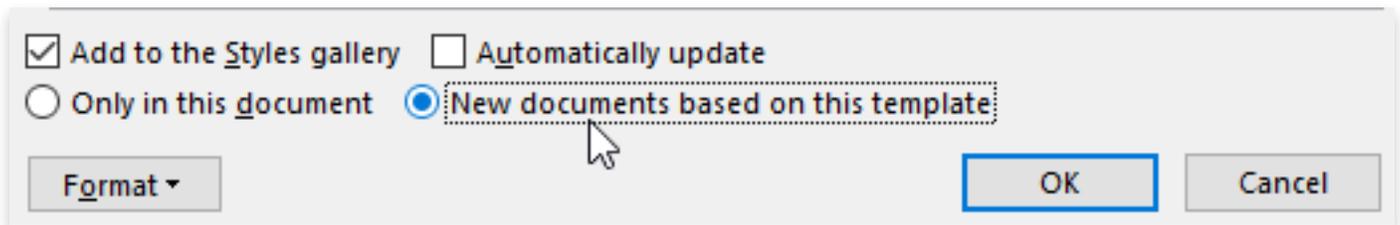
Finally, give it a name, and you'll be able to reuse it whenever you want.

TEMPLATES AND STYLES

You can save your style changes to the standard *normal template*, or to a custom template. To save the style to a custom template, make all your style changes, then make the file into a template by choosing **File Tab > Save As > Word Template (.dotx)**.



To make those changes within the Normal template, when you change a style, click the radio button at the bottom of the dialog - *New documents based on this template*.



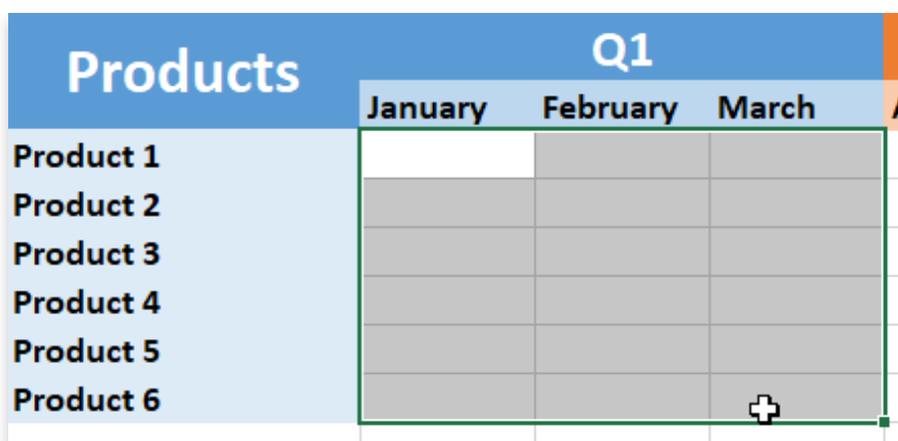
MICROSOFT EXCEL

In Excel, much of what's happening is hidden - cells display number values instead of calculations, and the source of a calculation might be on an entirely different sheet. We need to expose what's happening in our workbooks so we can control it more carefully.

NAMED RANGES

CREATING NAMED RANGES

First, select the cells to be named. Then, click in the **Name Box** in the top-left corner.



The screenshot shows an Excel spreadsheet with a table structure. The table has a header row with columns labeled 'Products' and 'Q1'. Under 'Q1', there are three sub-columns: 'January', 'February', and 'March'. The rows are labeled 'Product 1' through 'Product 6'. A green border highlights the data area from cell B2 to G7. The Name Box in the top-left corner of the spreadsheet displays 'Q1Sales'.

Products	Q1		
	January	February	March
Product 1			
Product 2			
Product 3			
Product 4			
Product 5			
Product 6			

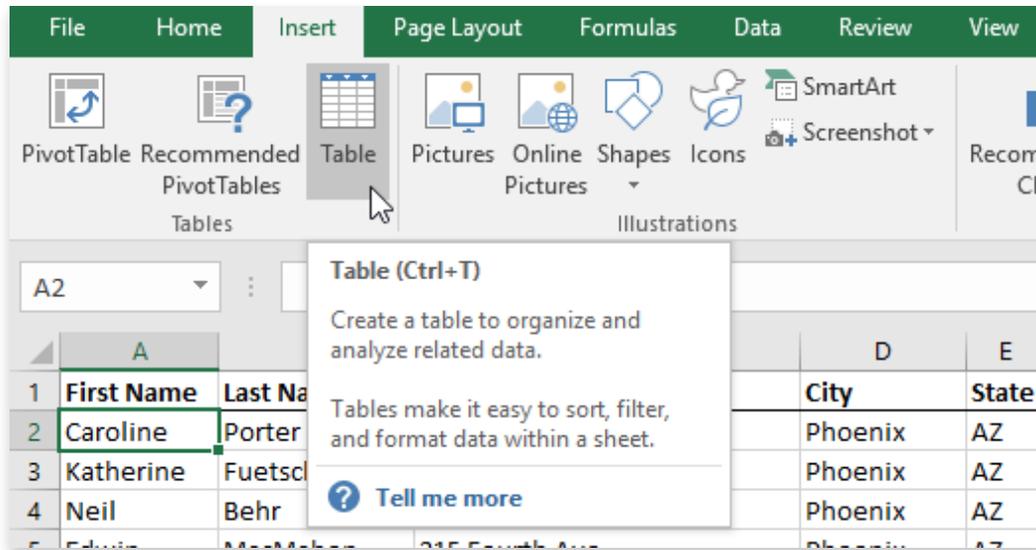
Type the name you want. Named Ranges cannot contain spaces, so I often use capitalization to mark the beginnings of new words. Press **[ENTER]** when you've typed the name to set it.



Q1Sales | I

DYNAMIC NAMED RANGES

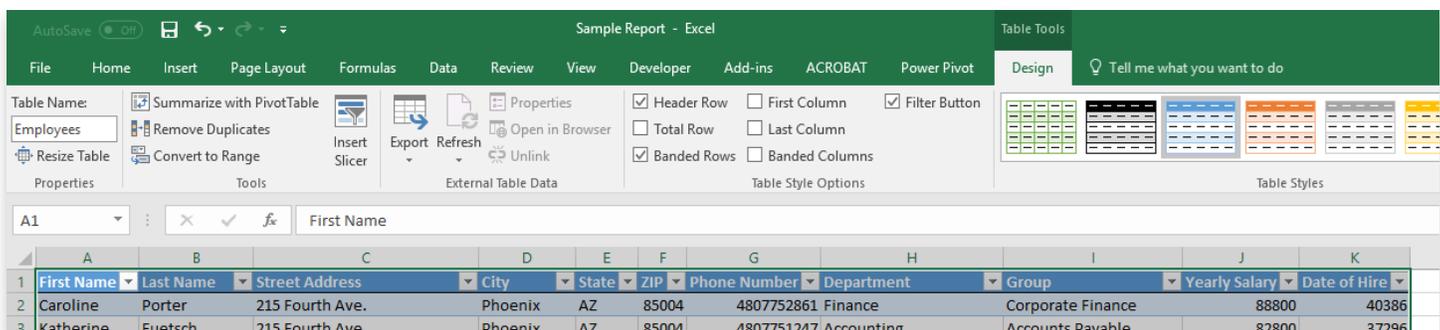
Select a set of cells to be turned into a *table*. Click **Insert Tab > Table**, or use the keyboard shortcut **[CTRL] + [T]**.



Make sure that Excel recognizes all the cells in your table, and that it has a header row. Click **OK**.



Now, name the table by clicking **Design Tab > Name**, and typing a name for the table. Names for tables follow the same rules as those for Named Ranges.



