

Tips and Tricks

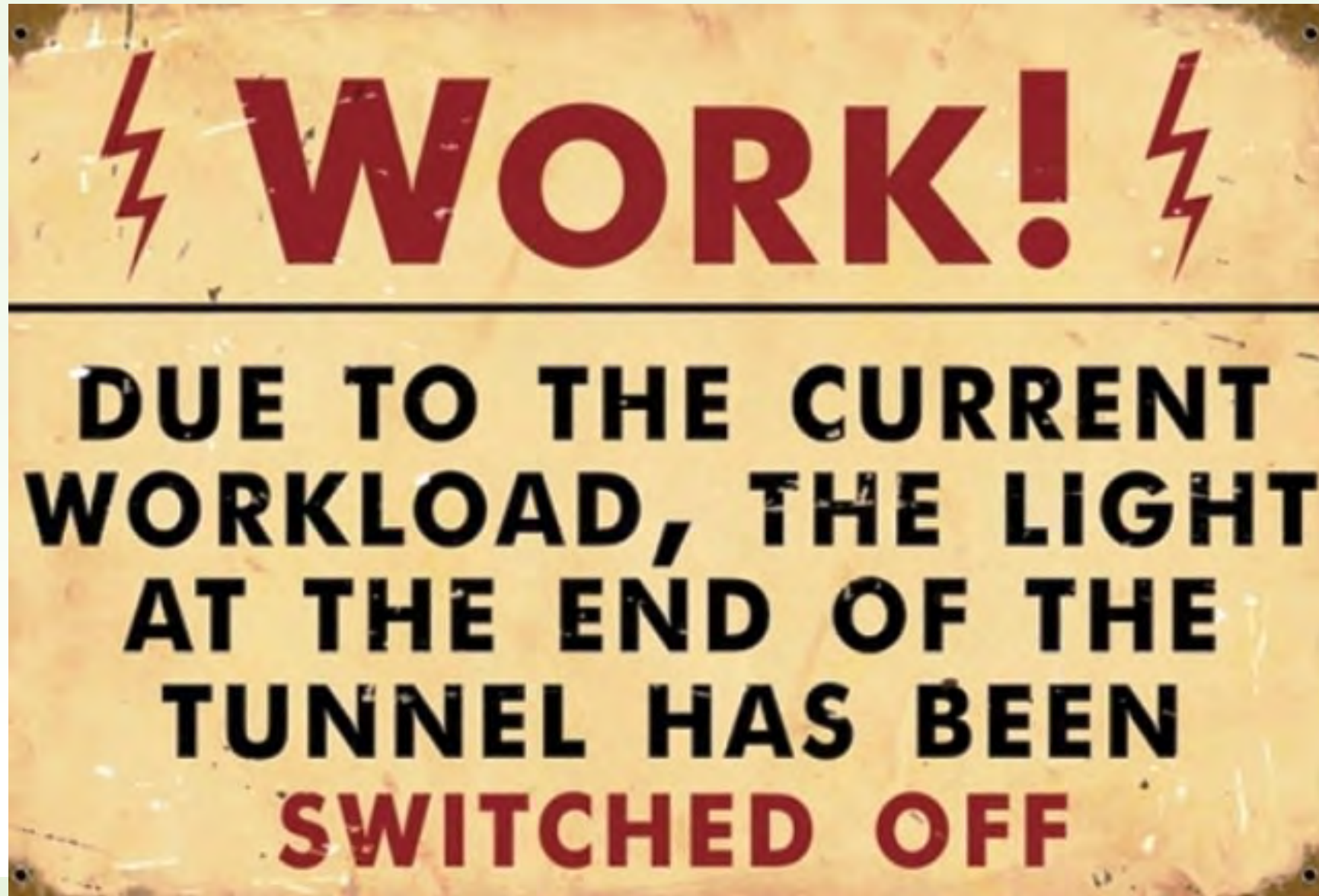
MAY 18, 2017

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Focus and Goal of Presentation

- This presentation is all about saving time
- Working more efficiently and effectively
- Most of us wear many hats and time is a precious commodity.
- Each year our workload gets heavier; requiring more and more time to get the job done.
- Every minute counts, every second counts.
 - Don't laugh; it all adds up.
- Over time, minutes add up to hours.
- None of us like working overtime.
- It is the old adage, work smarter instead of harder.
- You may know some of the items in this presentation but some people may not.

- I think sometimes we all feel like this!

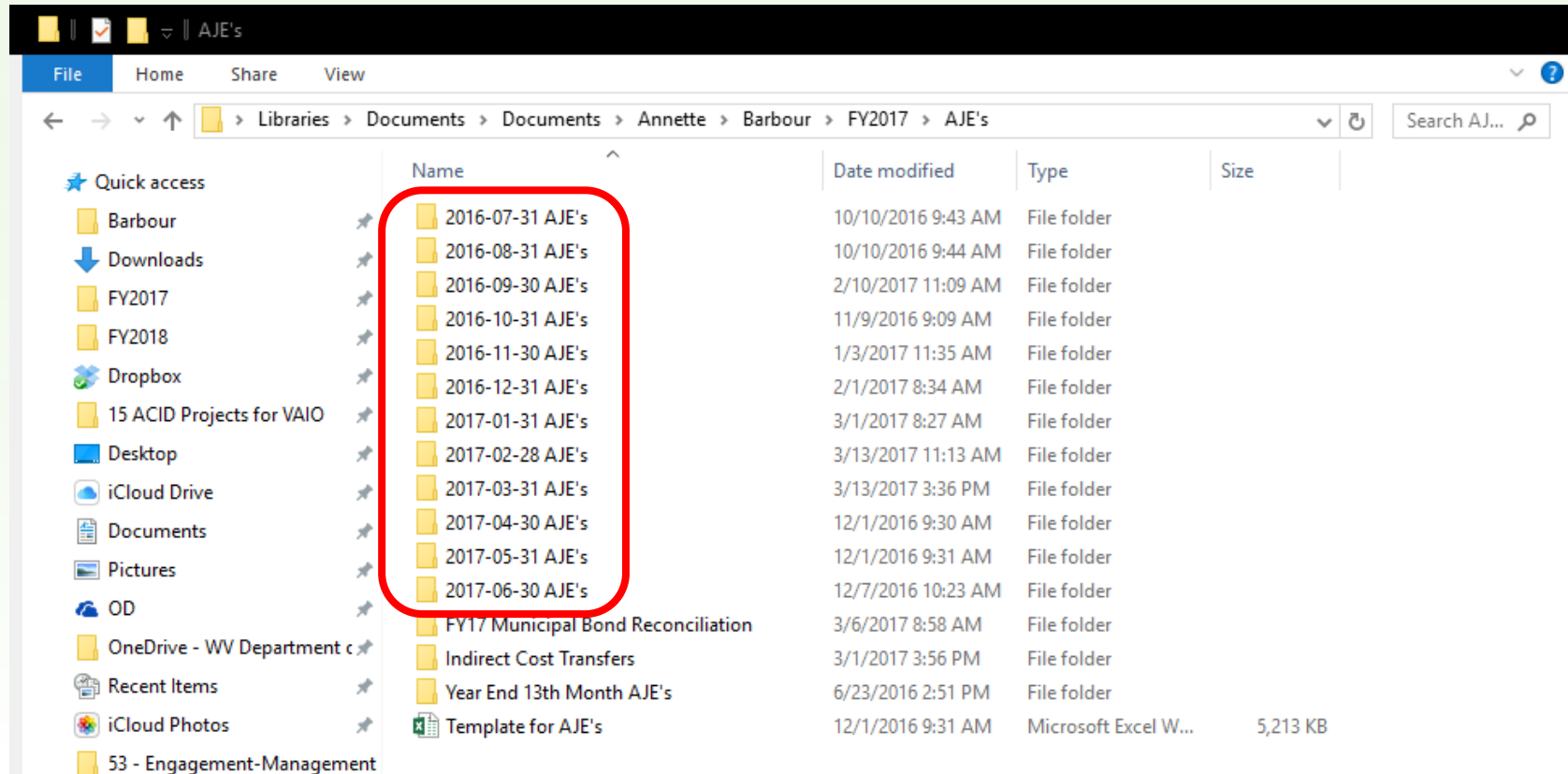




"It's a big misconception. Everyone thinks hell is all fire. Actually, it's all paperwork."

