

A blurred background image of an office setting. Three people are visible: a man in a dark suit on the left, a woman in a light-colored blazer in the center, and another man in a grey blazer on the right. They appear to be in a meeting or collaborative work environment. The text is overlaid on the left side of this image.

# The best Microsoft Office 365 tips for busy HR professionals

# Welcome, busy HR Pro

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As an HR professional, your mission is to recruit and retain great people, and empower them to do their best work. We realize what a big and important job that is.

HR professionals like you told us that Microsoft Office 365 is a big part of how they get things done every day. So, we decided to lend you a helping hand. We've created this guide to help you save time in your day-to-day work, and to spark ideas for getting even more out of Office.

Here are some of the tips you'll find in this guide:

- Spend less time typing frequently used terms and paragraphs
- Quickly write and review documents with colleagues
- Keep email under control
- Get more things done on your phone
- Streamline employee onboarding
- Visualize and analyze data
- Engage employees with better online trainings

Want to learn even more? If you're an HR professional who gets excited about technology, and you're often looking for new ways to be more productive, you should [join our exclusive Microsoft Office 365 Champion Program](#). You'll have access to the latest Office resources and connect with a community of like-minded professionals.

Finally, if you have colleagues who can benefit from these tips, please share this e-book with them <http://aka.ms/officeHRTips>.

Best wishes,

Sanjeevini Mittal  
Group Manager Office 365  
Microsoft Corporation

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# Save hundreds of keystrokes every day

## Type a few letters, get HR terms

Every industry, company and job has its terminology. Undoubtedly, you use certain terms, phrases or sentences many times per day, like "employee engagement", "employee benefits", or "Please let me know if you have any questions or comments." With **AutoCorrect**, you won't need to type those again.

### Set it up

1. In Microsoft Word, click **File** > **Options** > **Proofing** > **Autocorrect Options**

AutoCorrect: English (United States)

AutoFormat Math AutoCorrect AutoFormat As You Type

☒ Show AutoCorrect Options buttons

☒ Correct TWo INitial CAPITALS

☒ Capitalize first letter of sentences

☒ Capitalize first letter of table cells

☒ Capitalize names of days

☒ Correct accidental usage of cAPS LOCK key

☒ Replace text as you type

Replace: With: ☒ Plain text ☐ Formatted text

(c)	©
(e)	€
(r)	®
(tm)	™
...	...
:(	*

Add Delete

☒ Automatically use suggestions from the spelling checker

OK Cancel

2. Type "zeb" and "employee benefits". Click **Add**.

☒ Replace text as you type

Replace: With: ☒ Plain text ☐ Formatted text

zeb employee benefits

(c)	©
(e)	€
(r)	®
(tm)	™
...	...
:(	*

Add Delete

## Tip

Make sure your abbreviations are non-existing words, or you'll have a frustrating experience. To create non-existing abbreviations, start them with the letter "z" or "q".

3. Type "*zta*" and "*talent acquisition*" and click **Add**. Type "*zdi*" and "*Diversity and Inclusion*". Click **Add**.
4. Type "*zplm*" and "*Please let me know if you have any questions or comments.*" Click **Add**.
5. Click **OK**. Click **OK**.

Now use it

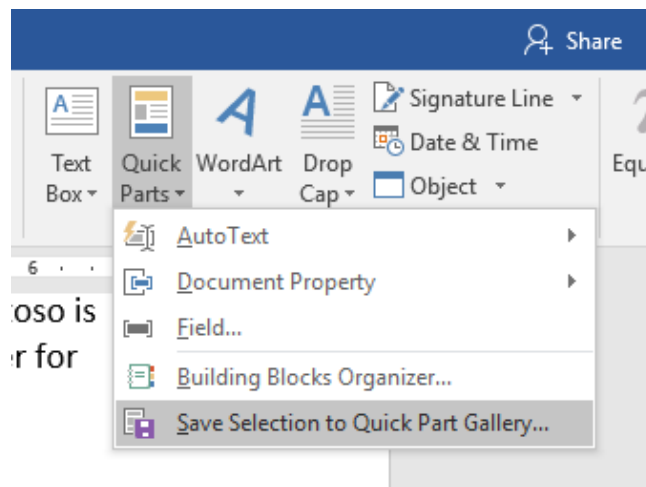
6. Now type "*zta*" followed by a space, Enter, or punctuation and it will change to "talent acquisition".
7. Repeat with "*zeb*", "*zdi*" and "*zplm*".

## Re-use paragraphs over and over

Do you tend to re-use the same paragraphs in documents and email messages? The description of your company, the company values, the mission of the HR department, a response to an applicant, an equal opportunity employer statement, a "best place to work" banner. Tired of typing those paragraphs in Word? Or copying and pasting them in Outlook? Then this tip is for you.

Set it up

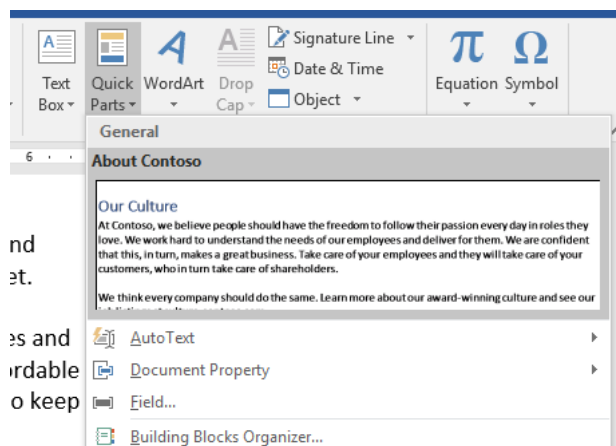
1. In Word, select one or more paragraphs you use frequently, for example a description of your company or the mission of the HR department.
2. Click **Insert** > **Quick Parts** > **Save selection to Quick Part Gallery**.



3. Type a name for the Quick Part, for example *About*.

Use it

4. Position your cursor in a Word document.
5. Click **Insert** > **Quick Parts**, and select *About*.



## Tips

- The paragraphs you add to the Quick Part Gallery can include images, tables, charts, etc.
- If you have many Quick Parts, you can organize them in different categories, for example *Onboarding, Recruiting, Personal*.

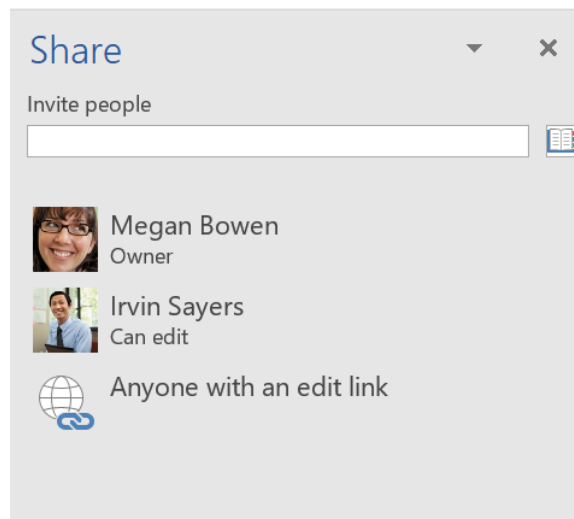
# Work together for better, faster results

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You can't run an HR department with 140-character messages. Often you need to do the hard work of putting ideas, plans and policies into words. You may write job profiles, compensation and benefits plans, describe the company structure or document performance evaluation guidelines. Luckily you don't have to do it alone. With your document saved in the cloud, you can select which colleagues can read, write and review a document.

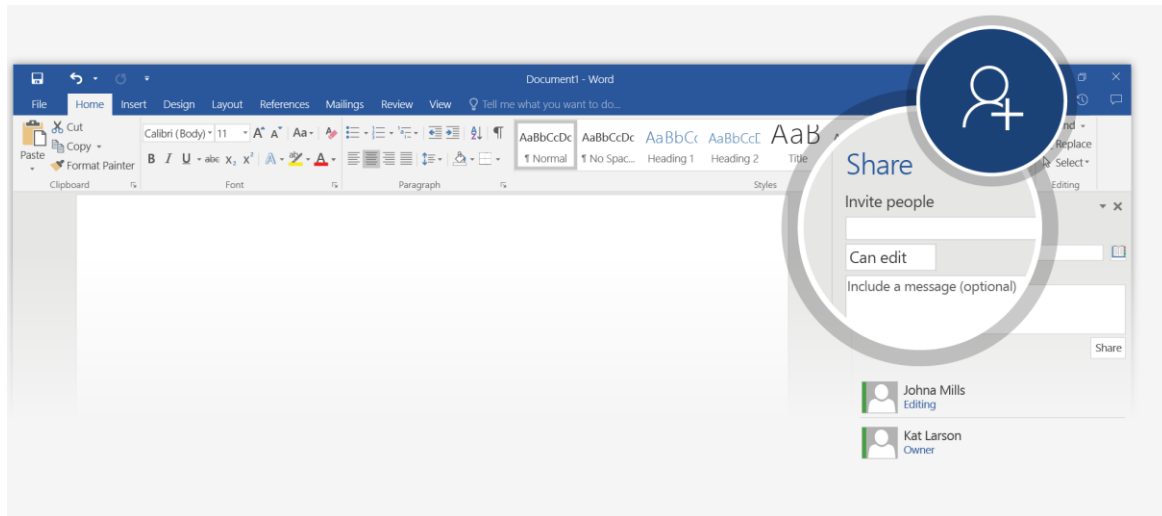
## Share your work in a few clicks

1. In the upper right of the document, click **Share**.
2. **Invite people** so they **can edit** with you. They'll get email with a link to your doc.



3. If this is a brand-new document, you'll see a message "Please choose where you want to upload a copy of your file." Select **OneDrive**. Now enter a name for the document. Click **OK**.
4. You'll see a confirmation that the document is uploaded. Now your colleagues can help you review or write the document.

5. Back in the document, select **Share** in the upper right, and **invite people** so they **can edit** with you. They'll get email with a link to your document.