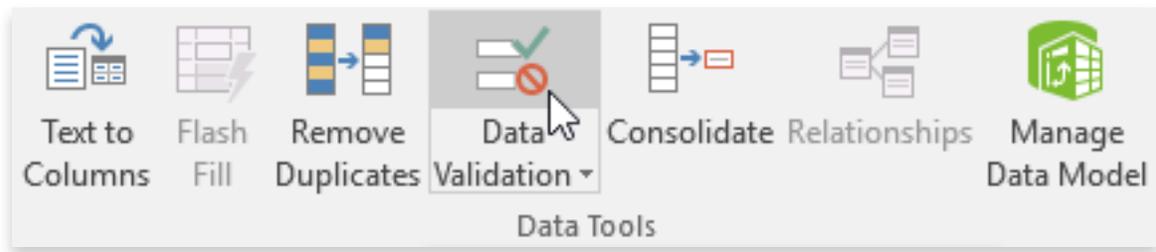
DATA VALIDATION

RANGE-BASED VALIDATION

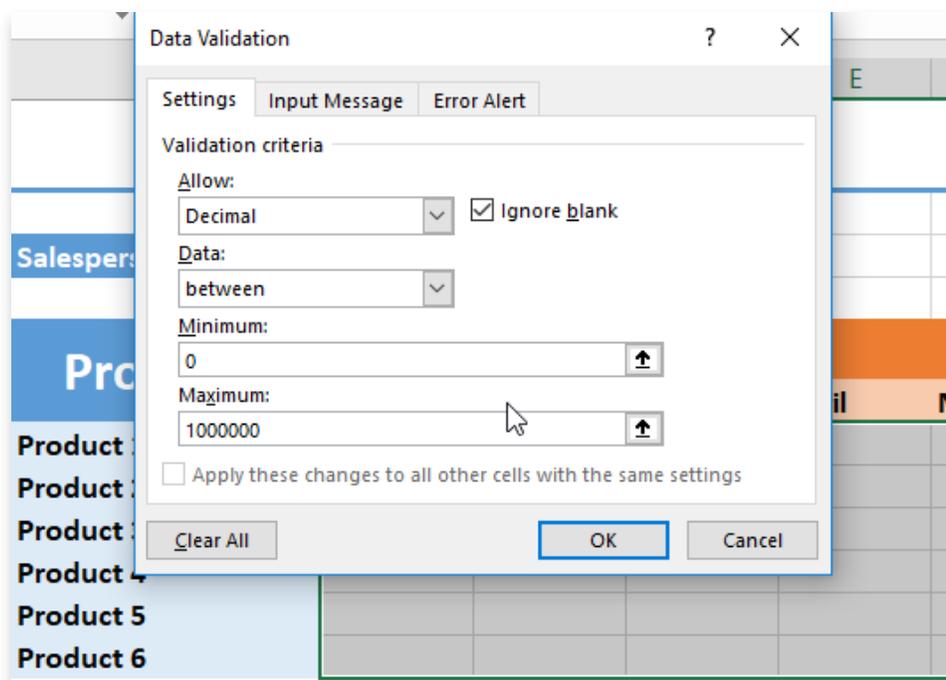
Select a set of cells to be validated.

Products	Q1			Q2			Q3			Q4		
	January	February	March	April	May	June	July	August	September	October	November	December
Product 1												
Product 2												
Product 3												
Product 4												
Product 5												
Product 6												

Click **Data Tab > Data Validation**.

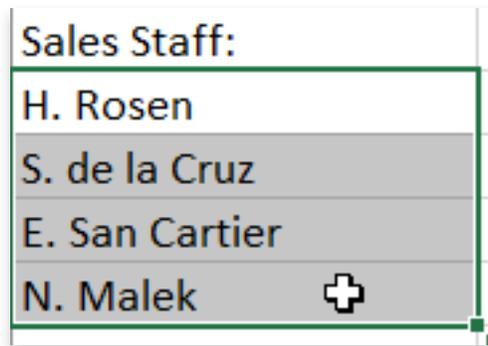


Choose either **Whole number** or **Decimal** from the initial drop-down menu, then add values for **Greater than**, **Between**, or any other setting that works for your situation.

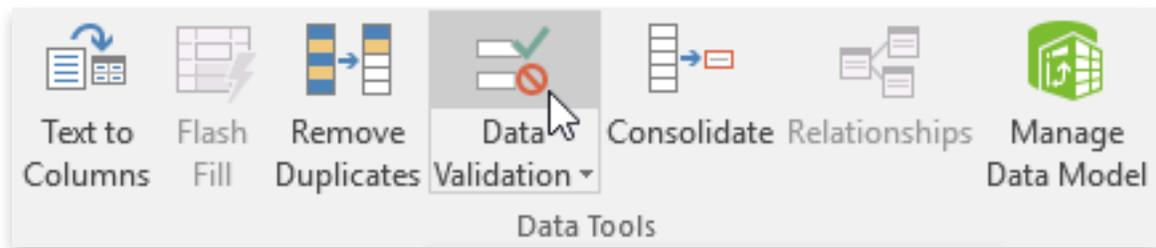


DROP-DOWN MENUS

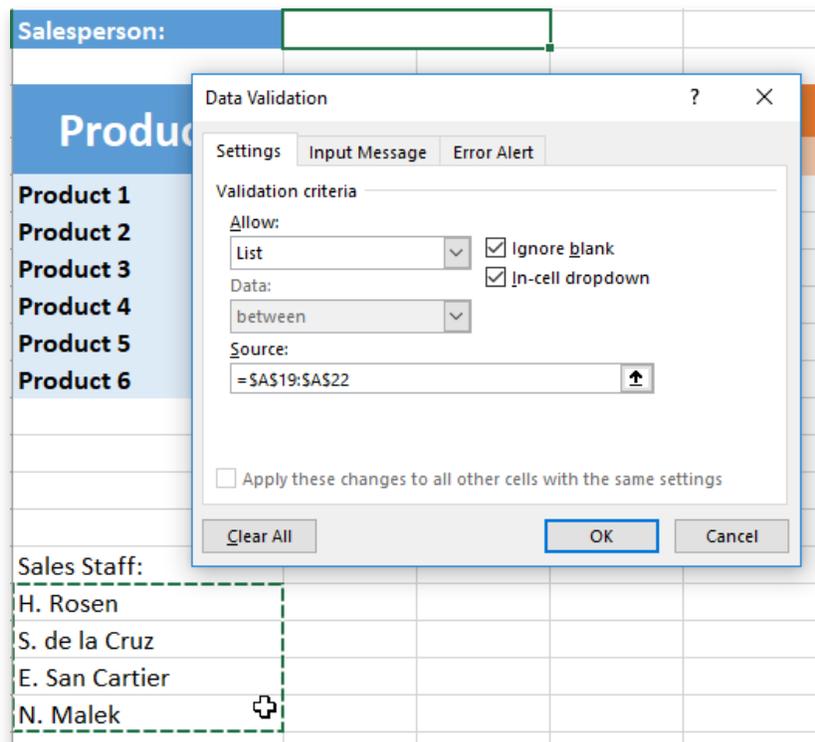
First, type out a set of values to be added to the menu:



Next, click **Data Tab > Data Validation**.



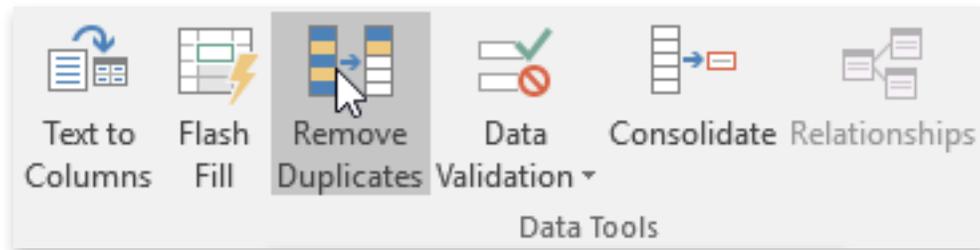
Choose **List** from the drop-down menu, and choose the set of cells you've typed values into:



DATA CLEANUP

REMOVE DUPLICATES

Select a set of cells to be manipulated. Click **Data Tab > Remove Duplicates**.