Date Format at Beginning of File Name

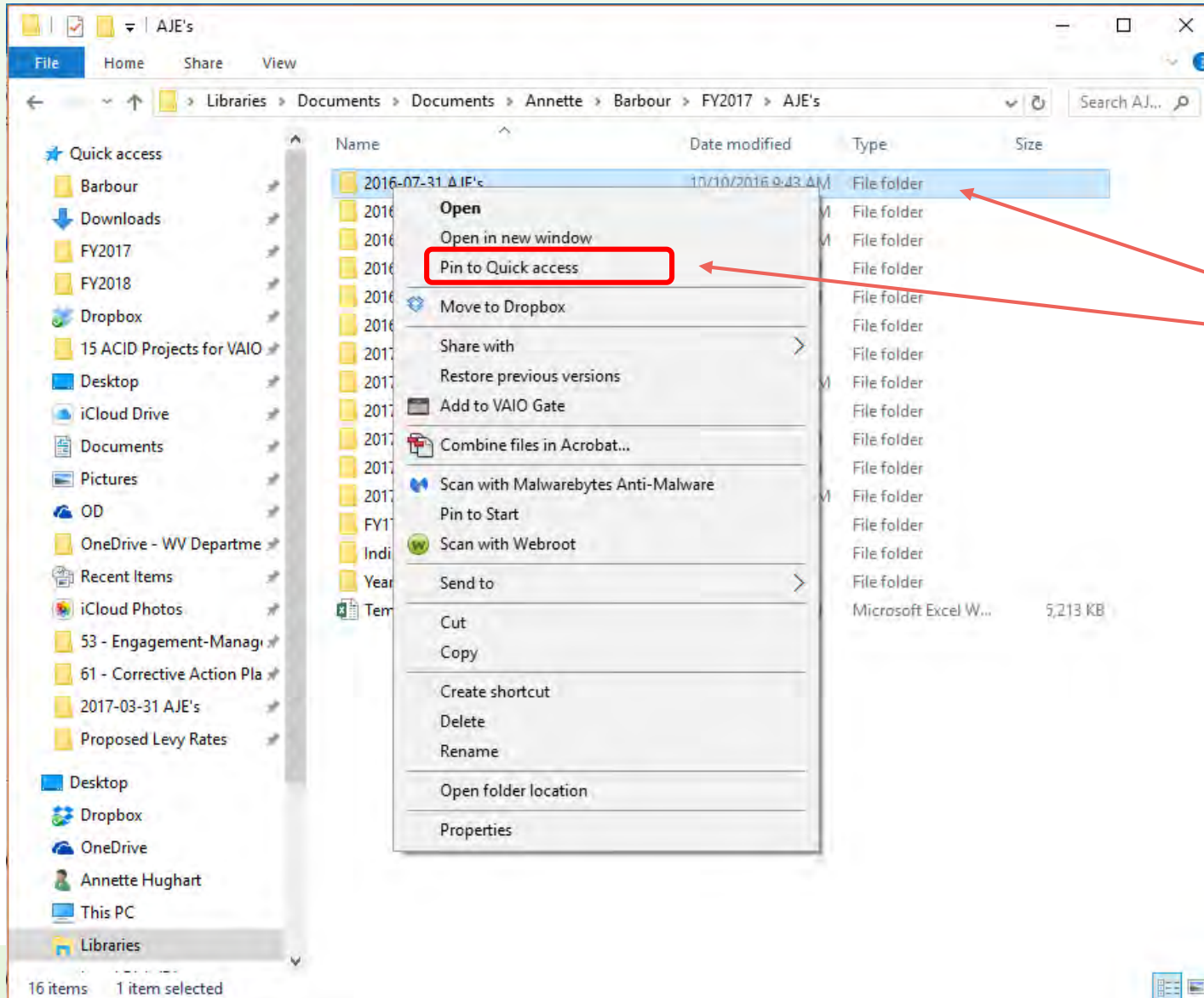
- To organize files and folders by date, use the date format at the beginning of the file name or folder as YYYY-MM-DD.



- This file format always keeps files and folders in date order.
- Be sure to use two digits for the month and day to ensure files stay in date order.

Windows Explorer Quick Access Folders

- Add folders to Windows Explorer window for quick access. This saves steps and mouse clicks.



Right click on any folder that you want to add to the "Quick Access" that is on the left side. Then click on "Pin to Quick access".

Organization of File Folders

- If you want to start saving things and stop printing, the key is ORGANIZATION of folders.
- To organize file folders think of them as you would for 3-ring binders and dividers or vendor file folders.
- Organize by fiscal year.
- Always set-up folders in the same order with the same descriptions each fiscal year to make it easy to find things.
 - Most of your file folders for each year will be the same as previous years.
 - To save time, set-up your folders for the year and then save these folders in another location to be used as a template for future years.
 - With these folders set-up you can just copy the folder listing into each new fiscal year.
 - Just check your current fiscal year folders for a few folder changes that may need made.

Organization of File Folders (contd.)

- Set-up file folders with dates in the YYYY-MM-DD format at the beginning of the folder name. This will keep folders in date order.
- All of my documents are on my hard drive that I back up to an external drive and keep at home so it is not in the same place as my computer most of the time.
- All of my documents are on the OneDrive except the current year since the OneDrive is too slow to work from and can't handle the complexity of our Excel files.

Organization of File Folders (contd.)

Most everything I save is under a fiscal year, however, there are some things that don't fit into a fiscal year category and saved under (*just a partial list*):

- Deeds
- GPS Coordinates for all WV schools
- Manuals
- Templates
- Letterhead
- Maps
- Vehicle Registration Cards
- Property
- School Bank Accounts
- School Floor Plans
- WV State Code Sections
- VPN Set-Up
 - *Because, lol, you can't ever remember how to set it up again.*
- WVEIS Manuals
- WVEIS Settings, etc.

File Folder Organization Example

The screenshot displays a Windows File Explorer window with the following details:

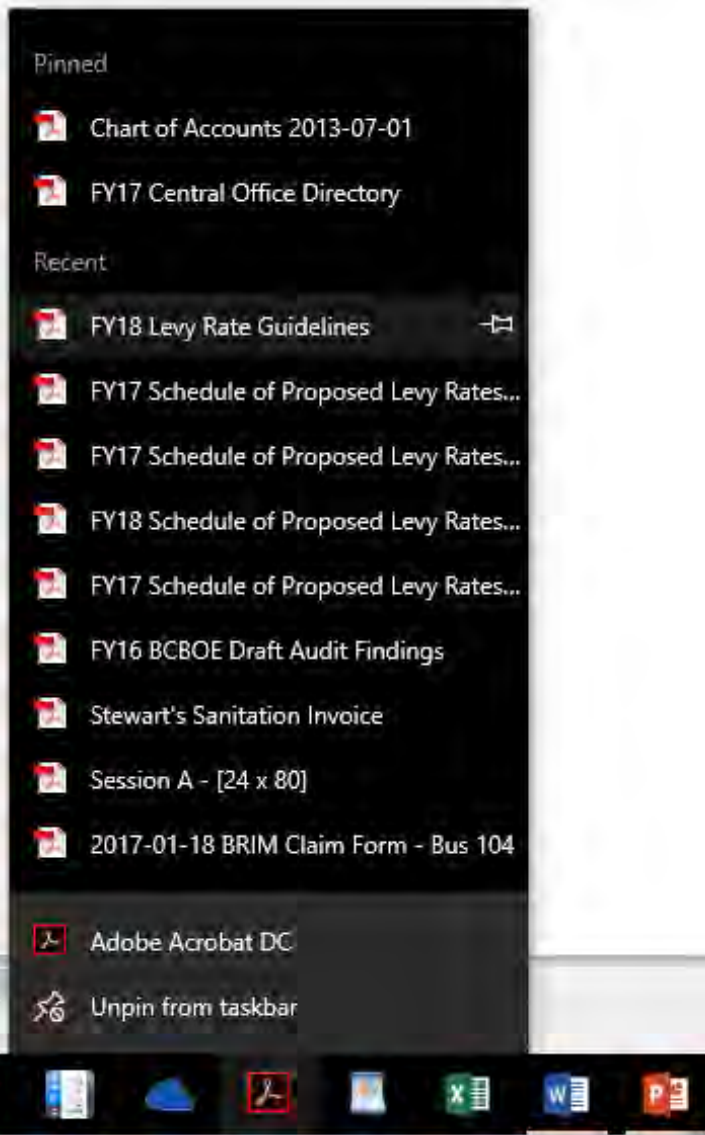
- Address Bar:** Libraries > Documents > Documents > Annette > Barbour > **FY2017** (circled in red)
- Left Pane (Navigation):** Quick access (Barbour, Downloads, FY2017, FY2018, Dropbox, 15 ACID Projects for VAIO, Desktop, iCloud Drive, Documents, Pictures, OD, OneDrive - WV Department c..., Recent Items, iCloud Photos, 53 - Engagement-Managem..., 61 - Corrective Action Plan, 2017-03-31 AJE's, Proposed Levy Rates), Desktop, Dropbox, OneDrive, Annette Hughart, This PC, Libraries, Local Disk (E:), Network, Control Panel, Recycle Bin, Adobe Acrobat XI, V7R1M064, V7R1M064.
- Main Pane (Table):**