6. When they follow the link, your doc opens for them in their version of Word, or in Word Online in their web browser.

### Tips

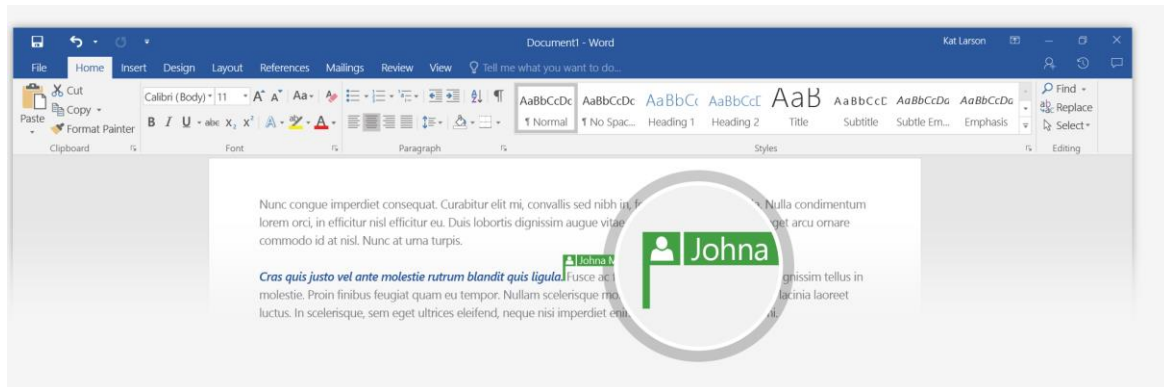
- Sharing works the same in Excel and PowerPoint.
- Your shared document can be found in the "Documents" folder in your OneDrive for Business storage. An easy way to find the document is to click **File** > **Open** > **Recent** and you'll see a chronological list of Word documents you've worked on recently.
- It's also easy to send a link to a document from Outlook. Read more in [Stop hunting for attachments](#).


## Work together in harmony

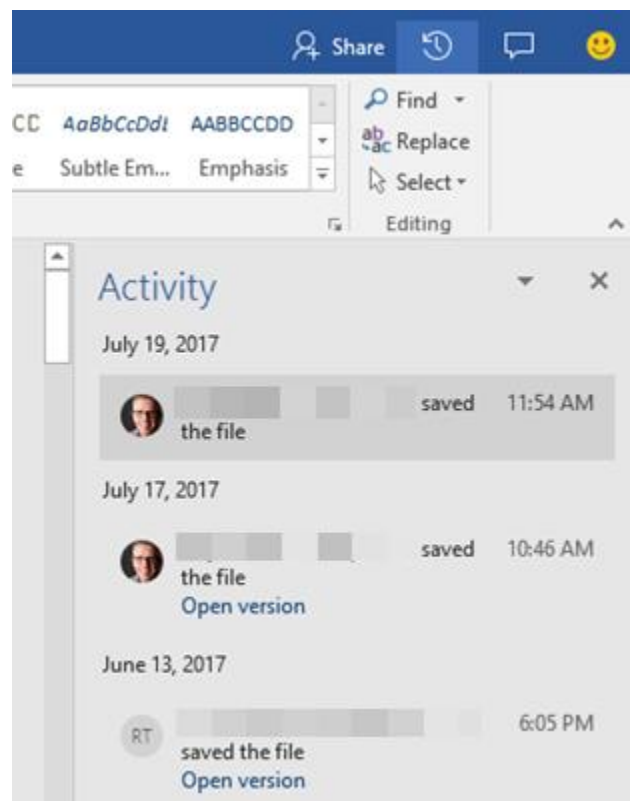
Once you've shared your document with specific colleagues for editing, they can make updates or add comments. You can see who is in the document and what they're working on.



1. If your co-workers are using Word Online or Word 2016 and have agreed to automatically share changes, you'll see each other working in the same document.



2. In order to communicate with your colleagues via Instant Messaging, click on the flag with their name and click **Chat**.
3. If you want to check a previous version of the document, click **Activity**  and find the desired version. Click **Open version**.



# Keep email under control

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Dealing with email messages sometimes takes too much time. Here are some tips to help keep your Inbox lean and free up time for more important things.

## Quickly triage email with keyboard shortcuts

With just three keys, you can start taming the email overload in your Inbox. The Spacebar, Backspace and Delete keys will soon be your best friends.

1. In Outlook, select the email at the top of your Inbox. Next, tap the **spacebar** on your keyboard to scroll through the body of the email.

Now you have 3 choices:

2. When you arrive at the end of the message, press the **spacebar** one more time to go to the next message. The first message stays in your inbox.
3. Press the **Delete** button on your keyboard to delete the message.
4. Press the **Backspace** button on your keyboard to archive the message. Archiving moves the message to a folder named *Archive*. You can easily find the message again later (read more about [finding email messages fast](#)).

## More handy keyboard shortcuts to reply and forward

Wouldn't life be easy if you could just read, delete and archive email messages? Unfortunately, sometimes people expect a reply.

1. Press **CTRL + R** to reply to the sender of the message (or **CTRL + Shift + R** to reply to all). Type your reply.
2. Press **ALT + S** to send your message.

Alternatively, you can forward the message to others.

3. Press **CTRL + F** to forward the message. Type the names of the addressees. Press the **Tab** key until your cursor is positioned in the body of the message. Type your message.
4. Press **ALT + S** to send your reply.

## Tip

Want to quickly start a new email message? Just press **CTRL + N**.

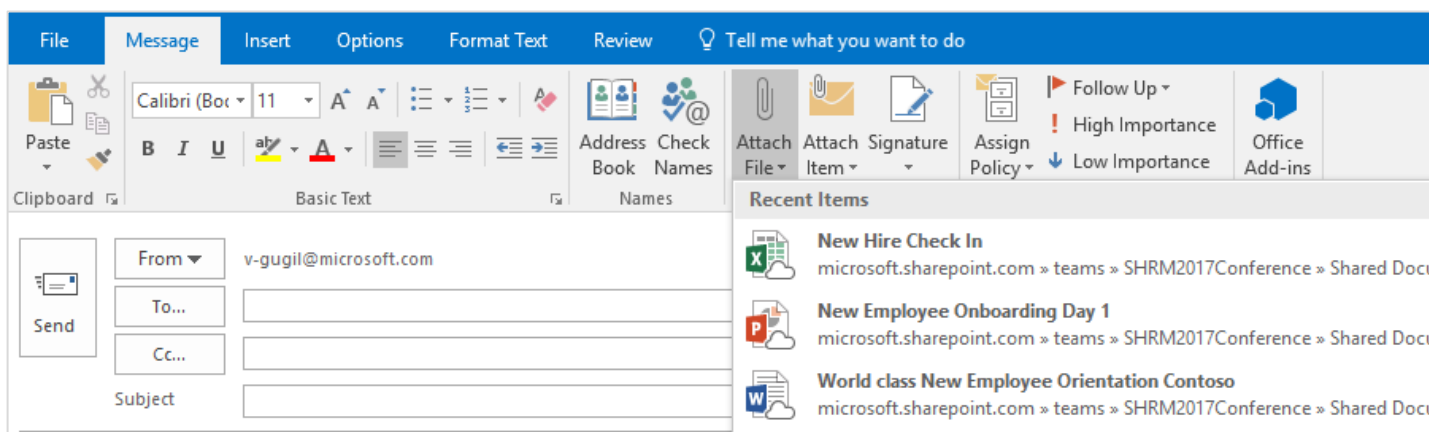
## Stop hunting for attachments

1. Press **CTRL + N** to create a new message. Add the addressees and subject.



2. Click **Attach File**.

3. You'll see a list of recently saved files. Select a file from the list.



4. If the selected file resides in OneDrive or SharePoint, you will see a cloud on the file icon. This means that you will send a link to the file instead of the actual file. This ensures that people will always have the latest version of the attached document.
5. Press **Alt + S** to send the message.

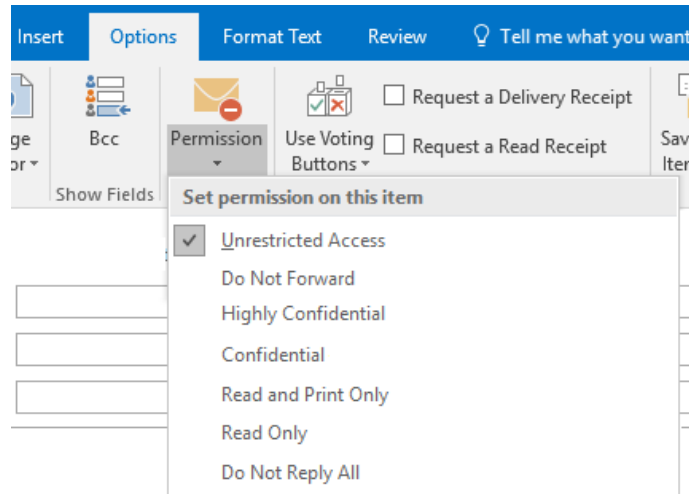
## Keep confidential messages... confidential

As an HR Professional, you often deal with confidential information about employees, the business, or compensation plans. Luckily there are ways to make sure that information stays confidential.

## Note

In order for the following to work, your organization must have Azure RMS activated. Talk to your IT department if you do not see the **Permission** option in Outlook. The IT team may be able to activate Azure RMS if they wish to do so.

1. Press **CTRL + N** to create a new email message. Add addressees and a subject line.
2. On the ribbon, click **Options**, then choose **Permission**.
3. From the dropdown select **Do Not Forward**.



4. Press **Alt + S** to send the email. The receiver of the message will not be able to forward the message to others.

## Find email messages fast

Want to find an email message from 2 months ago? And you don't remember which folder the message is saved in? Do the following:

1. Press **CTRL + E** to position the cursor in the Search box.
2. Type *benefits* to find messages containing the word "benefits"
3. Type *"employee benefits"* (in quotation marks) to find messages containing the phrase "employee benefits"
4. Add *from:John* to find all messages from John.
5. On the ribbon, click **Has Attachments** to only show messages that have attachments.

# Stay connected while away from your desk

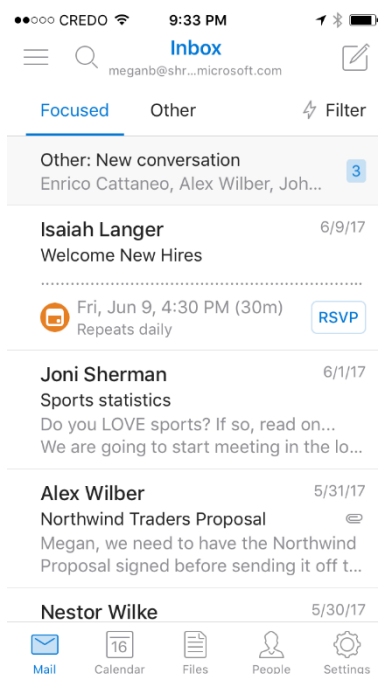
Whether you're walking between meetings, taking public transportation or at a coffee shop, you can stay in the loop and get stuff done on your phone.

## Quickly tackle email on your phone

How do you get rid of email messages if you only have a few minutes and your phone? You swipe!