For absolute unique values, leave all the checkboxes selected and click **OK**.

FName	LName	EMP#	Dept	Shift	VDays	Hourly	Emp	Ret	Med
Teri	Binga	AW55	Sales	D	10	\$11.38	C	3.0%	Y
Dean	Kramer	AC49	Developmen	D	12.5	\$19.50	AW	1.0%	Y
Jacqueline	Banks	AS03	Staff	N	10	\$11.38	AW	0.0%	N
Jeri Lynn	MacF								
Joanne	Parke								
Peter	Allen								
Melanie	Bowe								
Steve	Singe								
Joshua	Macco								
Edward	Trelly								
Michael	Lewis								
Lynne	Simm								
Lindsey	Wing								
Frieda	Binga								
Esther	Willia								
Marianne	Calvir								
Grace	Sloan								
Lorrie	Sullivan	AW04	Sales	D	10	\$16.38	C	1.0%	Y
Alice	Owens	AW48	Sales	D	10	\$7.15	C	4.0%	N
Greg	Thomas	AC53	Developmen	N	12.5	\$21.78	AW	0.0%	Y
Erin	Binga	AA70	Research	D	15	\$15.73	C	7.0%	N
Amy	Tooley	AW59	Sales	D	10	\$8.45	AW	2.0%	N
Michael	Lewis	AW58	Sales	D	10	\$8.45	C	0.0%	Y
Lindsey	Winger	AW77	Research	D	15	\$31.20	AW	5.0%	N
Melanie	Bowers	AA35	Research	N	12.5	\$8.45	AW	7.0%	Y

Remove Duplicates

To delete duplicate values, select one or more columns that contain duplicates.

Select All Unselect All My data has headers

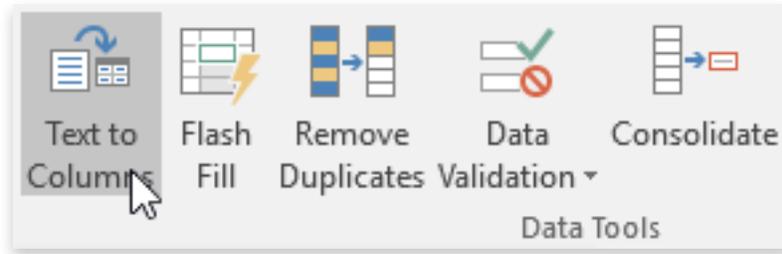
Columns

- FName
- LName
- EMP#
- Dept
- Shift
- VDays

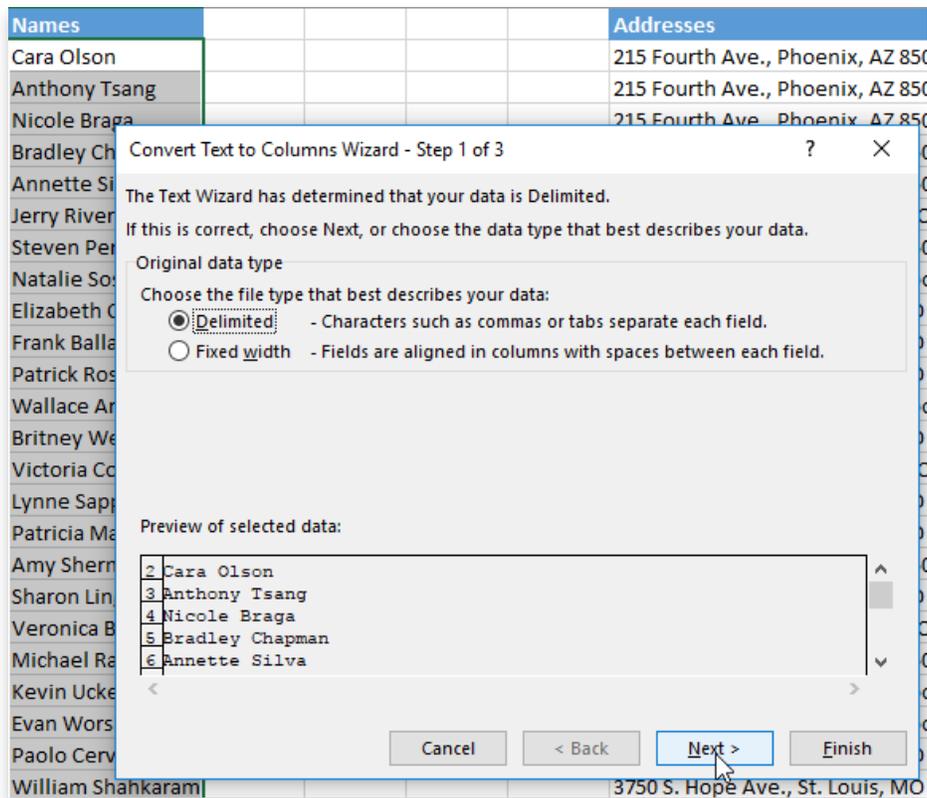
OK Cancel

TEXT-TO-COLUMNS

Select the set of cells to be manipulated. Click **Data Tab > Text to Columns**.



Unless your values have the same text length, choose **Delimited**.



Choose or manually type the delimiter you want to break the text by (you may want to do multiple steps for varied delimiters). Click **Finish**.

TEXT FUNCTIONS

To use the LEFT or RIGHT functions to get part of the content, select the cell you want to get data from, and choose the number of characters you need to retrieve:

L	M
ID No.	
MNI58269	=LEFT(L2,3)
RRY75624	
ALA76721	
ALA54750	
ALA93753	
MNI66235	

To make the number of characters dynamic, use the FIND function to determine where the delimiter is:

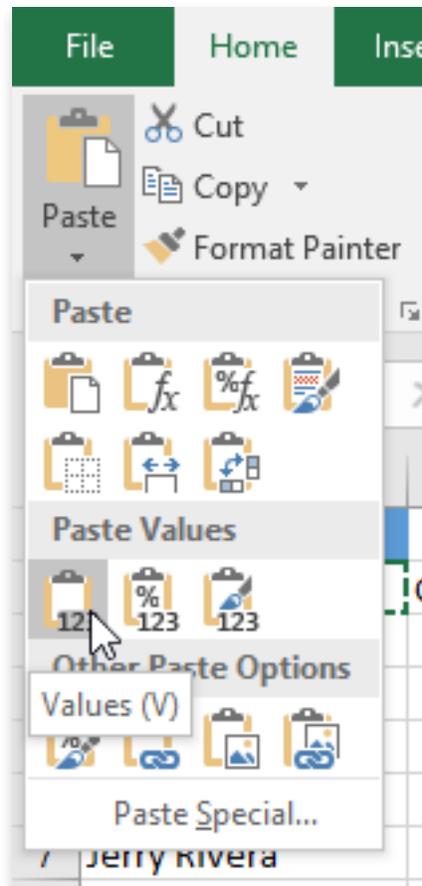
A	B
Names	
Cara Olson	=FIND(" ",A2)
Anthony Tsang	
Nicole Braga	
Bradley Chapman	
Annette Silva	
Jerry Rivera	

To combine these two factors, next FIND within LEFT or RIGHT. Be aware that you'll probably need to adjust your value from FIND - FIND tells you *where* the delimiter is, but you probably want to stop before or after the delimiter:

A	B	C	D
Names			
Cara Olson	=LEFT(A2,FIND(" ",A2)-1)		
Anthony Tsang			
Nicole Braga			
Bradley Chapman			

PASTE SPECIAL

Once you have *calculated* a value, you'll often want to make that value permanent by copying (**[CTRL] + [C]**) and Paste Special: Values:



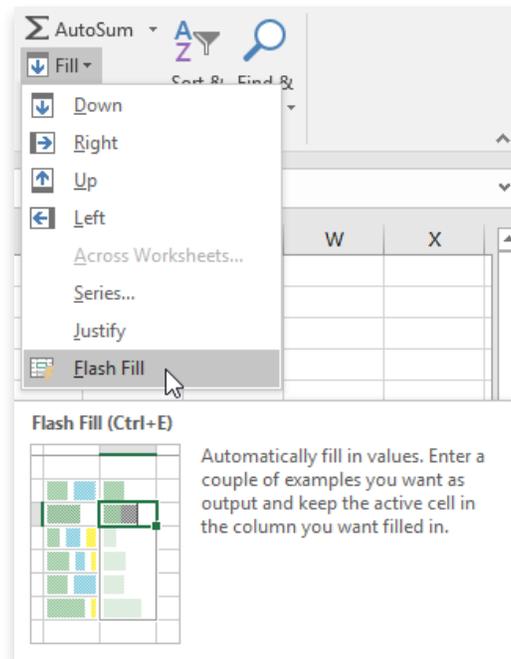
The alternate keyboard shortcut is **[ALT] + [E], [S], [V]**.