Name	Date modified	Type	Size
1095-C	1/12/2017 12:24 PM	File folder	
1099's	2/2/2017 11:21 AM	File folder	
Affordable Care Act	1/24/2017 1:58 PM	File folder	
AJE's	12/1/2016 9:31 AM	File folder	
Allegheny Insurance	8/2/2016 8:43 AM	File folder	
American Fidelity	1/31/2017 8:38 AM	File folder	
Bank of America	3/2/2017 8:34 AM	File folder	
Bank Reconciliation	3/2/2017 10:18 AM	File folder	
Bankruptcy Discharge	6/23/2016 3:47 PM	File folder	
BC Bank	3/1/2017 8:22 AM	File folder	
Bids	6/23/2016 3:47 PM	File folder	
BJE's	3/3/2017 8:12 AM	File folder	
Board Financial Reports	1/27/2017 11:44 AM	File folder	
Board Meeting Agenda Items	3/13/2017 8:51 AM	File folder	
Board Utility Reports	3/6/2017 9:05 AM	File folder	
Bonding Potential	9/15/2016 8:45 AM	File folder	
Brickstreet	6/23/2016 3:48 PM	File folder	
Brickstreet Premium Audits	6/23/2016 3:48 PM	File folder	
BRIM Claims	1/19/2017 1:52 PM	File folder	
BRIM Insurance Certificates	6/22/2016 6:58 AM	File folder	
BRIM Insurance Questionnaire	1/24/2017 8:31 AM	File folder	
BRIM Loss Control Questionnaire	6/23/2016 3:49 PM	File folder	
Budget	2/1/2017 9:44 AM	File folder	
Budget Reconciliation	3/2/2017 11:22 AM	File folder	
Budget Transfer Forms	3/2/2017 10:34 AM	File folder	
Bureau of Labor Statistics	6/23/2016 3:49 PM	File folder	
C.J. Wells	6/23/2016 3:49 PM	File folder	
Cash Drawdowns	3/1/2017 4:03 PM	File folder	
Cash Ledger	3/2/2017 3:02 PM	File folder	
Certified List	12/7/2016 2:56 PM	File folder	
Check Registers	3/10/2017 2:24 PM	File folder	
Child Nutrition	12/20/2016 8:42 AM	File folder	
City of Philippi	6/23/2016 3:50 PM	File folder	
CMS GHP Report for IRS-SSA-CMS Data ...	2/6/2017 11:31 AM	File folder	
ComDoc	3/10/2017 2:27 PM	File folder	
Conferences	11/16/2016 8:18 AM	File folder	
Contracts	6/23/2016 3:51 PM	File folder	
Deposits	7/5/2016 9:44 AM	File folder	
Directories	2/2/2017 2:18 PM	File folder	
Early Retirement	3/7/2017 10:07 AM	File folder	
Employee Handbook	2/22/2017 2:59 PM	File folder	
EnerNOC	8/16/2016 11:35 AM	File folder	
F-Rate	1/30/2017 9:02 AM	File folder	

116 items | 1 item selected

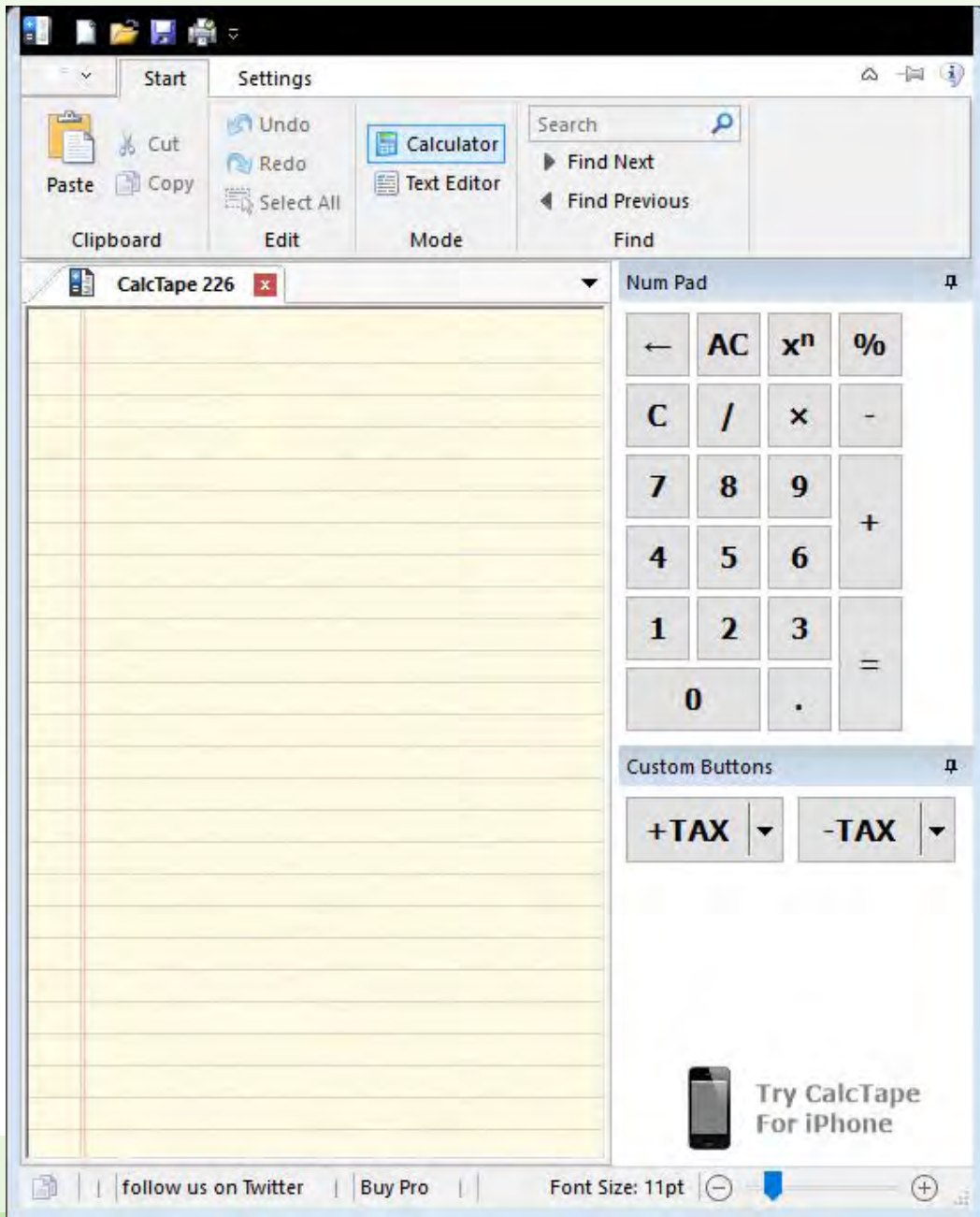
Pin Files to Task Bar Programs

- When you have programs pinned to the task bar you can right click on the program to see recently viewed files.



To pin files to the program, look under "Recent" for the files recently used, then click on the thumb tack to the right. This will pin the file to the program.

CalcTape - Free Program



- A handy free program to use instead of an adding machine is **CalcTape**. I can't tell you the last time I used the adding machine on my desk.
- CalcTape can be used run a tape, can be printed and can even be saved. There is also the feature to add text descriptions, as well.
- It can be downloaded at http://download.cnet.com/CalcTape/3000-20417_4-90456.html

CalcTape Saved File with Text Descriptions

When you save the file, the file name becomes the tab name.

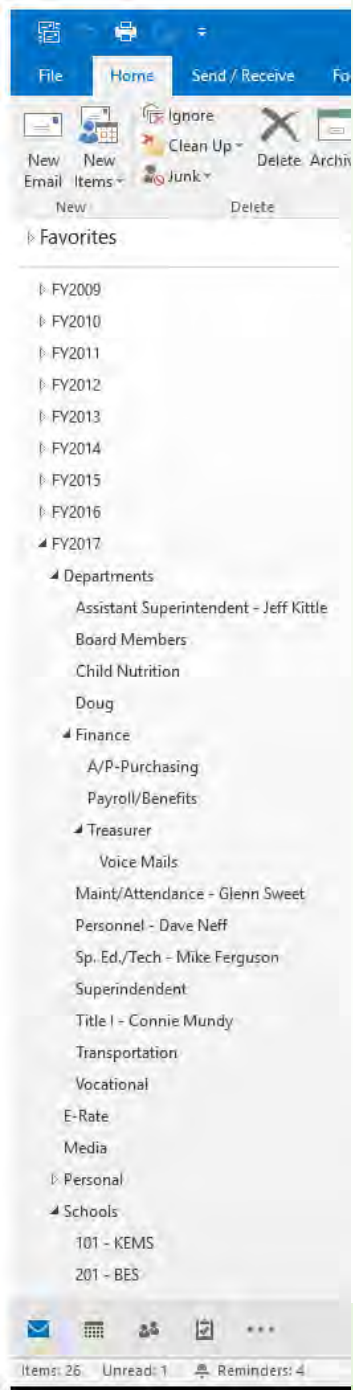
The screenshot shows the CalcTape software interface. The top menu bar includes 'Start', 'Settings', 'Undo', 'Redo', 'Select All', 'Clipboard', 'Edit', 'Mode', and 'Find'. The 'Find' section has options for 'Find Next' and 'Find Previous'. The main window displays a spreadsheet with the following data:

Line	Amount	Description
1	+ 472,483.430000	Total Unrestricted Transportation Expenditures Excluding Payroll
2	- 1,923.310000	Deductibles Insurance, 11..12711.528
3	- 5,000.000000	Bus Replacement, 11..12711.741
4	- 1,465.790000	Property Insurance, 11..12731.521
5	- 319.600000	Payment in Lieu of Transp, 11..12791.514
6	- 80,873.600000	Vehicle Insurance, 11..12791.522
7	+ 81.000000	Liability Insurance, 11..12791.523
<hr/>		
	+ 382,982.130000	Reconciles with FY15 Transportation Allowance for Operation, Maintenance & Contracted Services
1	+ 1,923.310000	Deductibles Insurance, 11..12711.528
2	+ 1,465.790000	Property Insurance, 11..12731.521
3	+ 80,873.600000	Vehicle Insurance, 11..12791.522
4	- 81.000000	Liability Insurance, 11..12791.523
<hr/>		
	+ 84,181.700000	Reconciles with FY14 Transportation Insurance Allowance
1	+ 354,258.000000	County Transportation Allowance at 92.5%
2	+ 28,724.000000	Add'l Allowance Oper & Maint. For Alt. Fuel Buses (7.5%)
3	+ 84,182.000000	Insurance @ 100%
4	+ 287.000000	In Lieu Allowance
5	+ 780.000000	Operation & Maintenance MCVS Share (Add'l 7.5%)
6	+ 206,058.000000	Bus Replacement Allocation
<hr/>		
	+ 674,289.000000	Total Transportation Allowance
1	+ 674,289.000000	Total Transportation Allowance
2	- 206,058.000000	Bus Replacement Allocation
<hr/>		
	+ 468,231.000000	Transportation Allowance, Net of Bus Replacement
1	+ 468,231.000000	Transportation Allowance, Net of Bus Replacement
2	- 472,483.430000	Total FY13 Transportation Expenditures Excluding Payroll
<hr/>		
	- 4,252.430000	FY13 Transportation Expenditures Not Reimbursement

The status bar at the bottom shows: 468,231.000000 | CalcTape Freeware Edition (Personal use only) | follow us on Twitter | Buy Pro | Activate Pro | Font Size: 11pt

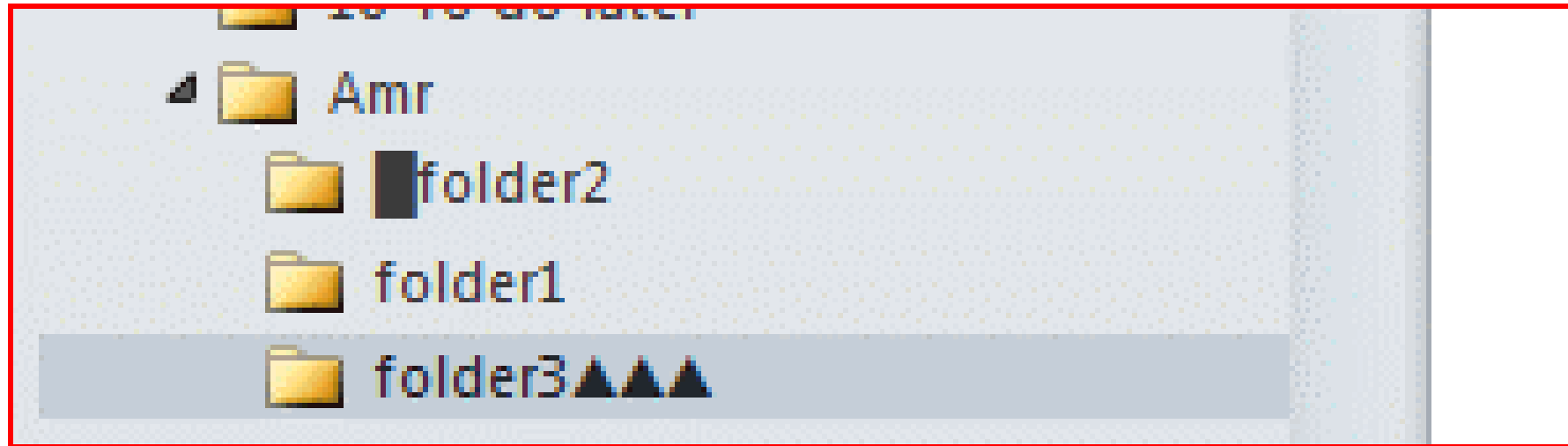
Email Organization

- Organize emails by fiscal year.
- Always set-up folders within each fiscal year the same.
 - This will make it easier to find an email when the search feature returns too many possibilities or you aren't searching on the correct wording.



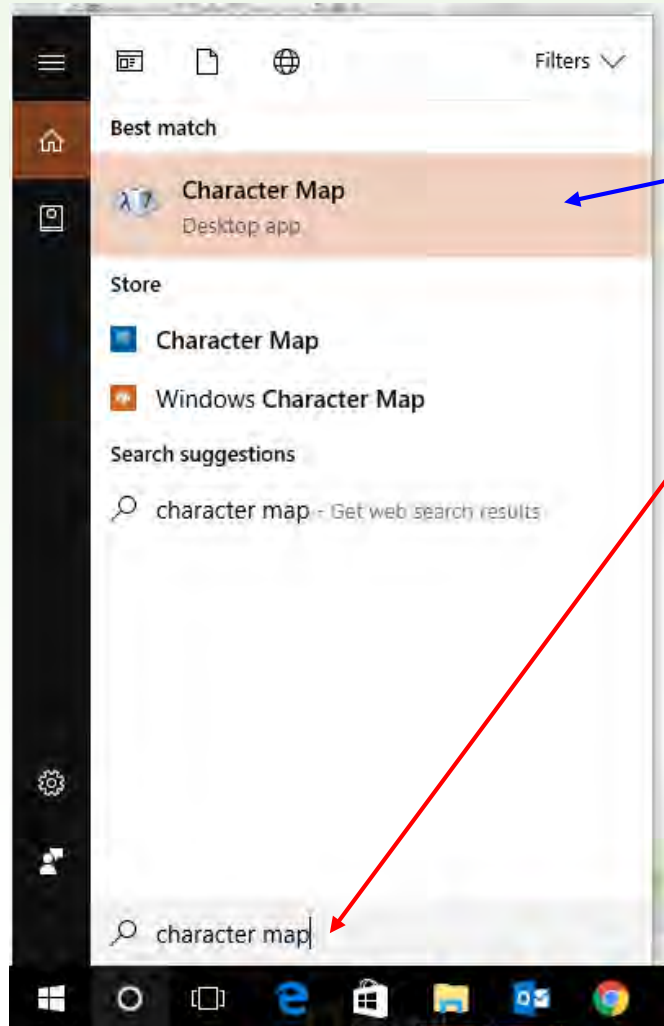
Quickly Spot Folders in Microsoft Outlook

- Microsoft Outlook still does not permit changing the color of a folder. A work around can be to use special characters in the built-in windows application "**Character Map**".