### Set it up

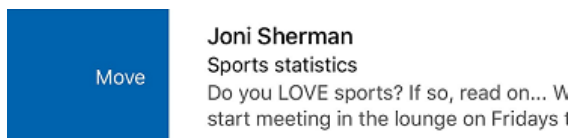
1. Open the **Outlook** app on your iPhone or Android phone.



2. Tap **Settings** > **Swipe Options**.
3. Set **Swipe Right** to *Archive*. Set **Swipe Left** to *Delete*.

### Use it

4. Tap **Mail**. Swipe right on an email message to move the message to the Archive folder.



5. Swipe left on an email message to delete the message.

man  
istics  
VE sports? If so, read on... We are going to  
ing in the lounge on Fridays to go over so...

Monday

Delete



## Tip

Other options for the swipe gestures are:

- **Flag**: to flag a message for follow up.
- **Schedule**: to temporarily remove a message from your inbox and make it reappear at a later scheduled time.
- **Move**: to move a message in a selected folder.


## Send your availability

Do you panic when people ask when you're available to meet, and all you have is your phone? Don't worry, the Outlook app has you covered.

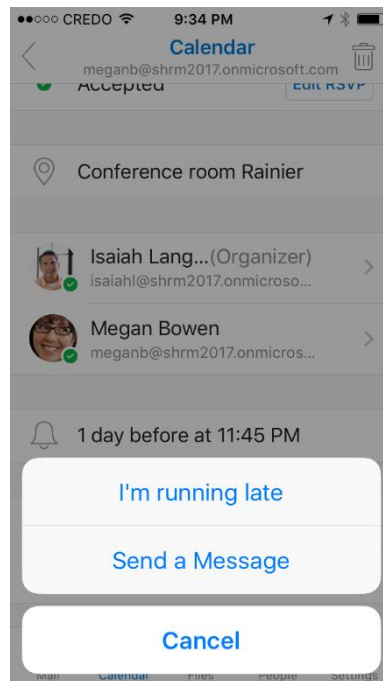
1. Tap the **Pencil**  icon to create a new email message. Add addressees and subject.
2. Tap the **Calendar**  icon at the bottom right of the screen.
3. Tap **Send Availability**.
4. Tap a few different open timeslots in your calendar to select them. You can select timeslots across several days.
5. Tap the **checkmark** in the top right corner.
6. The email message now includes a table with the available time slots.
7. Tap the **arrow** in the top right corner to send the message.

## Running a few minutes late?

Inform your colleagues with just a few taps.

1. In the Outlook app, tap the **Calendar** icon  Calendar.
2. Now tap a meeting.

3. Scroll to the bottom of the meeting invitation and tap **Email Attendees**. Choose if you want to email the meeting organizer or everyone. Then tap **"I'm running late"**.



4. This creates an email message. Tap the **arrow** in the top right corner to send the message.

## Review a PowerPoint presentation on the go

This tip also applies to Word and Excel, but watching a PowerPoint presentation on your phone is much cooler.

### Set it up

1. Install the Microsoft PowerPoint app from the App Store or Google Play store.
2. Open the **PowerPoint** app for the first time.
3. **Sign in** with your Office 365 account, typically your work email address. Next type your password.
4. You're all set. Tap the home button on your phone to close PowerPoint.

### Use it

5. Tap **PowerPoint** on your phone to open it.
6. **Open** a recent presentation.

**7. Swipe left** to review the slides.



# Stay organized with a digital notebook

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With more information coming your way, how do you keep track of it all? And how do you find it again later? A digital notebook helps you capture and organize many types of information.

## Meeting minutes in minutes

Taking and sharing meeting minutes doesn't have to be a hassle. Microsoft OneNote does a lot of the legwork for you.

1. Open **OneNote 2016**.
2. On the right-hand side, click **Add Page**.
3. On the ribbon, click **Meeting Details** and select a meeting from your Outlook Calendar. This automatically adds information like the meeting topic, date, location, participants, and more.
4. Type meeting minutes. They will be saved automatically.
5. Add a checkbox in front of action items by placing the cursor on a line and pressing **CTRL + 1**.
6. When you've finished taking notes, click **Email Page**. This will create an email message with your notes – already addressed to the meeting attendees. Press **Alt + S** to send the email message.

### Tip

You can also initiate meeting notes from your Outlook Calendar. In **Outlook**, open an appointment or meeting. Click **Meeting Notes**. All meeting information will be included in the OneNote page.

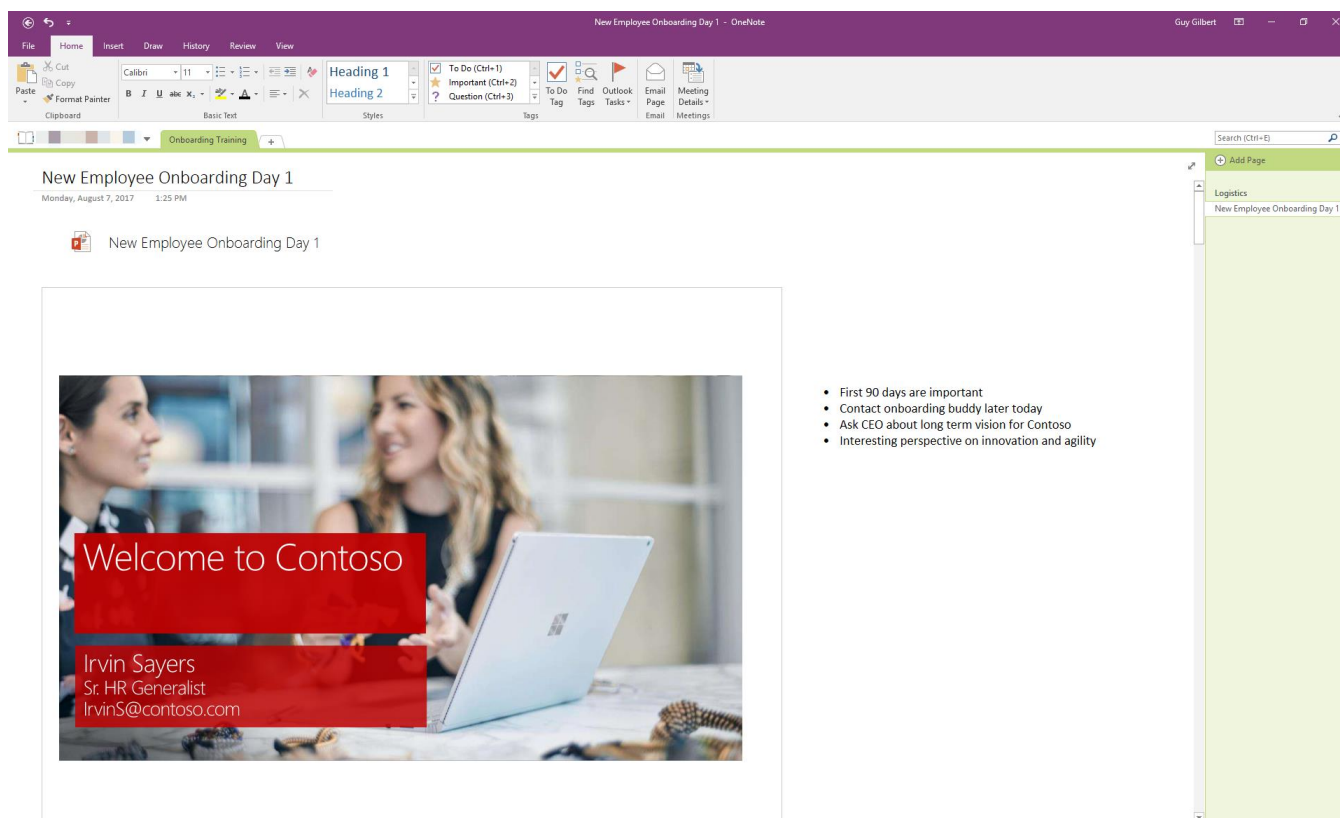
## Study notes for lifelong learners

You don't have to be in Learning & Development to realize the value of good notes. OneNote is a great tool to capture notes during trainings or conferences. It also lets you annotate training materials and record audio while you're taking notes.

### Take notes next to a PowerPoint presentation

Many employee trainings or conference sessions make supporting materials available on beforehand. OneNote lets you annotate those materials.

1. On the ribbon, click **Insert** > **File Printout**. Now choose a PowerPoint file from your computer. Click **OK**.
2. The slides of the presentation will be printed on the OneNote page.
3. Click anywhere next to the slides and type your notes and comments.




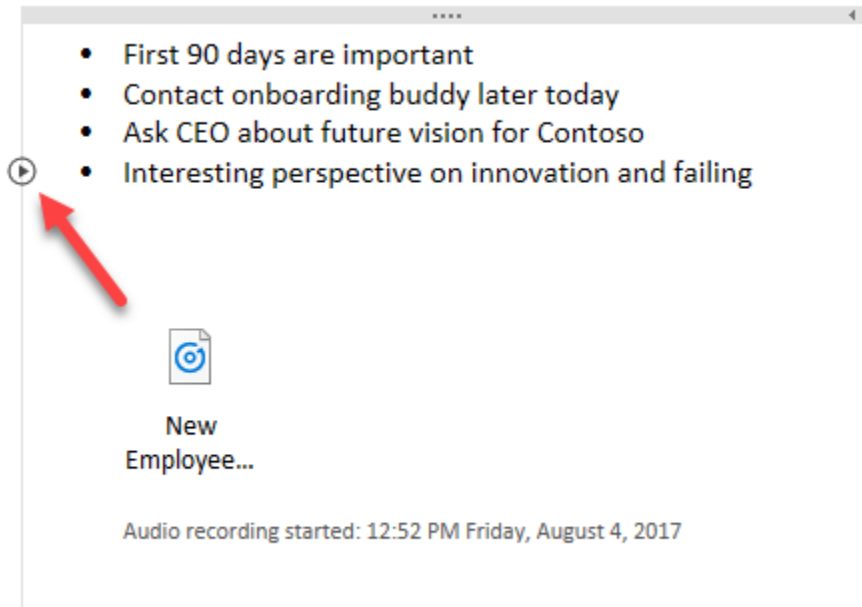
## Tip

When you insert a document in a OneNote page, the content of the document will be indexed so that you can easily find the document later by searching for keywords.

## Record audio and keep it with your notes

1. On the ribbon, click **Insert** > **Record Audio**. OneNote will start recording audio through your computers microphone.
2. While recording, type some notes. Press **Enter** so that your notes are spread out over a couple of lines.
3. In Record, click **Stop**.
4. In Playback, click **Play**. You'll hear the audio you recorded.