FLASH FILL

For Flash Fill to work properly, you need to do enough manual work that Excel can pick up the pattern you're interested in:

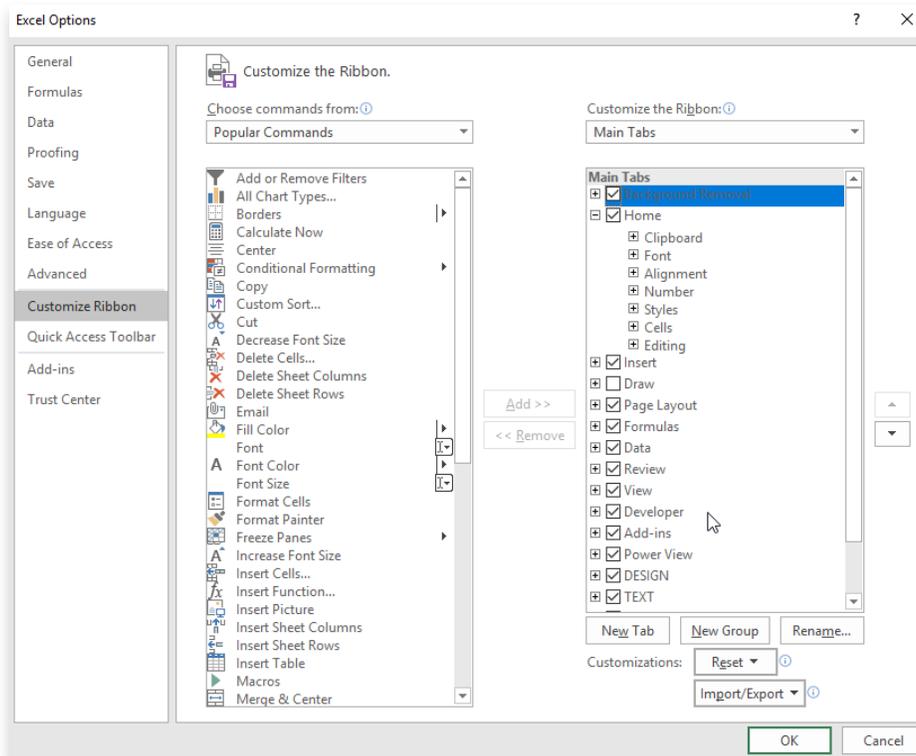
F	G	H
Addresses		
215 Fourth Ave., Phoenix, AZ 85004	Phoenix	
215 Fourth Ave., Phoenix, AZ 85004		
215 Fourth Ave., Phoenix, AZ 85004		
215 Fourth Ave., Phoenix, AZ 85004		
215 Fourth Ave., Phoenix, AZ 85004		
33 Shoreline Blvd., Foster City, CA 94404		
215 Fourth Ave., Phoenix, AZ 85004		
1225 NW 1733rd Blvd., Minneapolis, MN 55403		
3750 S. Hope Ave., St. Louis, MO 63005		

Now, use **Home Tab > Fill > Flash Fill**, or the keyboard shortcut **[CTRL] + [E]**.

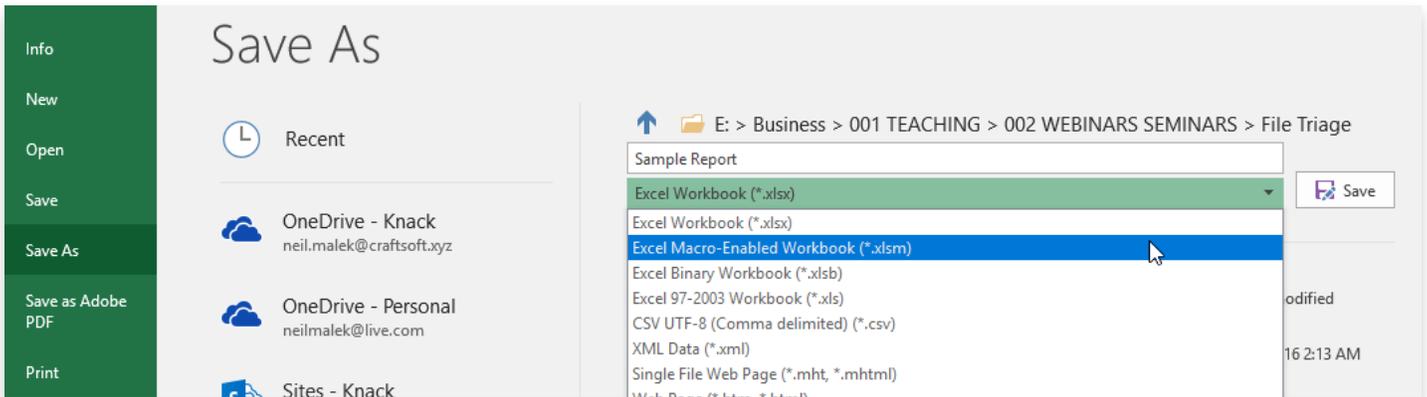


MACROS

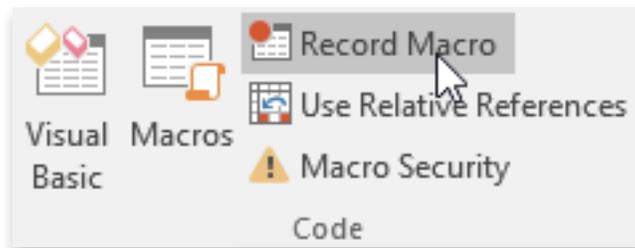
To record a macro, turn on the **Developer Tab** by clicking **File Tab > Options > Customize Ribbon > Developer** checkbox marked:



If your file is going to hold the macro, **File Tab > Save As > Excel Macro-Enabled Workbook (.xlsm)**.

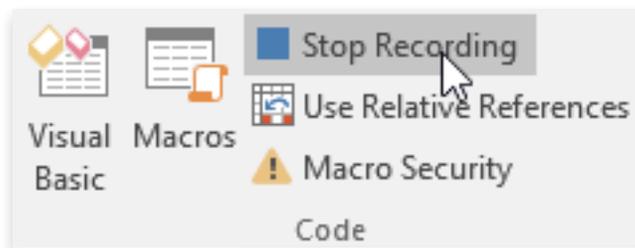


Now, press **Developer Tab > Record Macro**.



Perform any steps you want.

Press **Developer Tab > Stop Recording**.