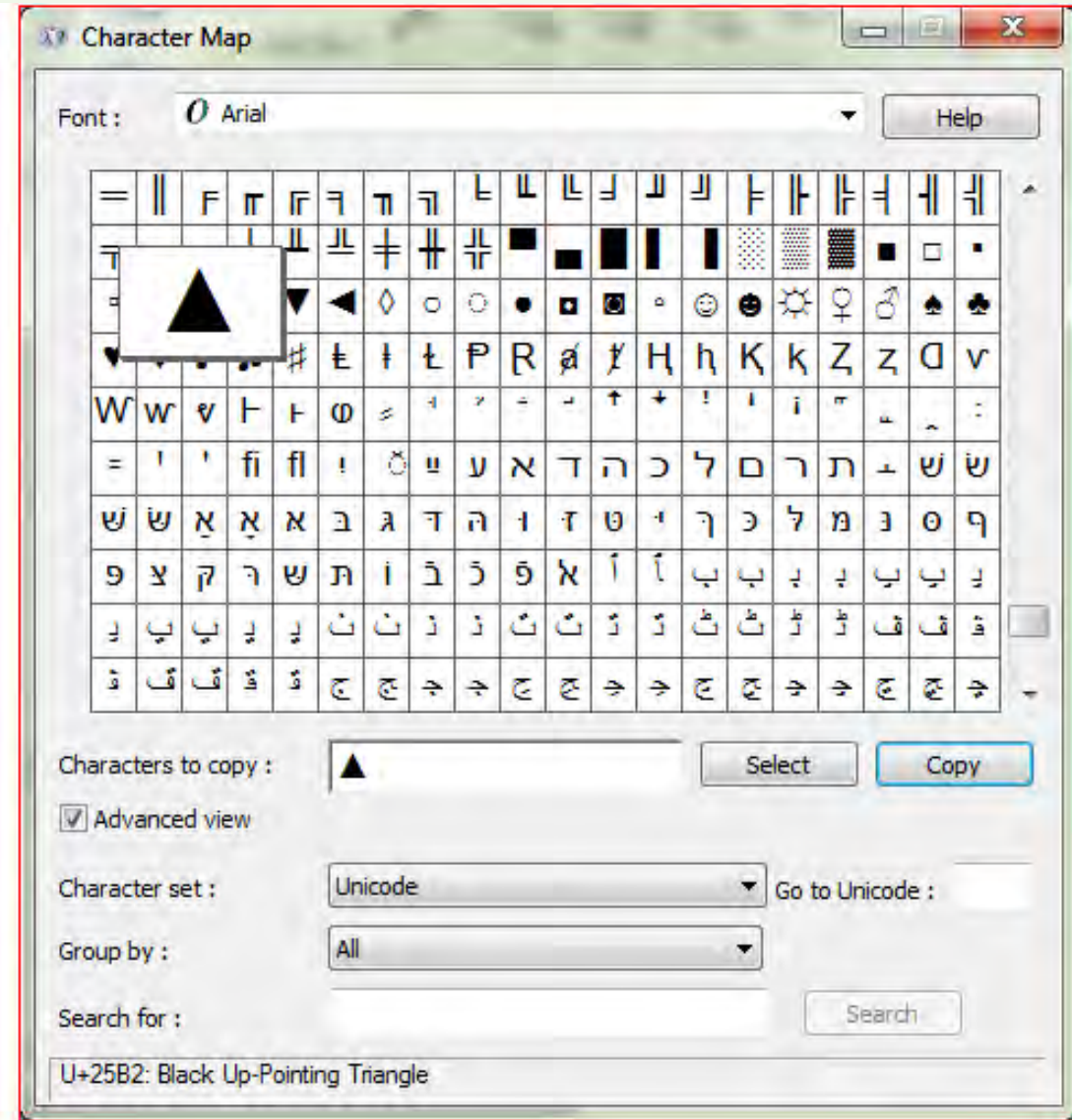
Quickly Spot Folders in Microsoft Outlook (contd.)

- In the Windows search box type, "Character Map" and choose "Character Map" Desktop app.



Quickly Spot Folders in Microsoft Outlook (contd.)

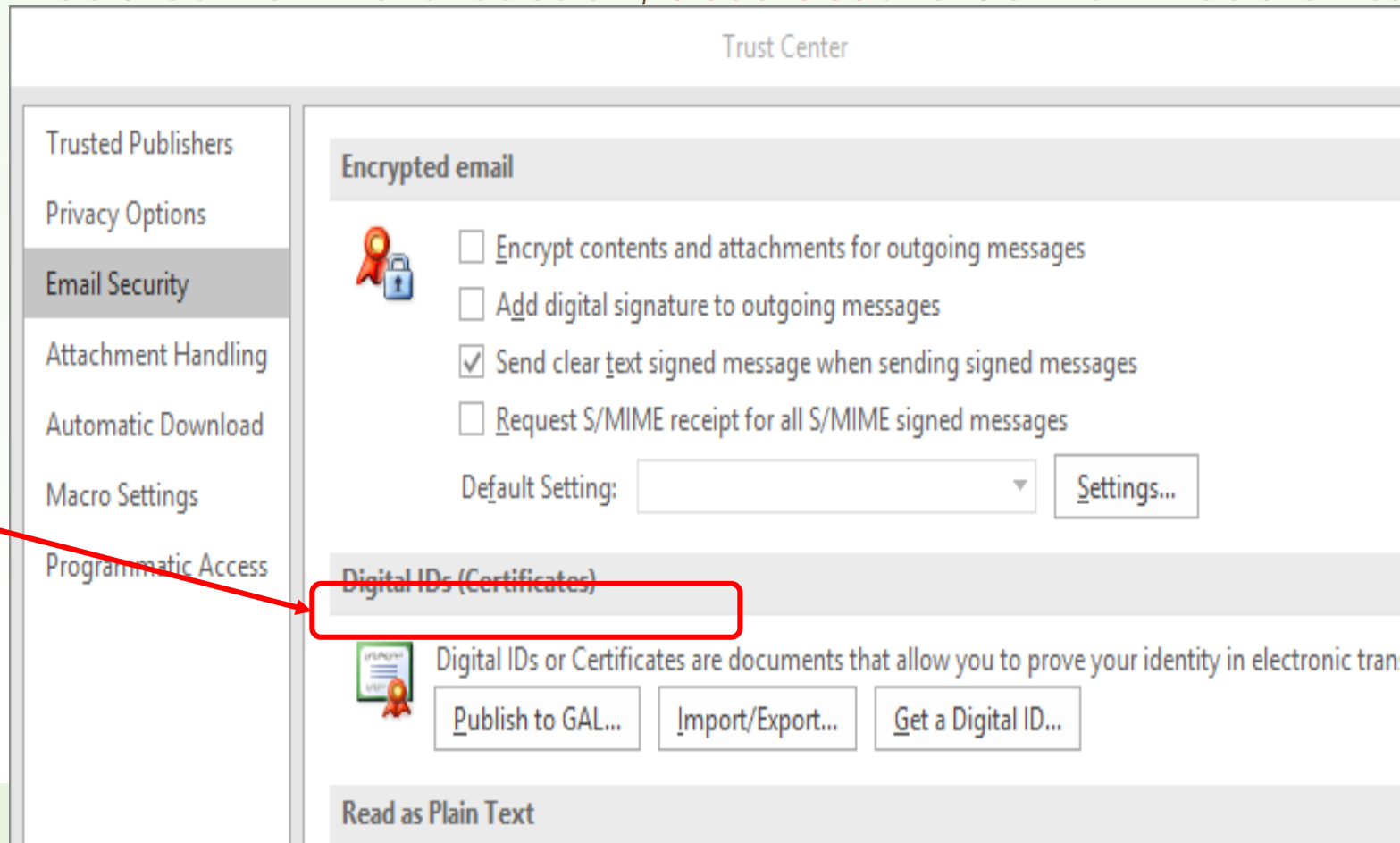
- With the Character Map window open, copy the character that you want to use.



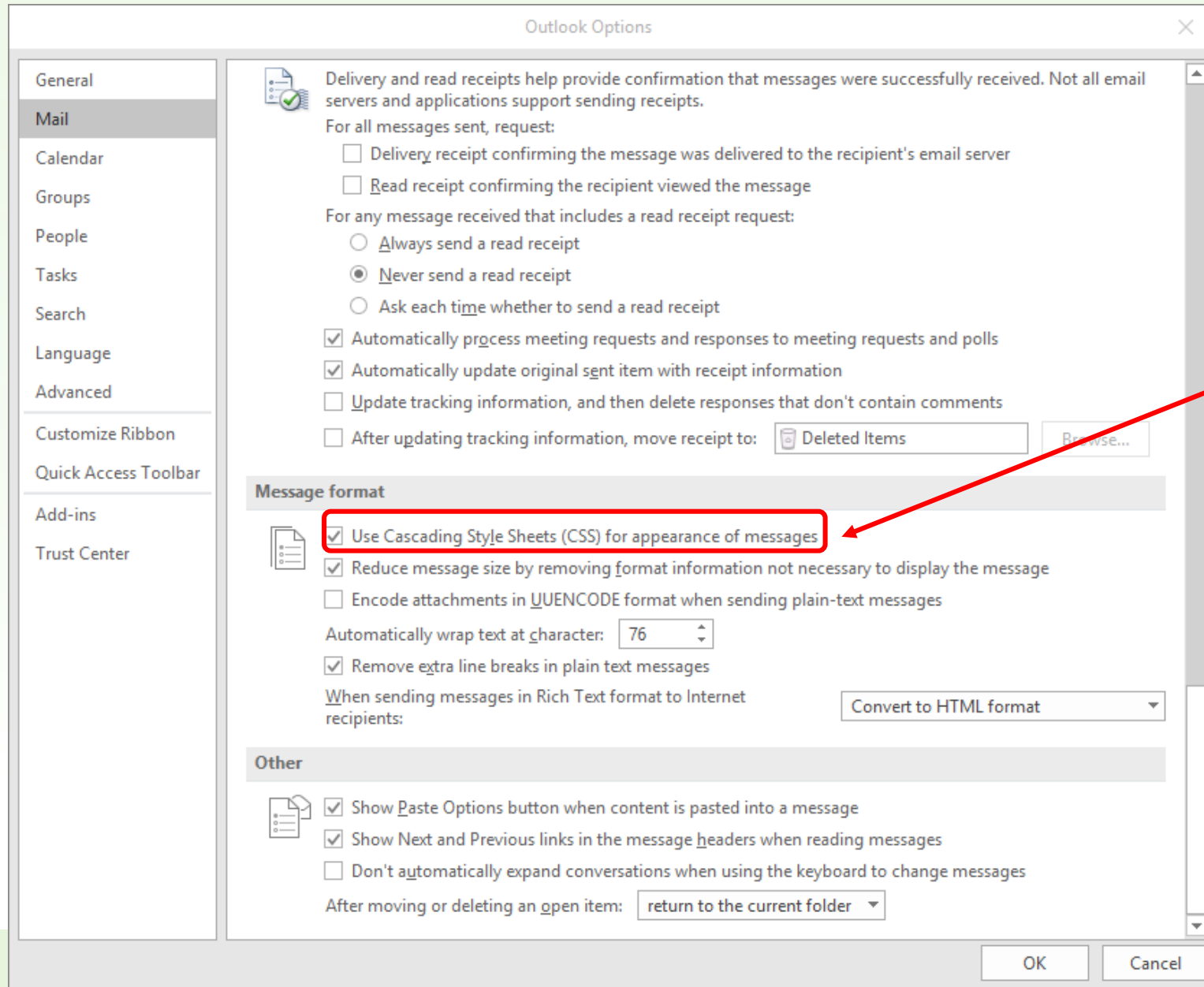
Personnel - Dave Neff
Sp. Ed./Tech - Mike Ferguson
Superintendent▲▲▲
Title I - Connie Mundy
Transportation
Vocational