5. Hover with your cursor over the lines you typed. You'll see a tiny Play icon to the left of the lines. Now **click on one of the Play icons** , and the audio will jump to what was recorded while you were typing that note.



## Clip Web content

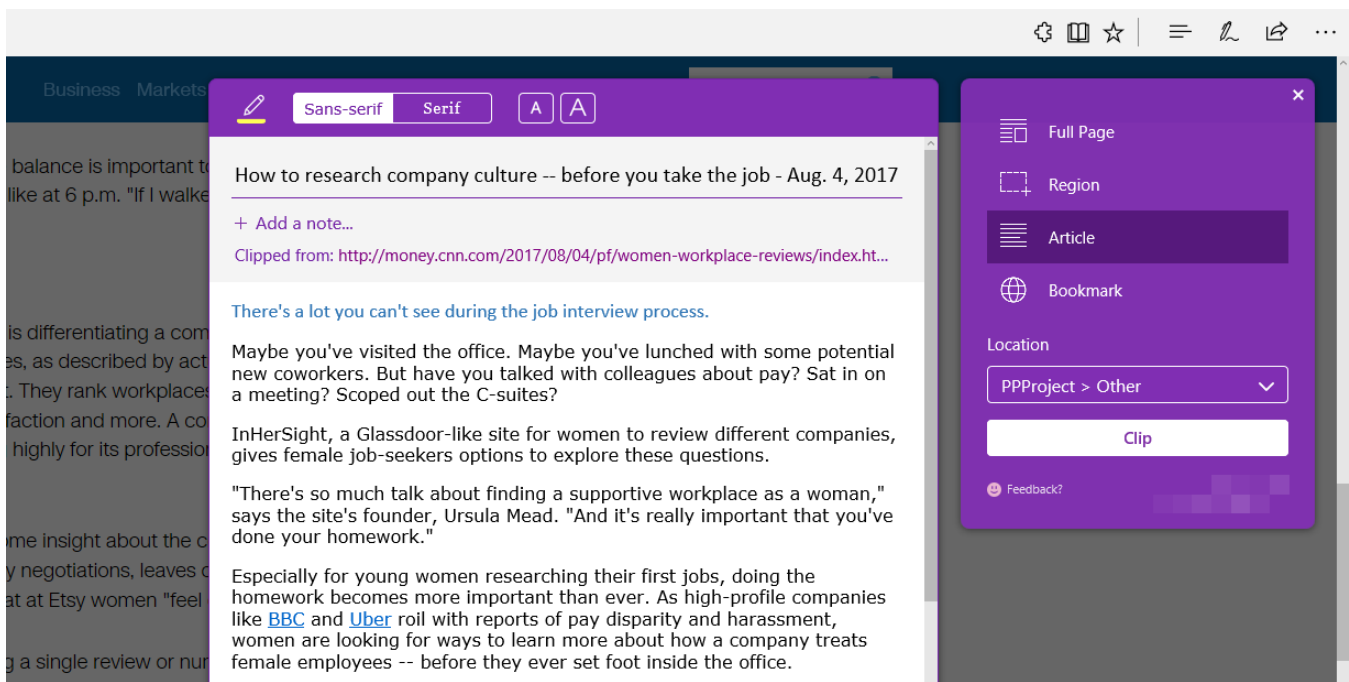
Whether you're researching a topic, or you see an interesting article on the Web, OneNote is the perfect place to collect that information for later. Here's how you can quickly get content from your browser in OneNote.

### Set it up

1. Browse to [www.onenote.com/clipper](http://www.onenote.com/clipper).
2. Click the button **Get OneNote Web Clipper**. Follow the instructions.
3. **Sign In** with your Microsoft Office 365 account.

### Use it

4. In your Web browser, go to [www.cnn.com](http://www.cnn.com). Now click on a news article.
5. Click on the OneNote Web Clipper in your browser toolbar.
6. Click **Article**. Select the OneNote notebook and section you want to collect this in. Click **OK**.



7. OneNote saves the content in an easy to read layout with a link pointing to the original Webpage.

### Tip

The OneNote Web Clipper offers additional options for special content. For example, clipping a PDF will save a printout of the PDF document to OneNote. Clipping a YouTube video will create a OneNote page with a playable video.

# Streamline new employee onboarding

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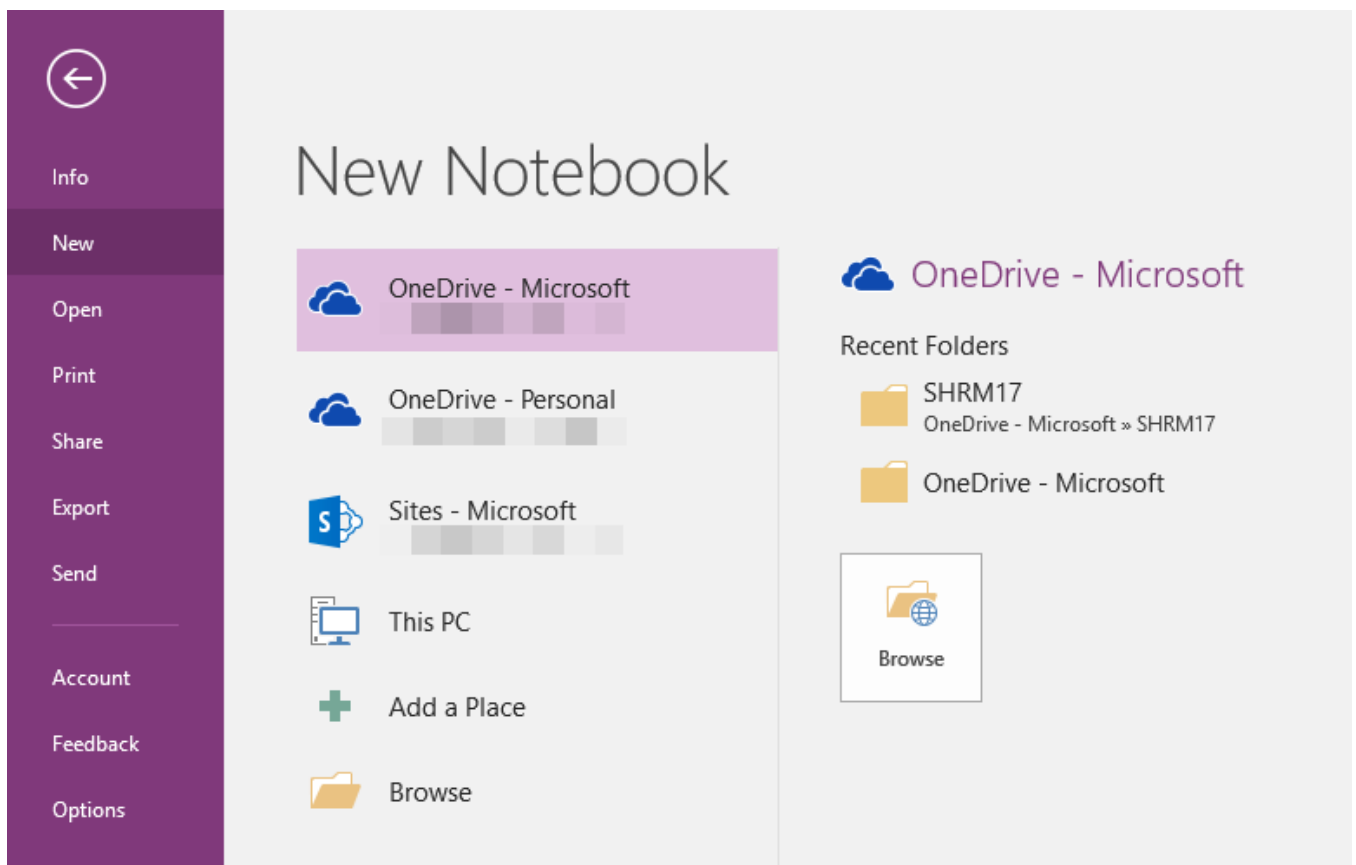
When a new employee joins the organization, you often need to provide vast amounts of information and documents as part of onboarding. This can be a hefty administrative effort. Good news! You can streamline onboarding with a shared Microsoft OneNote notebook.

New employees can access the onboarding notebook from their computers, tablets, and phones, and can learn at their own pace. And they can search for information easily by using keywords and tags.

## Create the onboarding notebook

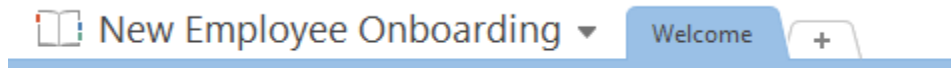
It's easy to create a shared notebook together with the hiring team. And you can instantly modify or add information as job requirements change.


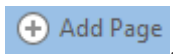
1. Open OneNote. On the ribbon, click **File** > **New**.
2. Create the notebook on OneDrive for Business or SharePoint Online. Select *OneDrive* – or *Sites* –, followed by your organization's name.

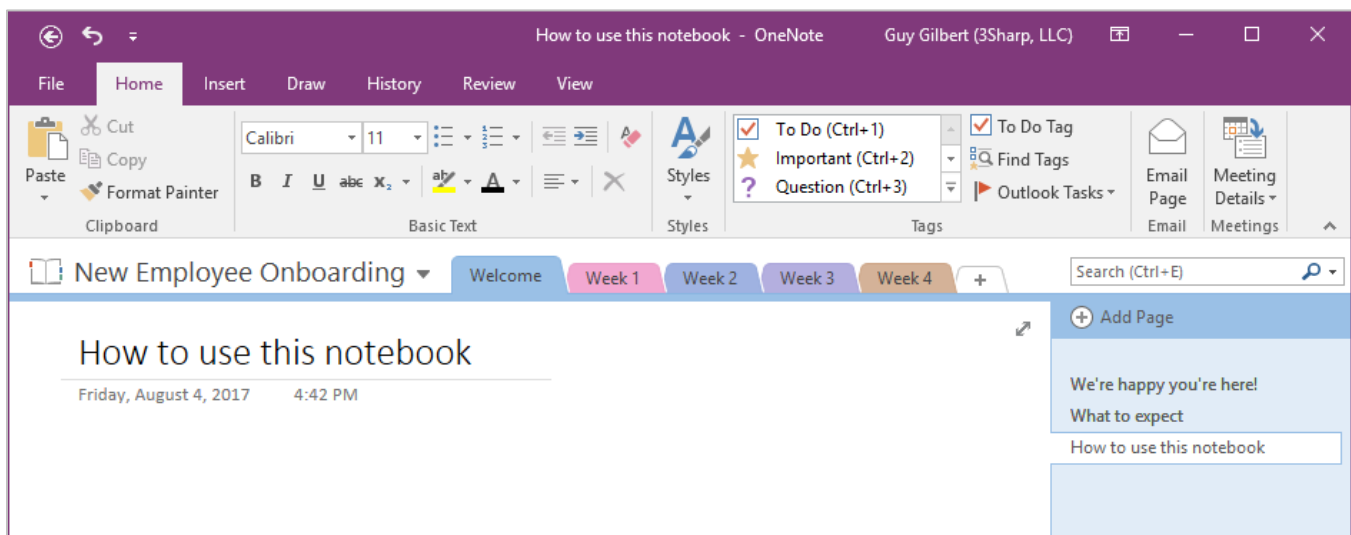


3. Type the notebook name *New Employee Onboarding*. Click **Create**.

- At this point, choose not to share the notebook with others. You'll do this later, after you've created the initial structure.
- You can create a structure by using sections. **Double-click** on the section tab named "New Section 1" and change the name to "*Welcome*".



