



## IT Tips and Tricks #4

### ***Making the best use of Microsoft Office***

Many businesses make use of the Microsoft Office Suite of programs (whether using Versions '95, '97, 2000 or 2002 ("XP") – the most recent version) without really doing much more than scratching the surface of what is available. The purpose of these edition of Tips and Tricks is to highlight some of the additional features and uses to which the programs may be utilised.

#### ***Word***

Some users merely use Word as an electronic typewriter; however, it is much more than that...

- In addition to assisting you to write your letters more efficiently with the use of its spell and grammar checkers, using the *AutoCorrect* facility and *Macros* can speed up any repetitive work
- Letterheads and regularly used documents can be set up as *Templates* to avoid the risk of saving over existing documents
- *Headers and Footers* can be used to record company information within a letterhead, e.g. VAT and company Registration numbers or details of directors or the company logo. They can also record page numbers and chapter headings for longer documents
- *Indexes, Tables of Contents, Footnotes* and *Hyperlinks* can make longer documents or reports more readable and easily navigated
- Using the full set of *Styles, Bulleted or Numbered lists* and *Font or Paragraph formatting* can add impact and readability to documents
- *Master Documents* and *Sub Documents* can make the production of, for example, training or other manuals a more efficient process
- The use of *Mail Merge* can make the sending of newsletters or mail shots a simple process
- *Tables* can be used in the production of minutes and other documents where a multi columnar layout is required

#### ***Excel***

Many people associate Excel with "number crunching" – however, it can be used for much more than this allowing a user to organise and manipulate data and perform calculations, such as...

- Interactive sales analyses using *Pivot Tables* and *Charts* can aid in the effective management of a business
- The power and flexibility of the formulae and functions available make Excel a superb product for producing cash flow forecasts, budgets and management accounts
- *Hyperlinks* and *Named Ranges* can make navigating the spreadsheet a simple process
- *Cell comments* can be used to explain how formulae work or where information has been obtained from to help in the understanding of a spreadsheet
- *Styles* are used to ensure that the same type of information (e.g. totals, protected calculations, input areas) always appear the same throughout the spreadsheet
- *Conditional formatting* allows data to be automatically highlighted when certain criteria are met (e.g. sales above or below certain values)
- *Scenarios* allow for different sets of information (e.g. sales volumes) to be held within the same spreadsheet, whilst Goal Seek and Solver allow complex costing or budgeting exercises to be carried out accurately



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- The database functions of Excel (*Filters, Subtotals, Sorting and Grouping and Outlining*) make it a useful tool for managing large amounts of data, whether these are lists of sales, clients or products

## Access

Access is the main Relational Database within the Office Suite of programs. A database is a collection of similar information about a subject. In its simplest form it is a list, e.g. telephone directory, but this can be extended to a management tool e.g. assist with managing a company's client list. Some examples of the sort of databases that can be created are...

- Client or customer lists used for mail merges (linking to Word), call records and contracts held
- Managing employees and aiding the recruitment process
- Purchase and sales order systems
- Asset registers: Equipment, Hardware & Software, equipment out on hire
- Events management
- Inventory and warehouse control
- Help desk and project management
- Producing quotations and invoices for customers

## PowerPoint

This allows the user to create a slide show on their computer. For example used as a tool to assist in the explanation of a business idea or plan, at a sales conference or customer presentation, PowerPoint can add impact to an already good idea or assist in its explanation. Its use on training courses is widespread as it allows the trainer to assist all delegates in their understanding of the product that is the subject of the course.

In addition, when made interactive, it can be used in its own right as a training medium for a product or service.

## Publisher

- Publisher allows the user to produce professional looking promotional material to assist with the marketing of the business.
- Linked with, for example, Excel, regularly updated price lists can be professionally produced very quickly.
- Instruction and informational booklets can easily be produced using Publisher

## Outlook

Microsoft Outlook is a messaging and personal information management program that helps you manage your messages, appointments, contacts, and tasks.

- Set up different folders and use the *Rules Wizard* to automatically direct messages to them depending on sender or type of message (or FAX)
- Use *Contacts* as a source for a mail merge in Word
- Use *Tasks* as a reminder of what needs to be done; sort them using priorities or categories or manually
- Create *Signatures* for emails to include company and contact details or disclaimer notices