Change File Type of Incoming Emails

- In Outlook, select “**File**”, then “**Options**”.
- Select “**Trust Center**” in the left pane.
- Select “**Trust Center Settings**”, then “**Email Security**”.
- In the “Read as Plain Text” section, **deselect** the box for “**Read all standard mail in plain text**”.



Cascading Emails



- Cascade emails to show all related emails in a string.
- In Outlook, go to **File**, then **Mail**, then under "Message format", check the "Use Cascading Style Sheets (CSS) for appearance of messages".

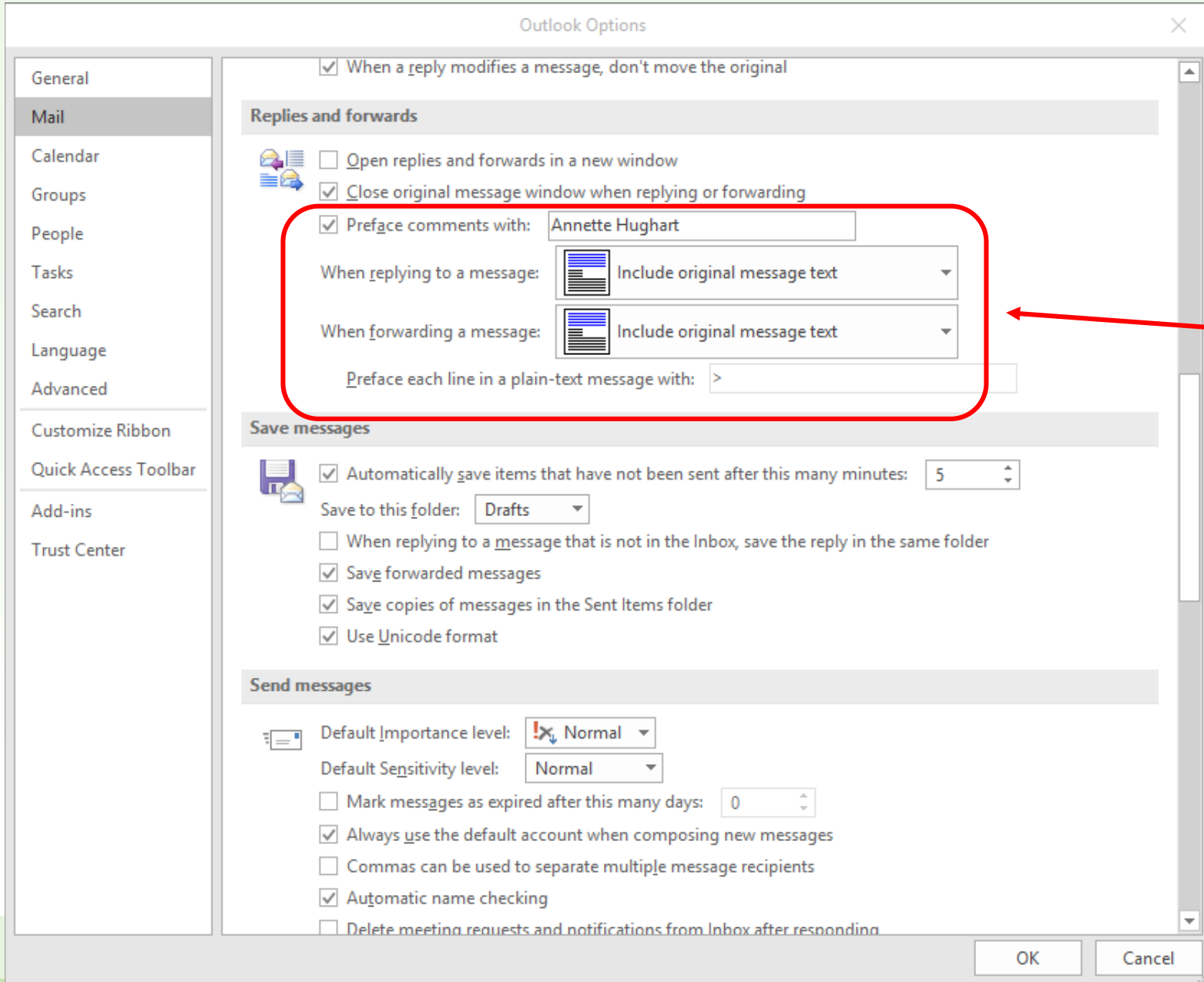
Cascading Email Example

The screenshot shows an Outlook window with the following elements:

- Top Bar:** "Other Treasurers - ahughart@k12.wv.us - Outlook"
- Home Tab:** Includes "File", "Home", "Send / Receive", "Folder", "View", "ADOBE PDF", and "Tell me what you want to do".
- Command Bar:** Contains icons for "New Email", "Clean Up", "Delete", "Archive", "Reply", "Reply All", "Forward", "More", "Transportation", "Team Email", "Reply & Delete", "Move", "Rules", "OneNote", "Unread/Read", "Categorize", "Follow Up", "New Group", "Browse Groups", "Search People", "Address Book", "Filter Email", and "Store".
- Left Sidebar (Favorites):** Lists folders such as "Wendel", "Workforce WV - Unemployment", "World Vision", "WV Board of Accountancy", "WV BRIM", "WV DEP", "WV DEpt of Agriculture", "WV Dept of Transp", "WV Development Office", "WV DHHR", "WV Municipal Bond Commission", "WV PEIA", "WV Retirement Board", "WV Secretary of State", "WV State Police", "WV State Tax Dept", "WV State Treasurer's Office", "WVEA", "WVASBO", "Other Treasurers", "SASBO", "WVASIS", "WVCoRP", "WVDE", "Budget Entry Approval", "WVEA", "WWEIS", "WVSAO", "Auditors", "Direct Deposits", "WVU Extension Service", and "Drafts [1]".
- Search Bar:** "Search Other Treasurers" and "Current Folder".
- Email List:** A list of emails with columns for "Unread", "Mentions", and "Newest". The "Other Treasurers" folder is selected, and the email "RE: Monthly Financial Statement Template" is highlighted.
- Email Content:** The selected email is from Amy Downey to Annette Hughart, dated Tue 2/21/2017 11:11 AM. The subject is "RE: Monthly Financial Statement Template". The body text includes: "Ok. I will do that. I thought I was crazy and I kept redoing the report and then testing different parameters. I'll email Kim and let you know what she says. Thanks, Amy W. Downey, Treasurer Roane County Schools". Below this is a reply from Annette Hughart dated Tuesday, February 21, 2017 11:10 AM, with the subject "RE: Monthly Financial Statement Template". The body text includes: "Amy, It is a programming issue in WVEIS. I have contacted Kim Harvey before on these issues and a...". Below this is another reply from Amy Downey dated Tuesday, February 21, 2017 10:43 AM, with the subject "RE: Monthly Financial Statement Template". The body text includes: "Annette, I've been setting up your reports and noticed that you seem to have an issue that I'm also having. On your food service report, 2013 is nearly all zeros and 2012 is all zeros. My 2013 and 2012 are also showing as all zeros for those years. Any thoughts on why that is showing like that?".
- Bottom Bar:** "Items: 221", "Reminders: 4", "All folders are up to date.", "Connected to: Microsoft Exchange", and "100%".