- Click the **+ sign**  to the right of the Welcome tab to add more sections. You could add 4 tabs named *Week 1*, *Week 2*, *Week 3*, and *Week 4*. The sections will depend on your onboarding program.
- Add pages to the sections. Click on the Welcome section tab. Position your cursor in the heading of the page and type *We're happy you're here!*
- Click **+ Add Page** . Type *What to expect*. Click **+ Add Page**. Type *How to use this notebook*.



## Add content to the onboarding notebook

Of course, you can type to add content to the pages of the onboarding notebook. But you can also copy and paste information from many sources, like the Internet and intranet, email, and Office files. Additionally, you can add handwritten notes, drawn diagrams, embed audio, video, and pictures.

- Open your Web browser and browse to a Website, for example [www.hrbartender.com](http://www.hrbartender.com). Select a block of text from the homepage and press **CTRL + C** to copy the selected content.

2. In OneNote, click **+ Add Page**. Now press **CTRL + V** to paste the content on the page. You'll see that OneNote added a hyperlink at the bottom of the page pointing to the original location.
3. In OneNote, click **+ Add Page**. On the ribbon, click **Insert > Online Video**. Add the URL of a YouTube or Vimeo video, for example <https://www.youtube.com/watch?v=x1YBhCSsEEA>. Click **OK**.
4. You can also attach relevant Word, Excel, PowerPoint, PDF or other files to a page. On the ribbon, choose **Insert > File Attachment**, and select a file. Select **Attach File**.
5. Feel free to experiment with other types of content from the Insert menu.
6. In order to make it easier for new employees to identify and find types of content, you can add tags to pages or paragraphs. Place the cursor on the line of text you want to tag. On the ribbon, click **Home**. In the **Tags** group, click the tag symbol you want to apply. Use the arrows to scroll through the list or click the More arrow to show all available tags.

#### Tip

It's easy to create a custom set of tags relevant for your organization or onboarding process. In the Tags Group, click the **More arrow** and select **Customize Tags** from the bottom of the list. Click **New Tag...** and choose the name and icon for the new tag.

## Collaborate on the onboarding notebook

After creating the draft notebook, it's time to share it with the hiring team or business owners, so they can add sections and content.

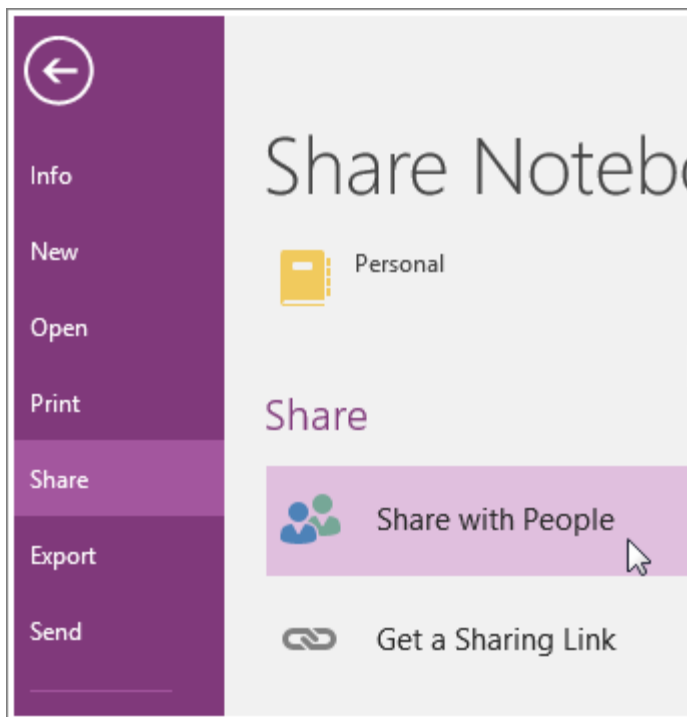
1. On the ribbon, click **File > Share**. **Share with People** will be highlighted.
2. Type the name or email address of people you want to invite. Separate the names or email addresses with a semicolon (";").
3. Ensure that the dropdown field on the right says **Can edit**.
4. Include a personal message explaining to provide the hiring team background information.
5. Click **Share**.
6. The people you shared with will receive an email message with a link to the shared onboarding notebook. They can now contribute to the notebook.

7. When others make changes to the notebook, you can see these changes almost instantly. New or modified pages and sections will have bold titles.
8. You can also filter the most recent changes in the notebook. On the ribbon, click on **History** > **Recent Edits** > **Since Yesterday...** to only see the latest updates.
9. Likewise, you can review changes made by certain people. Click **History** > **Find by Author** to see updates sorted by contributor.

## Share the onboarding notebook with new employees

Once the notebook is ready for primetime, you can start sharing it with new employees. This is similar to sharing with collaborators with one important difference: you'll want to ensure that new employees can view the notebook without editing it.

1. Choose **File** > **Share**.



2. Under **Share with People**, type the names or email addresses of people you'd like to share your notebook with.
3. In the drop-down box on the right, select **Can view**.
4. Add a personal note, if you'd like, and choose **Share**. The new employees you've selected will get an email invitation to open your notebook.



### Tip

If your organization adds new employees to an Office 365 Group or Distribution List (for example, New Employees August 2017), you can use the email address of the Group or Distribution List. This way, you don't have to manually add hundreds of email addresses for every onboarding cycle.

# Analyze and visualize data like a boss

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HR professionals increasingly have access to data about employees. Most HR Information Systems have great reporting tools to get insight in the state of the HR business. But sometimes you want to do your own analysis. Or you may want to track data that's not yet included in systems. Microsoft Excel to the rescue!

## Get data in Excel

There are many ways to get data into Excel. We could write a guide just on that topic alone. For this guide, we'll focus on the most common technique.

### Export data from your HR Information System

1. Most HR Information Systems let you export data as an Excel file or CSV (Comma Separated Values) file. For this exercise, we'll pretend you've exported employee data as a CSV file.
2. Download the CSV file from <https://aka.ms/officehrtipsfiles>. It will automatically be saved in your Downloads folder named `Sample_Employees.csv`.

### Import the data in Excel

1. In Excel, click **File** > **New** > **Blank workbook**. Select cell A1.
2. On the ribbon, click **Data** > **From Text/CSV**.
3. Browse to your Downloads folder and select the *Sample\_Employees.csv* file you saved previously. Click **Import**.
4. You'll see a preview of the data. Click **Load**.
5. In the latest version of Excel, the data will be automatically formatted as a table.

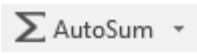
New Hire Check In.xlsx - Excel									
Guy Gilbert (SSharp, LLC)									
CONTROLLER									
ID	Name	Hire Date	Standard Title	Level	Supervisor	Area	Manager	HR Manager	
2	PRARA Prabhu Rao	5/1/2017	DATA ANALYTICS MANAGER	9 N	United States	Lale Oveisi	Olivia Kristiansen		
3	CHAME Chanda Menon	4/15/2017	CONTROLLER	12 N	Saudi Arabia	Amolik Acharya	Akshay Vangara		
4	NEEAG Neelam Agarkar	4/17/2017	GROUP FINANCE MGR	12 Y	India	Kasturi Dutta	Charlotte Johansen		
5	FANGU Fani Gummadi	4/24/2017	IT AUDIT MANAGER	9 N	United States	Anmol Bandopadhyay	Charlotte Johansen		
6	DHAPU Dhanuasha Pullela	4/17/2017	CONTROLLER	12 N	United States	Amolik Acharya	Bhaageerathi Thota		
7	SUMBA Sumana Banerjee	5/1/2017	SR. FINANCE MANAGER, VI	11 N	United States	Anmol Bandopadhyay	Haarika Bhamidipati		
8	JODMA Jodie Marsh	5/2/2017	GROUPTRADE MANAGER	13 N	China	Tara Mitra	Daevani Rajanala		
9	AMBBH Ambaajeeraav Bhogiredd	5/1/2017	SERVICES CONTROLLER	12 N	Netherlands	Gautam Sanyal	Sebastian Christoffersen		
10	DHASA Dhaaruni Samavedam	5/2/2017	SENIOR LICENSING EXECUTIVE	13 Y	France	Anmol Bandopadhyay	Gowri Amaravati		
11	ZOETA Zoe Taylor	5/5/2017	SR DIRECTOR FINANCE FRANCE	16 Y	France	Eekalabya Bandopadhyay	Gowri Amaravati		
12	EESTH Eesvar Thota	5/1/2017	SR. CREDIT MANAGER	10 N	Ireland	Elaheh Sheibani Far	Daevani Rajanala		
13	ARJNA Arjuna Nadar	5/8/2017	CONTROLLER	8 N	Taiwan	Lii Aare	Bhaageerathi Thota		
14	PRIDA Priya Das	5/8/2017	FINANCE MANAGER	10 N	United States	Maksym Olynyk	Dasarad Pakalapati		
15	HANFA Hannah Faulkner	5/5/2017	CREDIT MANAGER - INDIA	11 N	India	Kasturi Dutta	Jeppe Juhl		
16	AKACH Akanksha Chatterjee	5/8/2017	FINANCE MANAGER	10 N	United States	Banshi De	Sebastian Christoffersen		
17	LIUZH Liu Zhang	5/1/2017	CONTROLLER MANAGER	14 Y	Germany	Laboni Bhowmick	Jeppe Juhl		
18	DEESA Deepak Sastry	5/10/2017	SR CONTROLLER	12 Y	Russia	Aninda Thakur	Rebecca Larsen		
19	RATME Ratnam Menon	5/8/2017	SR. FINANCE MANAGER	12 N	United States	Kasturi Dutta	Haarika Bhamidipati		
20	AJISR Ajitaab Sridhara	5/8/2017	CONTROLLER MANAGER	13 Y	Poland	Anindo Bhowmick	Charlotte Johansen		
21	LAXKH Laxmi Khalsa	5/10/2017	CONTROLLER OEM	9 N	Japan	Laboni Bhowmick	Lina Kudryashova		
22	JUNPA Jun-jie Pan	5/1/2017	STATE TAX PLANNING DIRECTOR	15 N	United States	Lale Oveisi	Shakshavali Akkiraju		
23	SHYSI Shyamal Singh	4/24/2017	CONTROLS & COMPLIANCE MANAGER	9 N	Russia	Hemchandra Dey	Sebastian Christoffersen		
24	TARKH Tara Khandke	5/1/2017	GROUP TRADE MANAGER	13 N	United States	Basant Dutta	Shakshavali Akkiraju		
25	RAJMA Rajiv Matondkar	4/17/2017	FINANCE MANAGER	9 N	United States	Aninda Thakur	Hamsanaari Devulapalli		
26	PRAOG Prasad Ogra	5/8/2017	SENIOR LICENSING EXECUTIVE	11 N	Hong Kong SAR	Eekalabya Bandopadhyay	Busarakham Praphasirirat		
27	ELIBE Eline Bekken	4/24/2017	SR PROCUREMENT PM SERVICES	12 N	United States	Gautam Sanyal	Busarakham Praphasirirat		
28	DIVPA Divya Pandit	4/3/2017	Controller Manager	12 N	United Kingdom	Gautam Sanyal	Akshay Vangara		
29	RAVMU Ravindra Mukaddam	3/27/2017	Financial Analysis & Controls	12 N	Netherlands	Charu Malakar	Hamsanaari Devulapalli		