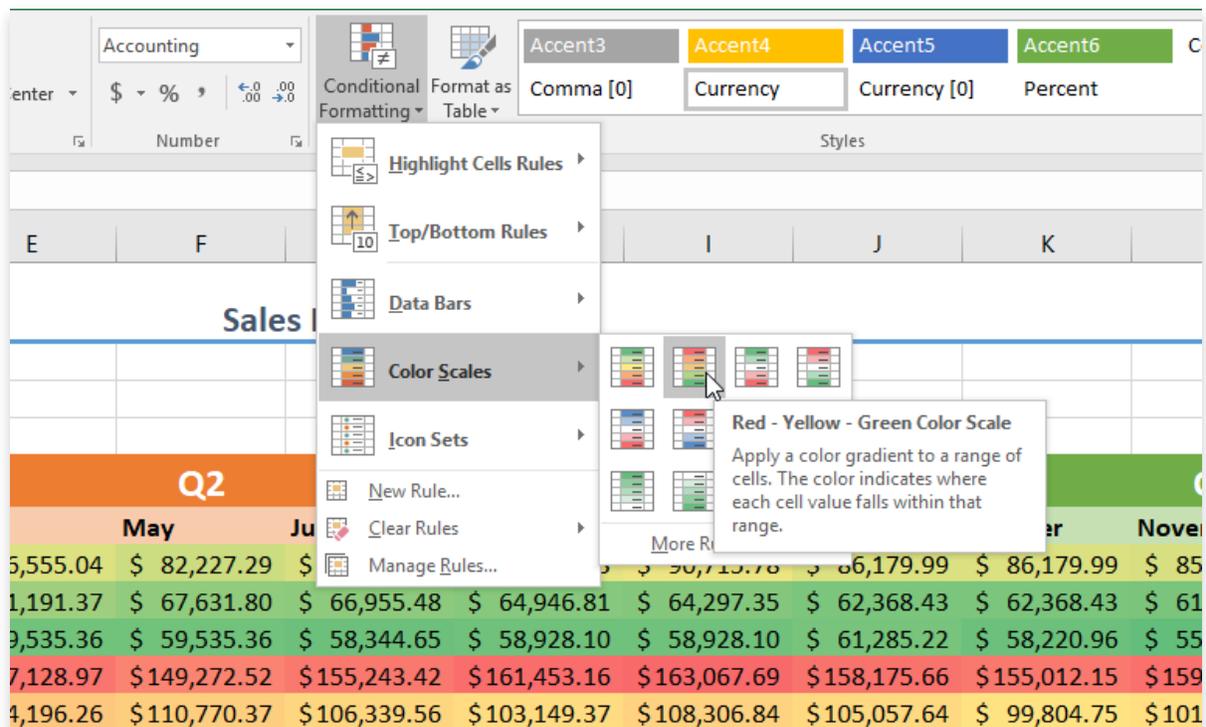
HIGHLIGHTING ISSUES

RANGE-BASED CONDITIONAL FORMATTING

Select your cells to be color-coded.

Sales Report												
Salesperson:												
Products	Q1			Q2			Q3			Q4		
	January	February	March	April	May	June	July	August	September	October	November	December
Product 1	\$ 82,500.00	\$ 80,025.00	\$ 83,226.00	\$ 86,555.04	\$ 82,227.29	\$ 85,516.38	\$ 88,937.03	\$ 90,715.78	\$ 86,179.99	\$ 86,179.99	\$ 85,318.19	\$ 87,877.73
Product 2	\$ 68,500.00	\$ 71,925.00	\$ 70,486.50	\$ 71,191.37	\$ 67,631.80	\$ 66,955.48	\$ 64,946.81	\$ 64,297.35	\$ 62,368.43	\$ 62,368.43	\$ 61,744.74	\$ 64,831.98
Product 3	\$ 68,000.00	\$ 65,280.00	\$ 62,016.00	\$ 59,535.36	\$ 59,535.36	\$ 58,344.65	\$ 58,928.10	\$ 58,928.10	\$ 61,285.22	\$ 58,220.96	\$ 55,892.12	\$ 58,686.73
Product 4	\$ 139,700.00	\$ 146,685.00	\$ 151,085.55	\$ 157,128.97	\$ 149,272.52	\$ 155,243.42	\$ 161,453.16	\$ 163,067.69	\$ 158,175.66	\$ 155,012.15	\$ 159,662.51	\$ 151,679.39
Product 5	\$ 117,800.00	\$ 113,088.00	\$ 115,349.76	\$ 114,196.26	\$ 110,770.37	\$ 106,339.56	\$ 103,149.37	\$ 108,306.84	\$ 105,057.64	\$ 99,804.75	\$ 101,800.85	\$ 104,854.87
Product 6	\$ 141,200.00	\$ 142,612.00	\$ 136,907.52	\$ 141,014.75	\$ 143,835.04	\$ 143,835.04	\$ 138,081.64	\$ 139,462.46	\$ 140,857.08	\$ 138,039.94	\$ 138,039.94	\$ 142,181.14

Click **Home Tab > Conditional Formatting**, and choose one of the **Color Scales**:

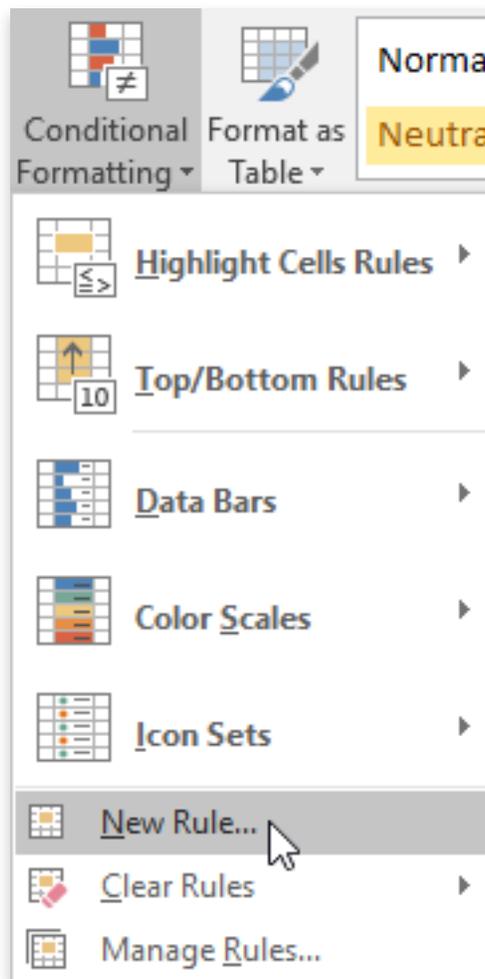


FUNCTION-BASED CONDITIONAL FORMATTING

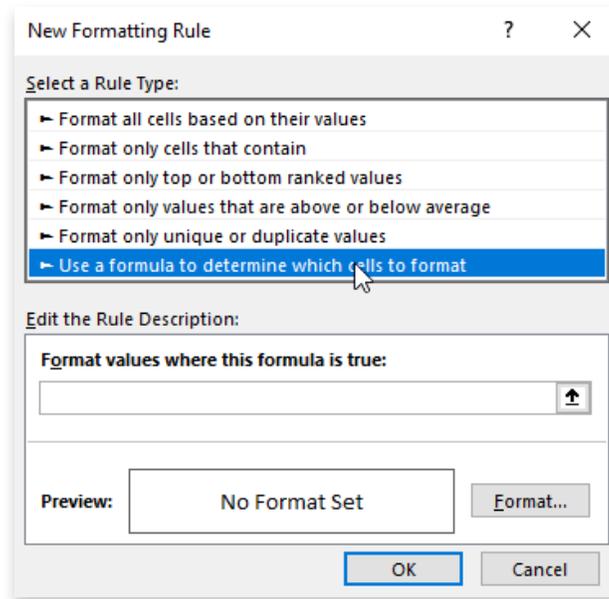
Select the cells to be color-coded.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	First Name	Last Name	Street Address	City	State	ZIP	Phone Number	Department	Group	Yearly Salary	Date of Hire		State	Department
2	Caroline	Porter	215 Fourth Ave.	Phoenix	AZ	85004	4807752861	Finance	Corporate Finance	88800	40386		AZ	Finance
3	Katherine	Fuetsch	215 Fourth Ave.	Phoenix	AZ	85004	4807751247	Accounting	Accounts Payable	82800	37296			
4	Neil	Behr	215 Fourth Ave.	Phoenix	AZ	85004	4807754188	Human Resources	Policies and Benefits	102600	40603			
5	Edwin	MacMahon	215 Fourth Ave.	Phoenix	AZ	85004	4807753829	Finance	Risk Management	124500	36746			
6	Tara	Pearson	215 Fourth Ave.	Phoenix	AZ	85004	4807753311	Human Resources	Policies and Benefits	86600	37662			
7	Christina	Fox	33 Shoreline Blvd.	Foster City	CA	94404	5102105815	Information Technology	Hardware and Software	53600	40457			
8	Clara	Evans	215 Fourth Ave.	Phoenix	AZ	85004	4807751946	Marketing	Conventional Media	59400	38297			
9	Emma	Chen	1225 NW 1776th Blvd., Ste. 350	Minneapolis	MN	55403	6124006547	Production	Production	53000	40014			
10	Lily	Pfeffer	3750 S. Hope Ave.	St. Louis	MO	63005	3146705136	Information Technology	Hardware and Software	62100	41779			
11	Aiden	Davies	3750 S. Hope Ave.	St. Louis	MO	63005	3146702625	Marketing	Online Marketing	75100	40401			
12	Evelyn	Hayes	3750 S. Hope Ave.	St. Louis	MO	63005	3146704842	Human Resources	Policies and Benefits	103600	41679			
13	Tommie	Van Houten	1225 NW 1776th Blvd., Ste. 350	Minneapolis	MN	55403	6124002334	Accounting	Accounts Payable	77100	40507			
14	John	Chapman	3750 S. Hope Ave.	St. Louis	MO	63005	3146703716	Marketing	Online Marketing	62700	37102			
15	Kevin	Delgado	33 Shoreline Blvd.	Foster City	CA	94404	5102103262	Production	Production	75000	41408			
16	Lynne	Filkins	3750 S. Hope Ave.	St. Louis	MO	63005	3146705897	Accounting	Accounts Receivable	91400	36890			
17	Robyn	Finlayson	3750 S. Hope Ave.	St. Louis	MO	63005	3146703900	Finance	Corporate Finance	83700	39506			
18	Charie	Tramont	215 Fourth Ave.	Phoenix	AZ	85004	4807751302	Information Technology	Help Desk	45400	41229			
19	Andrea	Boyd	3750 S. Hope Ave.	St. Louis	MO	63005	3146704793	Accounting	Accounts Receivable	95900	41276			

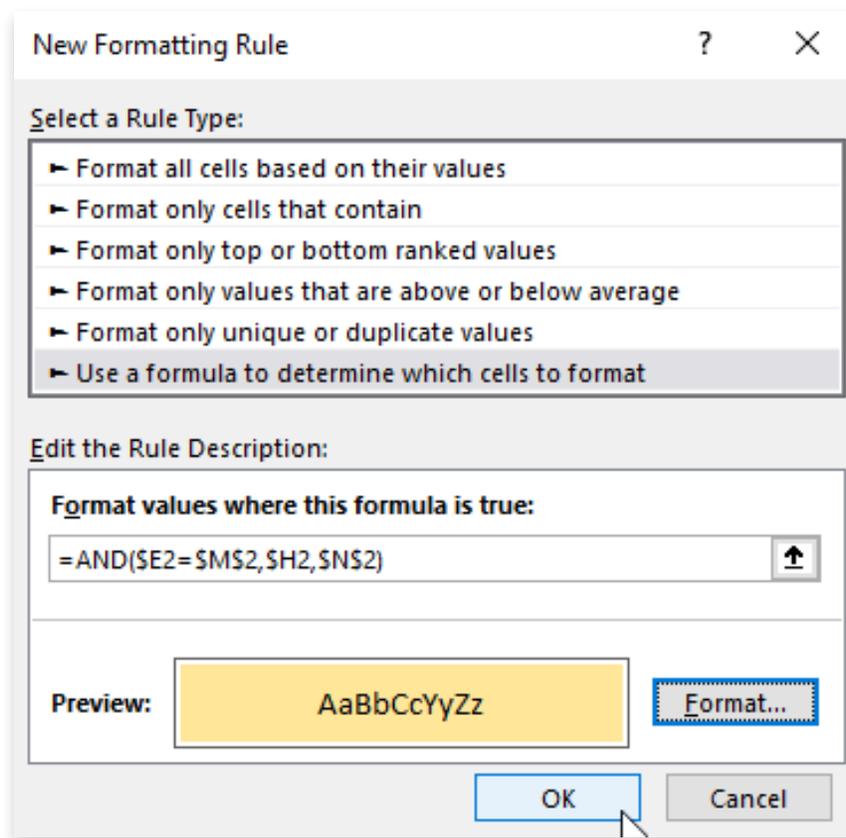
Click **Home Tab > Conditional Formatting**, and choose **New Rule...**



Choose **Use a formula to determine which cells to format**.

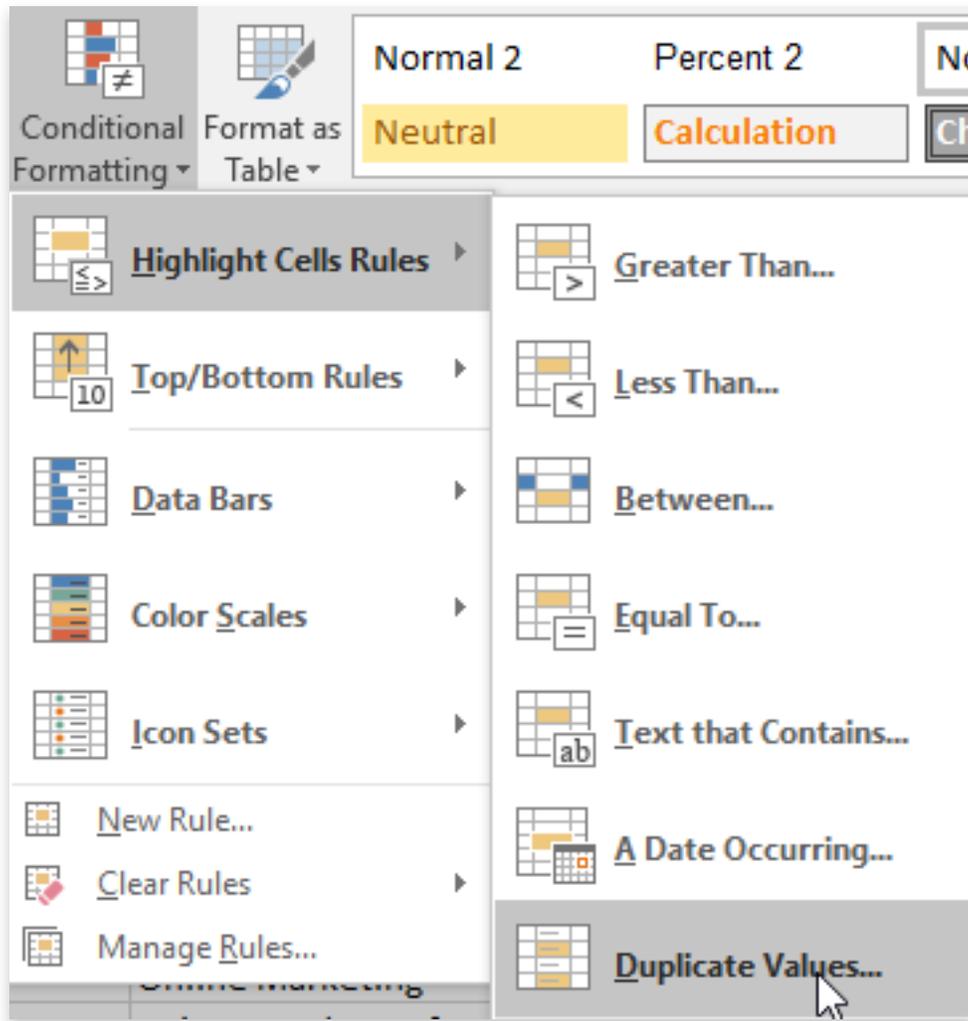


Build a logical function that will evaluate to TRUE for items that should be color-coded, and FALSE for items that shouldn't be color-coded. In this example, we're combining the state and department with the AND function:



PINPOINTING DUPLICATES

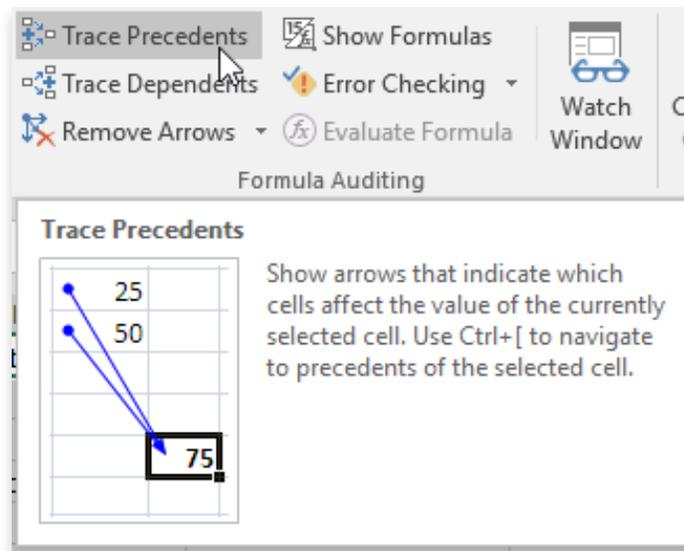
Click **Home Tab > Conditional Formatting > Highlight Cell Rules > Duplicate Values**.



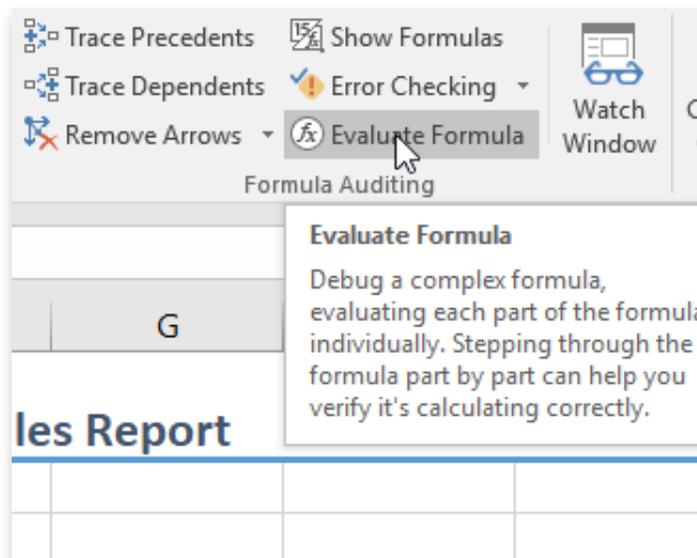
FIXING CALCULATIONS

FORMULA AUDITING

If you're unsure what's happening with a calculation, try using **Trace Precedents** (Formulas Tab > Trace Precedents) to see what references are feeding into the function. This will demonstrate whether the references are accurate.

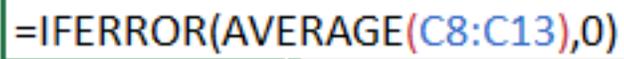


To see where a function breaks, click **Formulas Tab > Evaluate Formula**, and evaluate the segments of the function.



IFERROR NESTING

If you know that your use of AVERAGE, VLOOKUP, or other function may result in an error, you can handle that by nesting the function within the IFERROR function:



```
=IFERROR(AVERAGE(C8:C13),0)
```

Setting the 'if error' value will make the output more user-friendly.

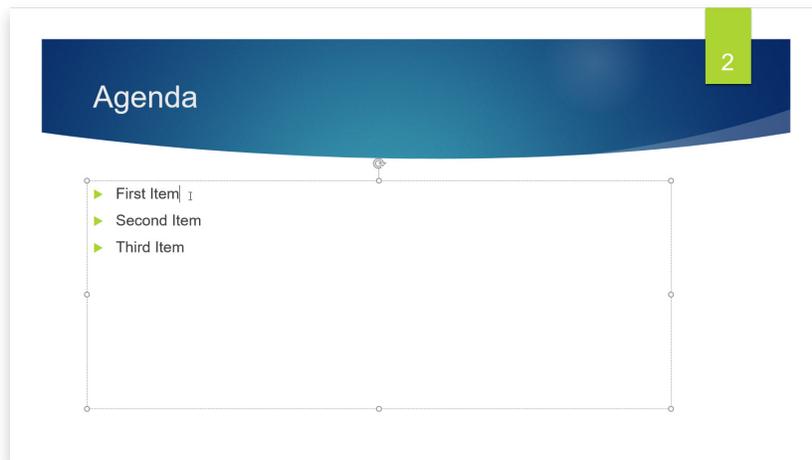
MICROSOFT POWERPOINT

Make your presentations better and more consistent with these tools.

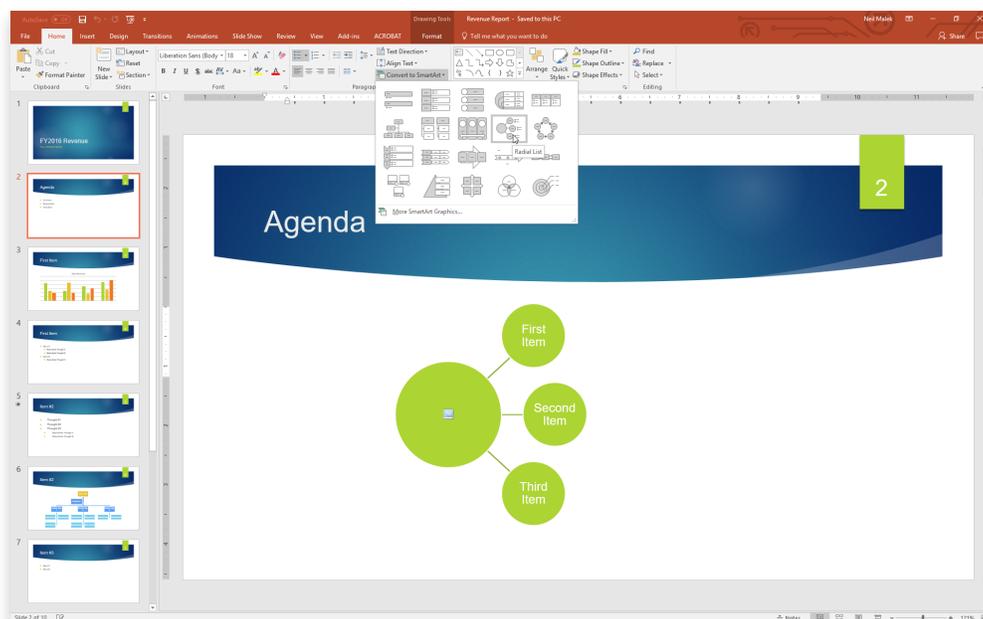
GETTING RID OF BULLET POINTS

SMARTART

Click within a set of bullet points, so the blinking cursor appears within the textbox:

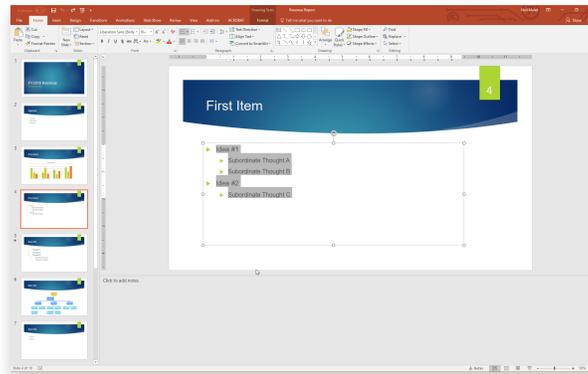


Now, click **Home Tab > Convert to SmartArt**, and choose the diagram type that best illustrates the context of the bullets.