All of these emails are organized and tracked together based on the email conversation

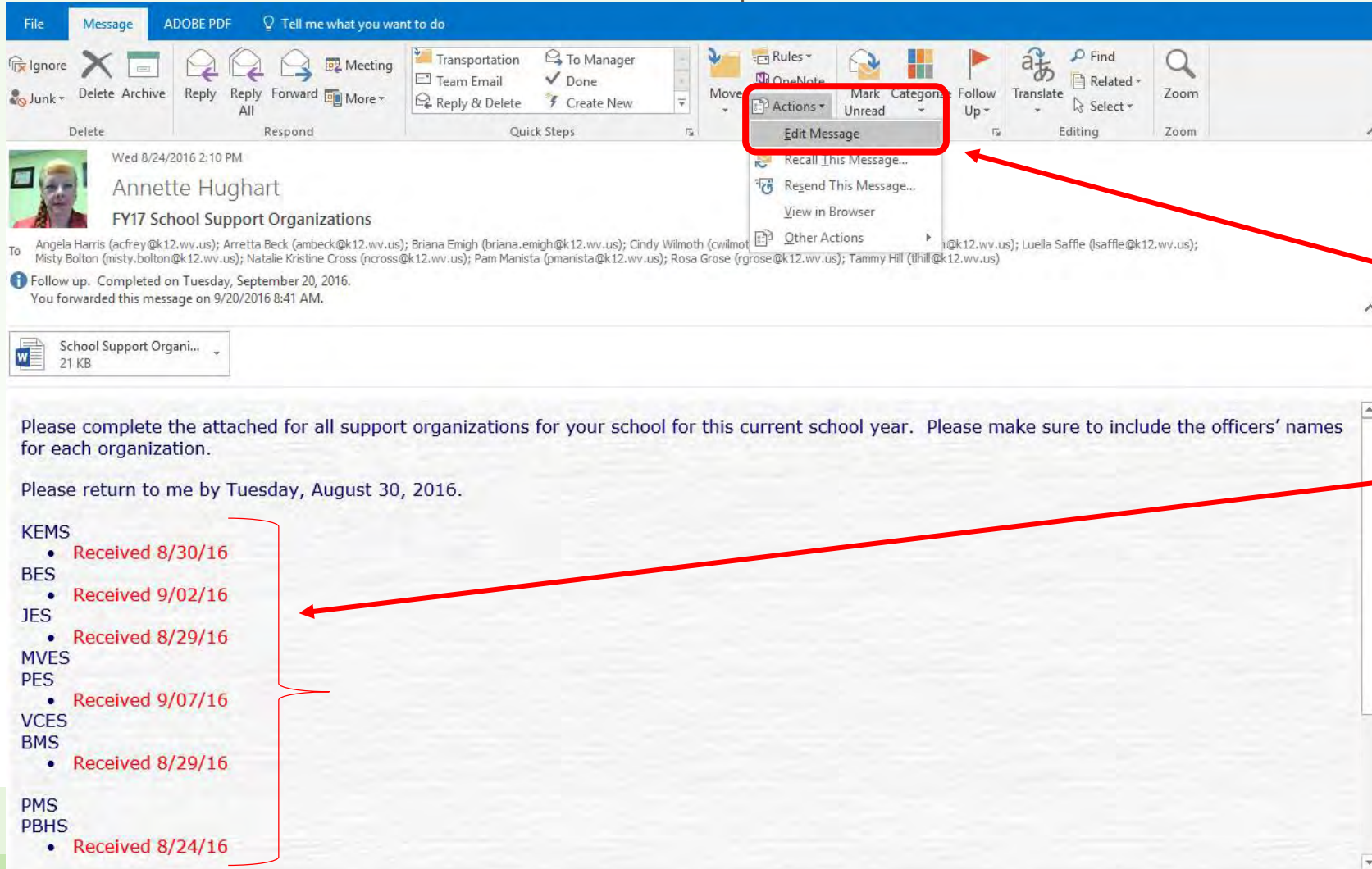
Preface Email Response Comments with Your Name



- In Outlook, go to **File**, then **Mail**, then under “**Replies and forwards**”, check the “**Preface comments with:**” and type your name in the blank field.

How to Edit/Make Notes on an Email Already Sent

- When you need information/responses from many people it can be cumbersome in tracking responses to ensure information has been provided by everyone.
- Open the already sent email in Outlook then click on the dropdown for “**Actions**”, select “**Edit Message**”. Then type anywhere in the email. You can also edit the font on anything in the email. The edited email is only seen by you; Outlook doesn’t send the edited email to the recipients.

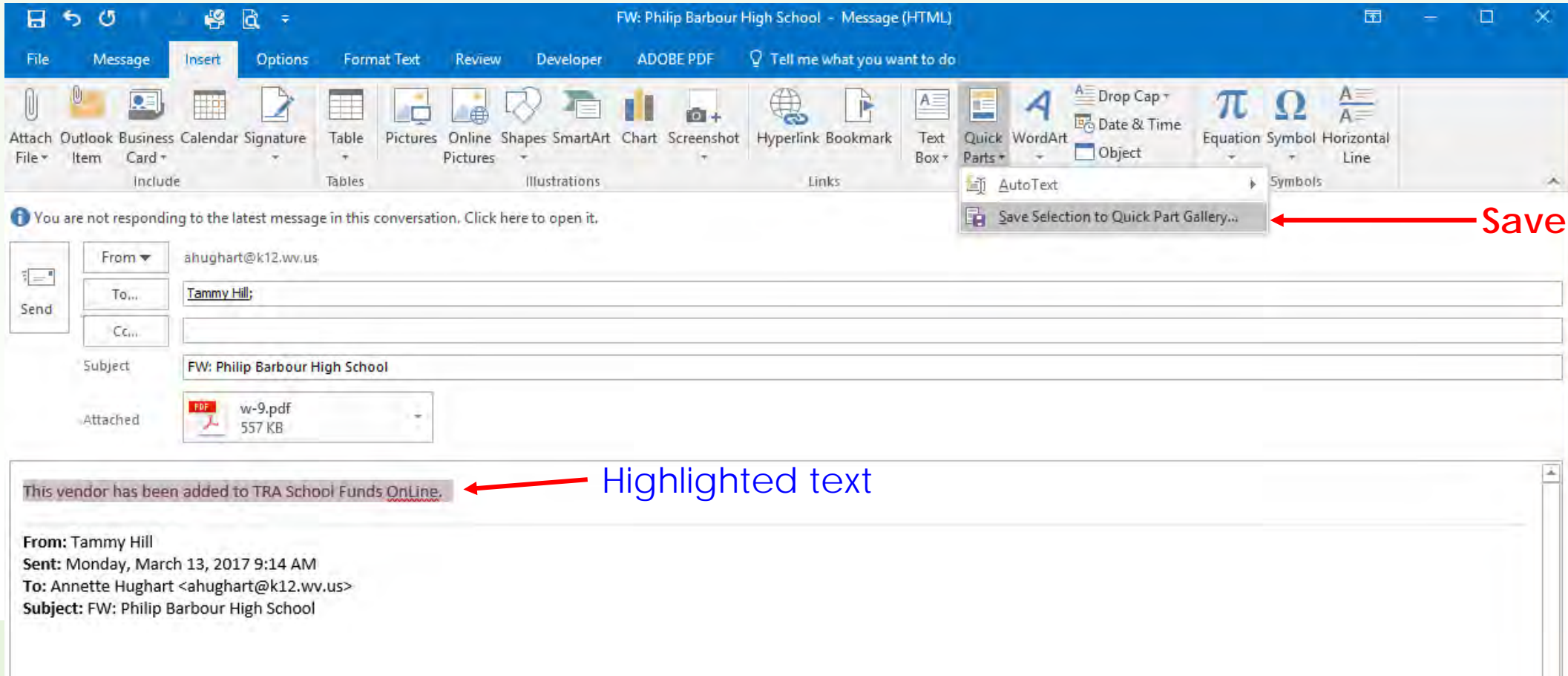


The red text is my edits to track responses

Editing emails is an easy way to document / track verbal responses from phone conversations as well.

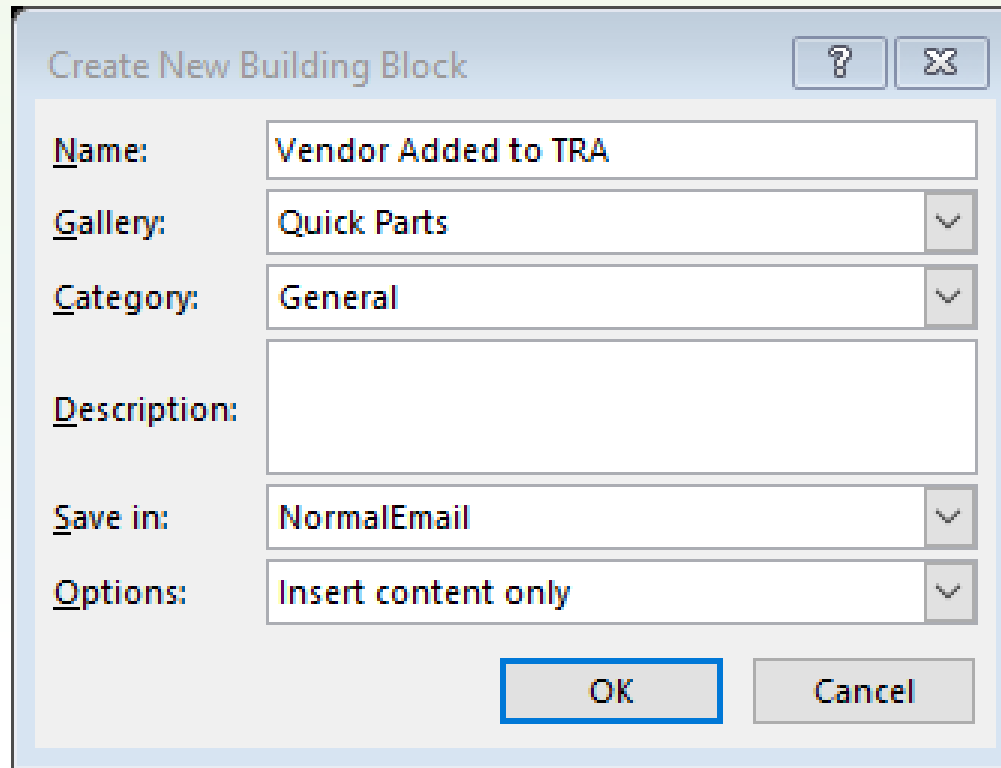
Outlook Quick Parts

- We often type the same or very similar responses when replying to emails.
- To save time, save these phrases to **Quick Parts**.
- Highlight the text that you want to add to Quick Parts, then click on Quick Parts, then Save Selection to Quick Part Gallery.