- If the data isn't formatted yet, click on any cell with content. Then click **Format as Table**. Select one of the designs. When your data is formatted as a table, it is much easier to work with the data.

## Making sense of data with filters

A simple way of analyzing a large set of data in Excel is filtering the data based on certain criteria. By using filters. You'll be able to answer questions like "How many employees in the United States have been with the company for more than 5 years?" or "What's the average tenure of employees with a level higher than 50 in our Manufacturing Department?" Here's how:

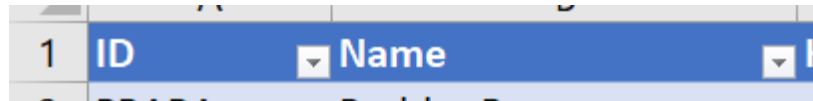
### Count the ways

- Position your cursor in a cell directly under the table you created, for example **B118**.
- On the **Home** ribbon, click **AutoSum** .
- Click the dropdown button and select **Count**. Now you'll see the number of non-empty cells.

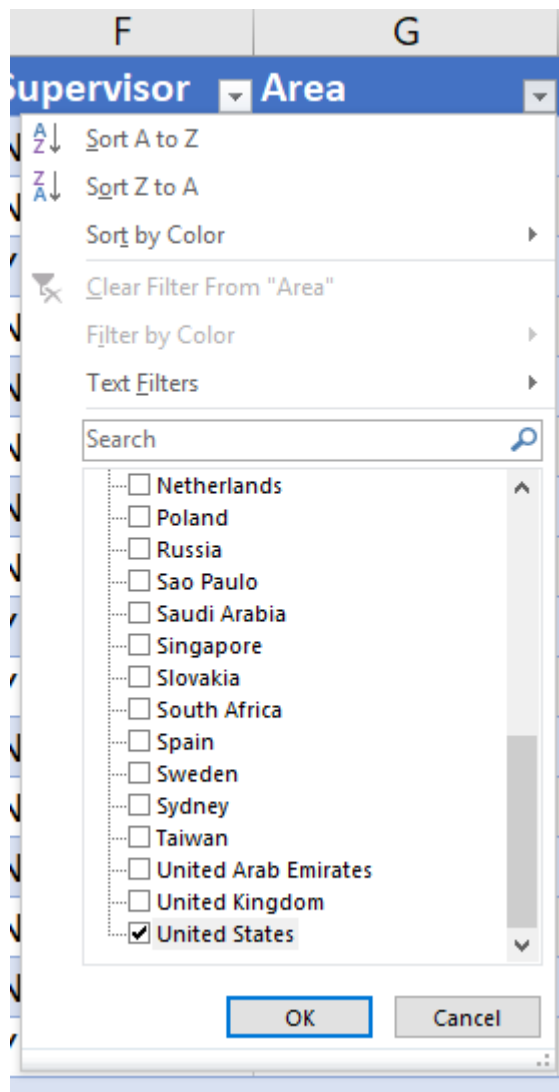
115	OLECH	Oleksiy Chumak	1/16/2017	Business F
116	DILSE	Dilawar Seddigh	1/16/2017	Business F
117	DIVDA	Divya Das	1/31/2017	Accountar
118		116		
119				
120				

## Filter

1. Press **CTRL + Home** to jump to cell A1.
2. Along row 1, you'll see Filter arrows.



3. At the top of Column H (*Area*), click the Filter arrow.
4. Clear the **"Select All" checkbox**, then scroll down and select *"United States"*.



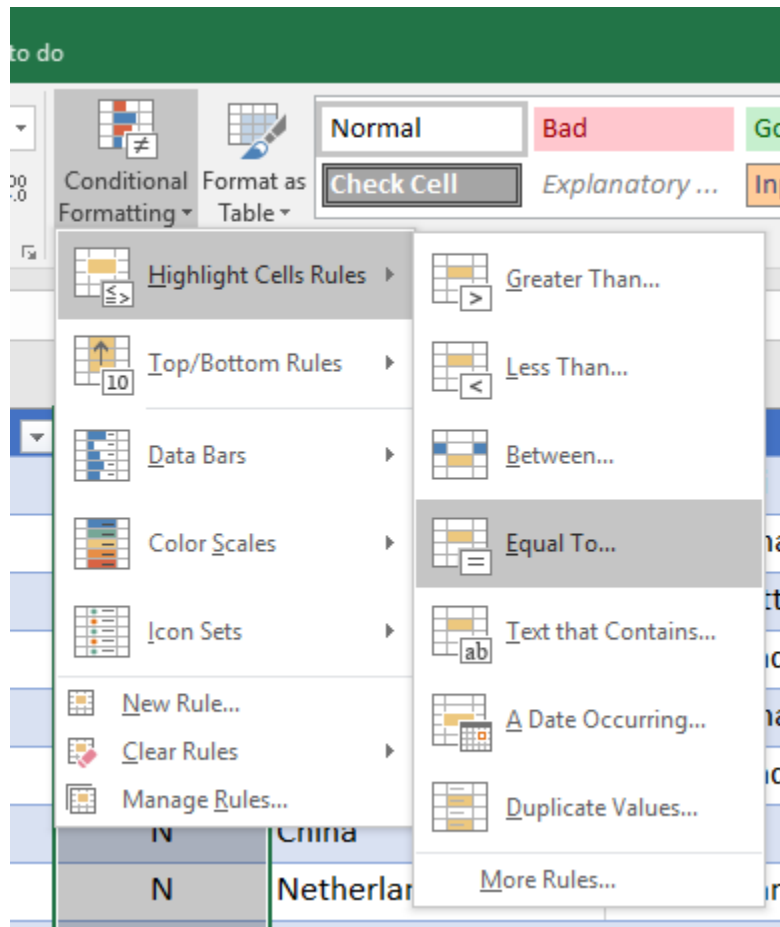
5. Now click the Filter arrow at the top of Column C (*Hire Date*).
6. Click the **"2017" checkbox** to uncheck it.
7. You now have the list of employees in the United States who joined the company before 2017.
8. Remove the filter by clicking **Data > Clear Filter**.
9. Try some other filters and see the results.

## Making sense of data with colors

If you're a visual person, Excel has a useful way of applying colors or icons to your data, so that you and others can see trends at a glance. Conditional formatting allows you to apply colors to cells based on certain conditions. For example, you can apply a bright yellow color to job candidates that move to

the next interview round. Or apply a color scale - from red to green - to employee poll scores ranging from poor to excellent. Conditional formatting is dynamic, so as your values change, the formatting will automatically adjust.

1. Switch to the *90 Day Checkpoint* Sheet.
2. Click to highlight column F (*Supervisor*).
3. On the ribbon, select **Home** > **Conditional Formatting** > **Highlight Cell Rules**.



4. Select **Equal To**. Enter "Y" (without the quotation marks). Select *Yellow Fill with Dark Yellow Text*. Click **OK**.



5. All cells with Y will now stand out with a bright yellow color. You can see at a glance who is a manager.

	A	B	C	D	E	F	G
1	ID	Name	Hire Date	Title	Level	Supervisor	Area
2	PRARA	Prabhu Rao	5/1/2017	DATA ANALYTICS MANAGER	9	N	United States
3	CHAME	Chanda Menon	4/15/2017	CONTROLLER	12	N	Saudi Arabia
4	NEEAG	Neelam Agarkar	4/17/2017	GROUP FINANCE MGR	12	Y	India
5	FANGU	Fani Gummadi	4/24/2017	IT AUDIT MANAGER	9	N	United States
6	DHAPU	Dhanuasha Pullela	4/17/2017	CONTROLLER	12	N	United States
7	SUMBA	Sumana Banerjee	5/1/2017	SR. FINANCE MANAGER, VI	11	N	United States
8	JODMA	Jodie Marsh	5/2/2017	GROUPTRADE MANAGER	13	N	China
9	AMBBH	Ambaajeeraav Bhogireddy	5/1/2017	SERVICES CONTROLLER	12	N	Netherlands
10	DHASA	Dhaaruni Samavedam	5/2/2017	SENIOR LICENSING EXECUTIVE	13	Y	France
11	ZOETA	Zoe Taylor	5/5/2017	SR DIRECTOR FINANCE FRANCE	16	Y	France
12	EESTH	Eesvar Thota	5/1/2017	SR. CREDIT MANAGER	10	N	Ireland
13	ARJNA	Arjuna Nadar	5/8/2017	CONTROLLER	8	N	Taiwan
14	PRIDA	Priya Das	5/8/2017	FINANCE MANAGER	10	N	United States
15	HANFA	Hannah Faulkner	5/5/2017	CREDIT MANAGER - INDIA	11	N	India
16	AKACH	Akanksha Chatterjee	5/8/2017	FINANCE MANAGER	10	N	United States
17	LIUZH	Liu Zhang	5/1/2017	CONTROLLER MANAGER	14	Y	Germany
18	DEESA	Deepak Sastry	5/10/2017	SR CONTROLLER	12	Y	Russia
19	RATME	Ratnam Menon	5/8/2017	SR. FINANCE MANAGER	12	N	United States
20	AJISR	Ajitaab Sridhara	5/8/2017	CONTROLLER MANAGER	13	Y	Poland
21	LAXKH	Laxmi Khalsa	5/10/2017	CONTROLLER OEM	9	N	Japan
22	JUNPA	Jun-jie Pan	5/1/2017	STATE TAX PLANNING DIRECTOR	15	N	United States
23	SHYSI	Shyamal Singh	4/24/2017	CONTROLS & COMPLIANCE MANAGER	9	N	Russia

6. Now, click to highlight column E (*Level*).
7. On the ribbon, select **Home** > **Conditional Formatting** > **Color Scales**.
8. Hover over the color scales on the left-hand side. The color of the cells in column E will change. Click on one of the color scale thumbnails to select it.
9. Now you can easily distinguish different levels.