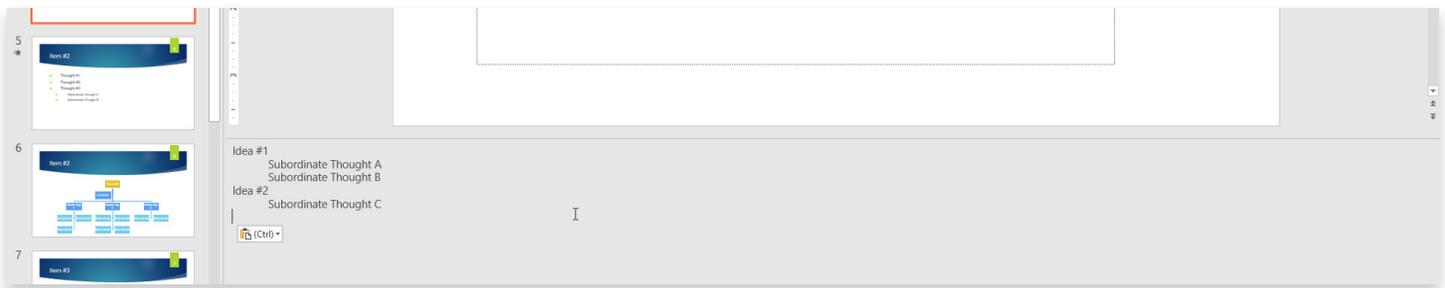


SPEAKER NOTES

Select your bulleted text, and use **[CTRL] + [X]** to cut the content from the slide.



Expand your Speaker Notes area at the bottom of the screen, and use **[CTRL] + [V]** to paste the content into the Speaker Notes area. You can elaborate on your content here, since it doesn't have to be read during the presentation.



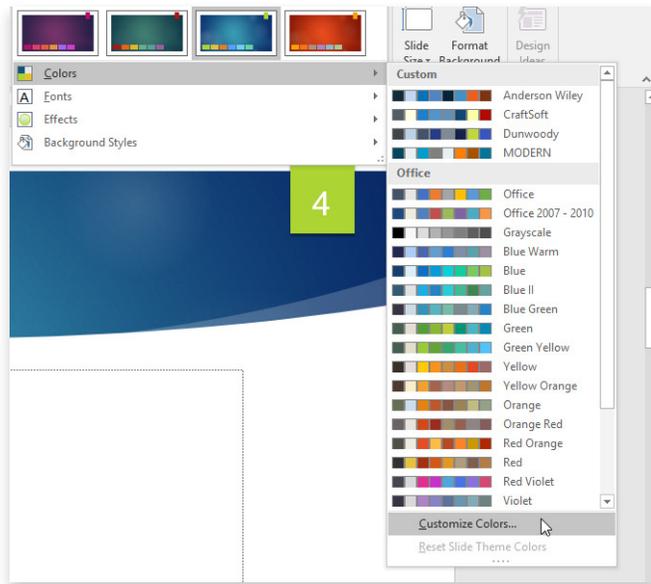
To use these notes for others after the session, click **File Tab > Export > Handouts > Create Handouts**, and the slides and notes will be put into a Word handout format.



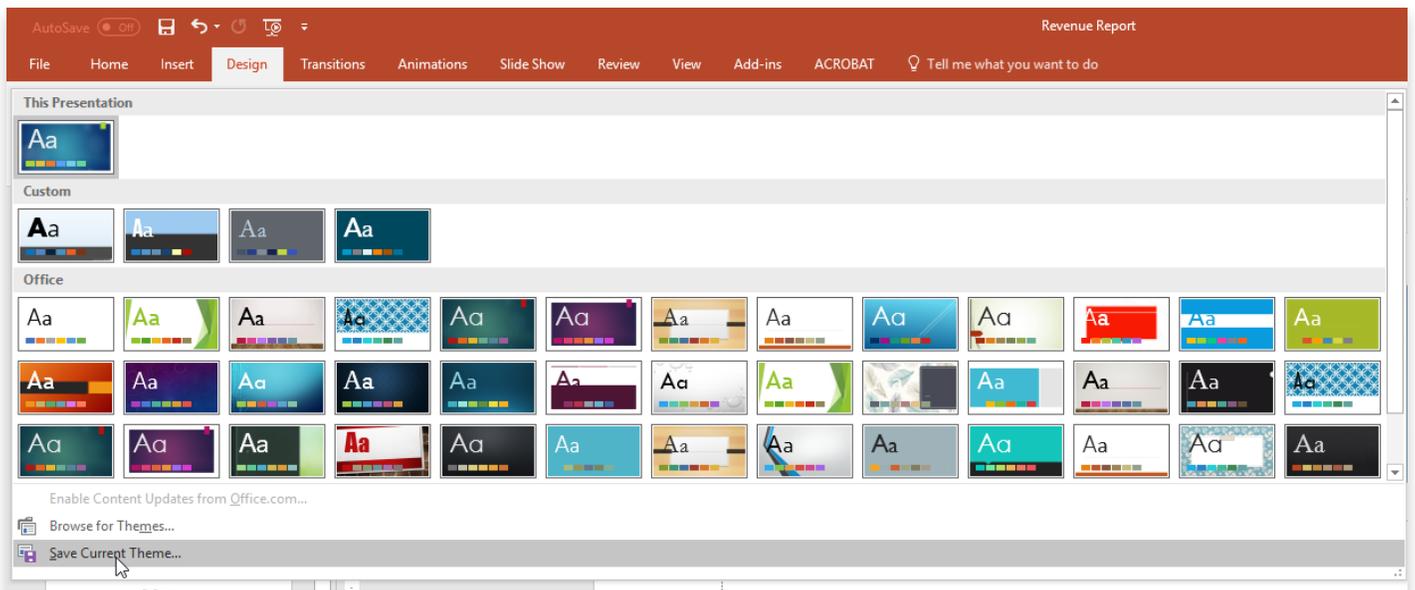
FORMATTING

THEMES

To create an Office Theme, click **Design Tab > Variants** and choose **Customize** for Fonts and Colors:

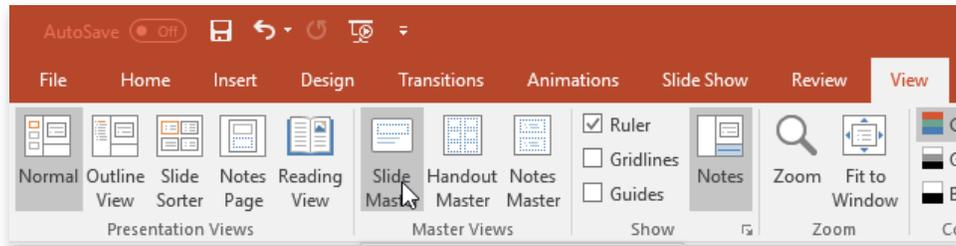


Then click **Design Tab > Themes > Save Current Theme** to save the changes you've made.



SLIDE MASTERS

To affect all the slides in the presentation, click **View Tab > Slide Master**.



Find the topmost slide (the *slide master* for the presentation). Any aesthetic changes you make here (font, positioning, color) will then filter to the *slide layouts* and ultimately the actual slides of the presentation.



SLIDE LAYOUTS

To affect the layout of a particular slide type, click **View Tab > Slide Layout**.

The program will automatically choose the layout that's applied to your current slide. If necessary, navigate to the layout you're interested in.

Finally, any aesthetic changes you make to this layout will make the changes *away* from the choices made in the slide master, and affect the slides that use that layout.

TEMPLATES

To save Themes, Masters, Layouts, *and* content for a presentation starting point, click **File Tab > Save As > PowerPoint Template (.potx)**.