	A	B	C	D	E	F	G
1	ID	Name	Hire Date	Title	Level	Supervisor	Area
2	PRARA	Prabhu Rao	5/1/2017	DATA ANALYTICS MANAGER	9	N	United States
3	CHAME	Chanda Menon	4/15/2017	CONTROLLER	12	N	Saudi Arabia
4	NEEAG	Neelam Agarkar	4/17/2017	GROUP FINANCE MGR	12	Y	India
5	FANGU	Fani Gummadi	4/24/2017	IT AUDIT MANAGER	9	N	United States
6	DHAPU	Dhanuasha Pullela	4/17/2017	CONTROLLER	12	N	United States
7	SUMBA	Sumana Banerjee	5/1/2017	SR. FINANCE MANAGER, VI	11	N	United States
8	JODMA	Jodie Marsh	5/2/2017	GROUPTRADE MANAGER	13	N	China
9	AMBBH	Ambaajeeraav Bhogireddy	5/1/2017	SERVICES CONTROLLER	12	N	Netherlands
10	DHASA	Dhaaruni Samavedam	5/2/2017	SENIOR LICENSING EXECUTIVE	13	Y	France
11	ZOETA	Zoe Taylor	5/5/2017	SR DIRECTOR FINANCE FRANCE	16	Y	France
12	EESTH	Eesvar Thota	5/1/2017	SR. CREDIT MANAGER	10	N	Ireland
13	ARJNA	Arjuna Nadar	5/8/2017	CONTROLLER	8	N	Taiwan
14	PRIDA	Priya Das	5/8/2017	FINANCE MANAGER	10	N	United States
15	HANFA	Hannah Faulkner	5/5/2017	CREDIT MANAGER - INDIA	11	N	India
16	AKACH	Akanksha Chatterjee	5/8/2017	FINANCE MANAGER	10	N	United States
17	LIUZH	Liu Zhang	5/1/2017	CONTROLLER MANAGER	14	Y	Germany
18	DEESA	Deepak Sastry	5/10/2017	SR CONTROLLER	12	Y	Russia
19	RATME	Ratnam Menon	5/8/2017	SR. FINANCE MANAGER	12	N	United States
20	AJISR	Ajitaab Sridhara	5/8/2017	CONTROLLER MANAGER	13	Y	Poland
21	LAXKH	Laxmi Khalsa	5/10/2017	CONTROLLER OEM	9	N	Japan
22	JUNPA	Jun-jie Pan	5/1/2017	STATE TAX PLANNING DIRECTOR	15	N	United States
23	SHYSI	Shyamal Singh	4/24/2017	CONTROLS & COMPLIANCE MANAGER	9	N	Russia

## Adding thousands of rows of data with a few keystrokes

When you export data out of HR information systems, it often includes text data types like employee names (Angela Padilla), city names (Redmond) and state abbreviations (WA). Too often, that data is not exactly in the format you want. For example, you may want to use just the last name, or to combine the city and state. With Flash Fill, you can automatically extract and combine data across multiple columns. Let's look at this magical feature.

1. Position cursor in cell J1, to the right of the table.
2. Type *Last Name*. Press **Enter**. A column will be added to the table.
3. In cell J2, type the last name of the employee (or manager or HR manager), for example *Kristiansen*. In cell J3, type *Vangara*.



I	J
HR Manager	Last Name
Olivia Kristiansen	Kristiansen
Akshay Vangara	Vangara
Charlotte Johansen	Johansen
Charlotte Johansen	Johansen
Bhaageerathi Thota	Thota
Haarika Bhamidipati	Bhamidipati
Daevani Rajanala	Rajanala
Sebastian Christoffersen	Christoffersen
Gowri Amaravati	Amaravati
Gowri Amaravati	Amaravati

4. Excel will begin to automatically fill data in cells from the pattern it discovered. In gray, the other last names are appearing down column J.
5. Press **Enter** and the entire column will be filled.

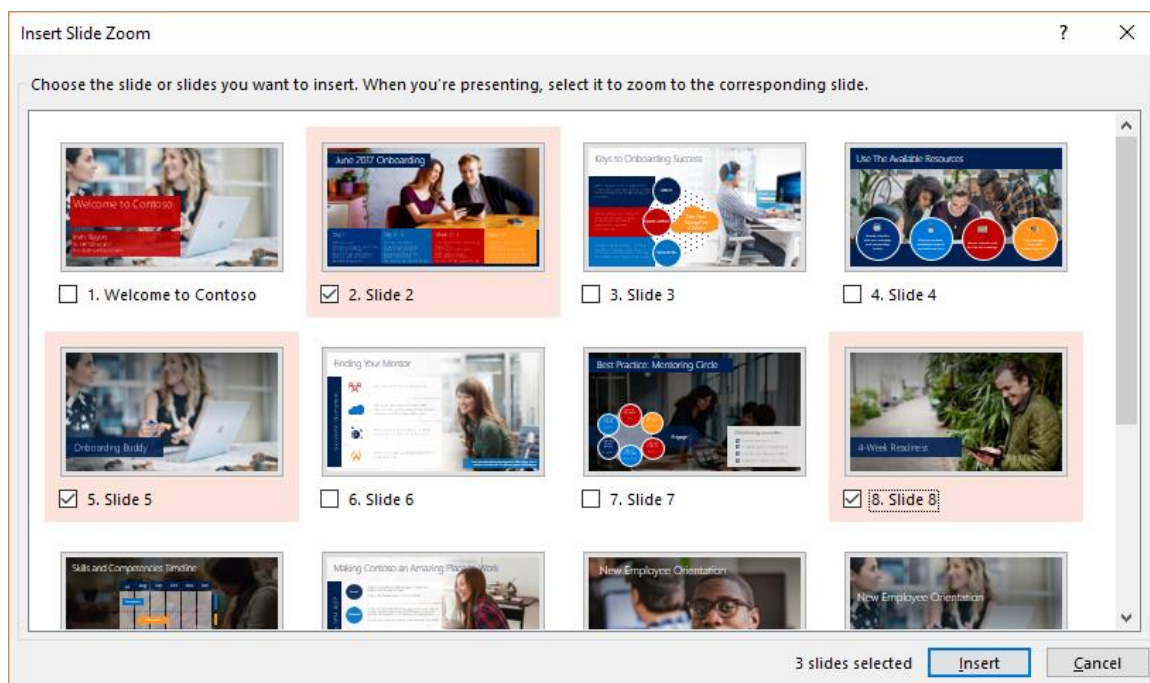
# Make your presentations stand out

Employees get bombarded with information every day. It's not easy to break through the noise and make your messages stand out. With these PowerPoint tips, you'll be able to get people's attention and get your point across more effectively.

## Take people on a journey through your story

When you have a long or complicated story to tell, your audience sometimes loses track. The new Zoom feature in PowerPoint guides the audience through the different sections of your presentation, and makes your presentations more dynamic and exciting.

1. In **PowerPoint**, open a presentation with more than 10 slides.
2. Position your cursor between thumbnails of slide 1 and 2 on the left-hand side.
3. On the ribbon, click **Insert** > **Zoom** > **Summary Zoom**.
4. Select a few slides that mark the beginning of different sections.
5. Click **Insert**.



6. A new summary slide will appear with thumbnails of the section slides.



7. On the ribbon, click **Slide Show > From Beginning**. As you move through the presentation, you'll zoom in and out of sections.
8. You can also click on a slide thumbnail in the summary slide to jump to a particular section.

## Become a designer overnight

PowerPoint Designer improves your slides by automatically generating design ideas that you can choose from. PowerPoint Designer makes it easy to create a beautiful slide with just one click.

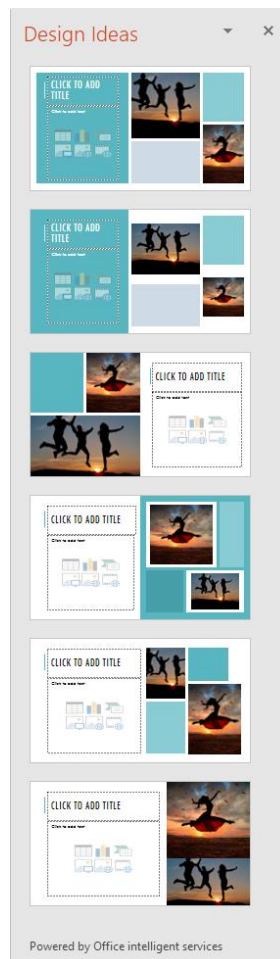
### Design ideas for pictures and charts

1. Click **File > New**, and select one of the presentation templates, for example *Integral*. Click **Create**.
2. Click **Home > New Slide**.
3. Use **Insert > Online Pictures** to add one, two or three images to the slide (You could also use **Insert > Pictures** or **Insert > Charts**).

CLICK TO ADD TITLE



4. The first time you use Designer, a message will appear asking your permission to get design ideas for you. If you want to use Designer, select **Turn on**.
5. Designer opens a task pane for you with a wide range of suggestions. **Select a thumbnail** to apply that design idea to your slide.



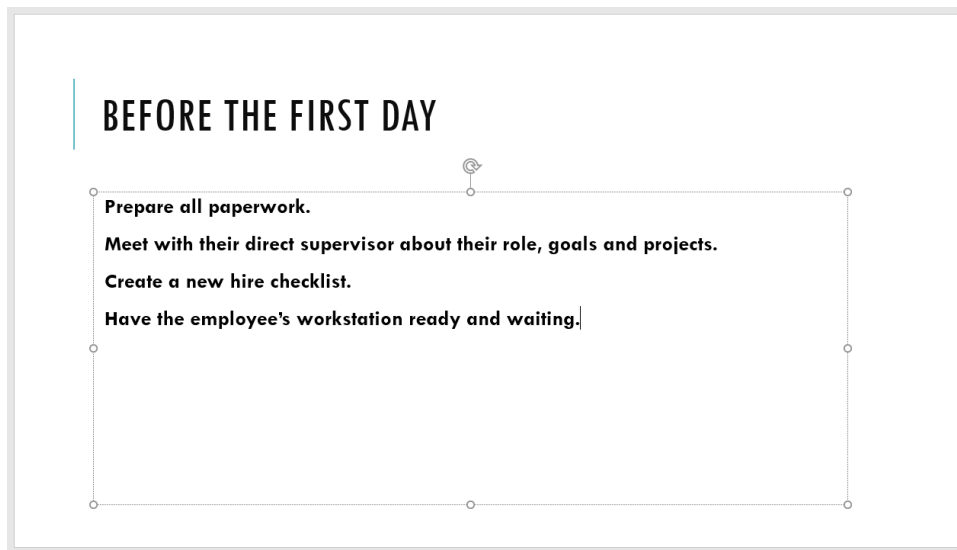
## Tip

You can open Designer any time by going to **Design > Design Ideas**.

### Design ideas for bulleted lists

PowerPoint Designer notices when you write a bulleted list of "steps" on a slide, or a list of statements in which each one begins with a verb. In either case, Designer reacts by offering to turn your list into a SmartArt graphic.

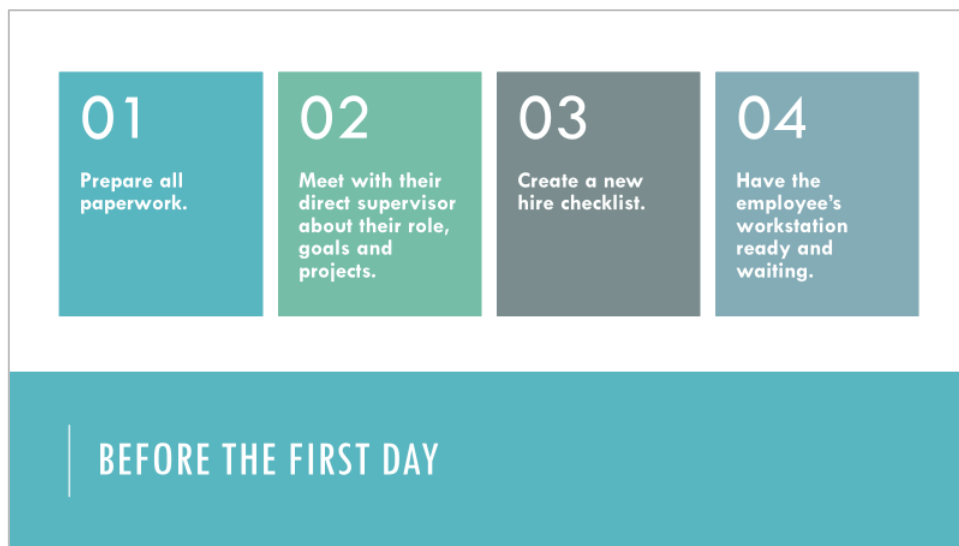
1. Click Home > New Slide
2. Type your sequential or action-oriented list of items.



3. The Design Ideas pane opens and shows several graphical depictions for you to choose from.



4. **Click a thumbnail** to select the one you want, and your text is changed to a SmartArt graphic that you can continue to edit.



5. If you want to revert to your original text-based list, select the entire SmartArt graphic, **right-click** it, and select **Convert to Text**.

# Make online trainings and webinars engaging

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It's become easier than ever to provide employees with expert trainers and outstanding content without the need to get all employees in the same room. Next time you organize a leadership training or have a companywide communication, why not make it a webinar. Here are some guidelines on how to make an online training engaging for remote attendees.


## It's all in the preparation

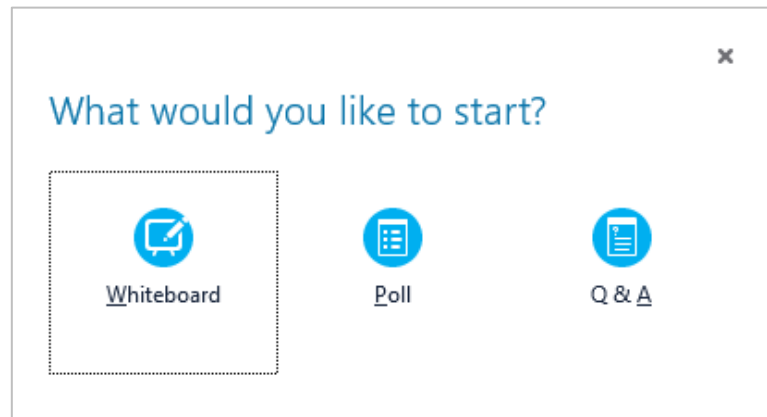
### Schedule the training

1. In Outlook, click **New Items > New Meeting**.
2. Add attendees on the To Line, a meeting subject, and a start and end time. On the ribbon click **Meeting > Skype Meeting**. The Skype meeting details will be included in the meeting request body.
3. Click **Send**. The meeting attendees will receive your meeting request via email.

### Prepare for the training

As you prepare for the training, you'll want to think beyond the talking points and PowerPoint presentation. You can make the training more interactive and quiz attendees by using Polls. And you want to be prepared to answer people's questions without disrupting the training.

1. Prior to the start of the meeting, open the meeting request on your Outlook Calendar and click the link *Join Skype Meeting*.
2. Click **Share Content**  **> Share PowerPoint files**. Select a PowerPoint file from your computer and click **Open**. The PowerPoint presentation will be uploaded and shared.
3. To make training materials available for download, click **Share Content > Add Attachments...** Select one or more files from your computer and click **Open**.
4. Polls are great tools to involve meeting participants, get their opinion, or wake them up. To create polls for use during the online meeting or training, click **Share Content > More... > Poll**.



5. Give the poll a name, type a poll question, and add up to 7 choices. Click **Create**. You'll see a preview of the poll on screen. Select **Poll Actions** > **Poll results are shown to everyone**. If you want to prepare additional polls, you can repeat this process.

A "Create a Poll" dialog box with a close button (X) in the top right corner. It contains the following fields:

- Poll name:** A text input field containing "5. Useful".
- Question:** A text input field containing "What part of the training was most useful?".
- Choices:** A list of seven items, each with a colored square icon and a text input field:
  - Blue square: "Meet the CEO"
  - Green square: "Interview a customer"
  - Blue square: "Leadership advice from renowned coaches"
  - Purple square: "Measuring manager effectiveness"
  - Yellow square: "Diversity and Inclusion"
  - Red square: (empty field)
  - Brown square: (empty field)

At the bottom right are two buttons: "Create" and "Cancel".

6. Click **Share Content** > **More...** > **Q&A**. This will create a Q&A session where meeting participants can type questions for presenters to answer. For now, click **Stop Q&A**.



Welcome to Q & A.

Meeting IM is off. Turn it back on anytime.

Tip: Attendees can only ask questions. Make everyone an attendee so that you're the only one who can answer.

Ask a question.  
As soon as a presenter answers it, everyone will see it.

Save as... Stop Q & A

7. Now, everything is ready for the online training. You can **close Skype for Business**.

## Showtime! Have an amazing online training

### Start and present

1. In Outlook, open the meeting request on your Calendar and **click the link *Join Skype Meeting***.
2. Select *Use Skype for Business (full Audio and Video experience)* and click **OK**.
3. Click **Share Content > Manage Content**. Find the PowerPoint presentation you want to use



and click **Start sharing this content**.


4. If you want attendees to line up questions for presenters, then activate Q&A by finding the Q&A content in the list and click **Start sharing this content**. Then switch to the presentation

by **clicking on the Presentation tab**



5. When attendees have joined, you can start the online meeting. Move the presentation forward by clicking on the slides or the slide arrows.


## Annotate

1. Use the annotation tools to draw attention to certain points or to keep people engaged. **Click the pen symbol**  at the top right of the slide, and select one of the tools: a laser pointer, pen, highlighter, stamp, and more.



2. When you're done with a tool, **click the "X"** under the Annotation Tool icon .

### Tip

Use the Stamp tool  to check off points on the slide as you handle them. People will pay attention and see where you are.

## Poll your audience

1. When you're ready to poll the participants, click **Share Content > Manage Content**. Find the poll you want to use and click **Start sharing this content**.
2. Attendees will now see the poll and can select an answer. You'll see poll results on the screen. When you have enough responses, you can close the poll by clicking **Poll Actions > Poll is closed**. Since everyone can see a summary of the poll results, you have an opportunity to discuss the results.
3. When you want to return to the presentation, click **Share Content > Manage Content** and click **Start sharing this content** for your presentation. The presentation will return to the slide where you last left off.

4. At one point, you or a co-presenter might want to answer questions from participants. **Click on the Q&A tab** and select an unanswered question. Click on **Answer** and type your response. Once you press **Enter**, your answer will be visible to everyone.

ALL | UNANSWERED (2)

12:55:37 PM

What are best practices for retaining high performing employees?

There's an outstanding document on the Contoso HR intranet. See [More](#)

12:56:51 PM

How do we ensure we include introverted employees in meetings?

[Answer](#)

12:57:20 PM

How do I get access to the training materials?

[Answer](#)

Ask a question.  
As soon as a presenter answers it, everyone will see it.

[Save as...](#) [Stop Q & A](#)

#### Tips:

- You could prepare your answer in Word or OneNote and then copy it in Skype for Business.
- If you want to redo an answer, **click the X to the right of the answer**.

#### 5. Return to the presentation tab.

Congratulations! You had a successful, engaging online training.

#### Tip

You can record an online training or meeting in Skype for Business for later consumption. Click **More Options** > **Start Recording**. It is a good practice to inform people that the call is being recorded.

# Next steps

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We hope you discovered new ways of using Microsoft Office 365 that will save you time every day. Time you can use to make your organization an amazing place to work.

Please share this e-book with colleagues who can benefit from these time-saving tips. They can download it at <http://aka.ms/officeHRTips>.

Are you interested in learning more?

1. You'll find many more tips, videos and how-to guides for HR professionals in the [Office 365 Productivity Library](#).
2. If you enjoyed this guide and you're excited about technology and productivity, you should probably [join our Microsoft Office 365 Champion Program](#). You'll have access to exclusive Office resources and connect with a community of like-minded professionals.

Finally, we would love to get your feedback and ideas. Are you looking for other tips? Do you have any suggestions? Please send an email to [officeHRTips@microsoft.com](mailto:officeHRTips@microsoft.com).

Thank you,

Sanjeevini Mittal  
Group Manager Office 365  
Microsoft Corporation