Outlook Quick Parts (contd.)

- This next screen comes up to save your phrase. In the top field “**Name**” give the phrase a description. Then click OK.



The screenshot shows the 'Create New Building Block' dialog box. It has a title bar with a question mark and a close button. The dialog contains several fields:

- Name:** A text box containing 'Vendor Added to TRA'. A red arrow points to this field.
- Gallery:** A dropdown menu showing 'Quick Parts'.
- Category:** A dropdown menu showing 'General'.
- Description:** An empty text box.
- Save in:** A dropdown menu showing 'NormalEmail'.
- Options:** A dropdown menu showing 'Insert content only'.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Outlook Quick Parts (contd.)

- To use a previously saved Quick Part, click On Quick Parts and a listing of saved Quick Parts appears, click on the phrase that you want to insert.

The screenshot shows the Microsoft Outlook interface with the 'Insert' tab selected in the ribbon. The 'Quick Parts' button is highlighted, and a red arrow points from it to the Quick Parts gallery. The gallery displays a saved Quick Part titled 'Vendor Added to TRA' with the text 'This vendor has been added to TRA School Funds OnLine.' The ribbon includes 'File', 'Message', 'Insert', 'Options', 'Format Text', 'Review', 'Developer', 'ADOBE PDF', and 'Tell me what you want to do'. The 'Quick Parts' button is highlighted in the 'Insert' tab. The gallery also shows 'AutoText' and 'Save Selection to Quick Part Gallery...' options.

FW: Philip Barbour High School - Message (HTML)

File Message **Insert** Options Format Text Review Developer ADOBE PDF Tell me what you want to do

Attach Outlook Business Calendar Signature Table Pictures Online Shapes SmartArt Chart Screenshot Hyperlink Bookmark Text Quick Word Drop Cap Equation Symbol Horizontal
File Item Card Part Pictures Pictures Illustrations Links Box Parts Art & Time Symbol Horizontal
Include Tables Links

General
Vendor Added to TRA
This vendor has been added to TRA School Funds OnLine.

AutoText
Save Selection to Quick Part Gallery...

You are not responding to the latest message in this conversation. Click here to open it.

From: ahughart@k12.wv.us
To: Tammy Hill;
Cc:
Subject: FW: Philip Barbour High School
Attached: w-9.pdf (557 KB)

This vendor has been added to TRA School Funds OnLine.

Outlook Quick Parts (contd.)

- Since getting to “Quick Parts” in the toolbar is cumbersome and too many steps, you can add “Quick Parts” to the Quick Access Tool Bar that is at the very top of emails. To add, **right click** on “Quick Parts” and choose “Add to Quick Access Tool Bar”

The screenshot displays the Outlook ribbon with the 'Insert' tab selected. A red box highlights the 'Quick Parts' icon in the ribbon, with a red arrow pointing to it and the text 'Shows up here'. A red arrow points to the 'Quick Parts' icon with the text 'Right Click'. A context menu is open over the 'Quick Parts' icon, with a red box around the 'Add to Quick Access Toolbar' option and a red arrow pointing to it. The context menu also includes options for 'Customize Quick Access Toolbar...', 'Show Quick Access Toolbar Below the Ribbon', 'Customize the Ribbon...', and 'Collapse the Ribbon...'. Below the ribbon, the email header shows the sender as 'ahughart@k12.wv.us', the recipient as 'Tammy Hill', and the subject as 'RE: SIGNED W-9'. The email body contains the following text:

From: Tammy Hill
Sent: Wednesday, May 10, 2017 8:07 AM
To: Annette Hughart <ahughart@k12.wv.us>
Subject: FW: SIGNED W-9

CURRENTLY BUSY. PLEASE DO NOT DISTURB.



TODAY I WILL KNOW THE JOY OF
UNINTERRUPTED PRODUCTIVITY.

My Tasks Screenshot

Outlook interface showing the 'My Tasks' view. The window title is 'To-Do List - ahughart@k12.wv.us - Outlook'. The ribbon includes 'Home', 'Send / Receive', 'Folder', 'View', and 'ADOBE PDF'. The 'To-Do List' view is selected, showing a list of tasks with columns for 'TASK SUBJECT', 'START DATE', 'REMINDER TIME', 'DUE DATE', 'IN FOL...', and 'CATEGORIES'.

Left sidebar: My Tasks, To-Do List, Tasks - ahughart@k12.wv.us, Tasks - ahughart@access.k12.wv.us, Tasks - iCloud Archive, iCloud, Tasks - iCloud.

Search: Search To-Do List

TASK SUBJECT	START DATE	REMINDER TIME	DUE DATE	IN FOL...	CATEGORIES
Click here to add a new Task					
Flag: Due Date: Tomorrow					
Send Out Monthly Condoc Assoc Invoices	None	Wed 3/15/2017 8:00 AM	Wed 3/15/2017	Tasks	
Put Flea and Tick Medicine on Dogs	None	Wed 3/15/2017 8:30 AM	Wed 3/15/2017	Tasks	
Flag: Due Date: This Week					
Check WVEIS WOW for Grants, Reimbursements, Budget Entries	None	Thu 3/16/2017 9:00 AM	Thu 3/16/2017	Tasks	
Check Freedom Bank Balance	None	Thu 3/16/2017 8:00 AM	Thu 3/16/2017	Tasks	
Flag: Due Date: Next Week					
E-Mail Directors for Quarterly Grant Clean Up	Mon 3/20/2017	Mon 3/20/2017 8:00 AM	Mon 3/20/2017	Tasks	
Record Budget Supplement for Unfunded Retirement Liability	None	Mon 3/20/2017 8:00 AM	Mon 3/20/2017	Tasks	
Backup Computer	Tue 3/21/2017	Tue 3/21/2017 8:00 AM	Tue 3/21/2017	Tasks	
Flag: Due Date: This Month					
Submit List of Early Retirement Bonus Employees to WVDE by March 15th	Wed 3/15/2017	Mon 3/27/2017 8:00 AM	Mon 3/27/2017	Tasks	
Do BJE to Redistribute Payroll between Budget Lines	None	Tue 3/28/2017 8:00 AM	Tue 3/28/2017	Tasks	
Run "Budget Monitor" Report in WVEIS and Clean Up Ledger	None	Tue 3/28/2017 8:00 AM	Tue 3/28/2017	Tasks	
Dis-Encumber and Re-Encumber Payroll	None	Tue 3/28/2017 8:00 AM	Tue 3/28/2017	Tasks	
Submit Budget Supplements & Transfers through WVEIS WOW	None	Tue 3/28/2017 8:00 AM	Tue 3/28/2017	Tasks	
Scholastic's Check	Fri 3/31/2017	Fri 3/31/2017 8:30 AM	Fri 3/31/2017	A/P-Pur...	
check	Fri 3/31/2017	Fri 3/31/2017 8:30 AM	Fri 3/31/2017	A/P-Pur...	
Flag: Due Date: Next Month					
Submit Chief School Business Official Certification Form	None	Sat 4/1/2017 8:00 AM	Sat 4/1/2017	Tasks	
Log Medical Mileage for Previous Month	None	Sat 4/1/2017 8:00 AM	Sat 4/1/2017	Tasks	Personal
Publish Budget Hearing Notice	None	Sat 4/1/2017 8:00 AM	Sat 4/1/2017	Tasks	
Log into 10.172.0.14 to Reset Usage Data for Everyone on Big MFC in Mailro...	None	Sat 4/1/2017 8:00 AM	Sat 4/1/2017	Tasks	
Supplement Miscellaneous Revenues	Sun 4/2/2017	Sun 4/2/2017 8:00 AM	Sun 4/2/2017	Tasks	
Do AJE to Post Municipal Bond Commission Activity for Prior Month	Sun 4/2/2017	Sun 4/2/2017 8:00 AM	Sun 4/2/2017	Tasks	
Charge Indirect Costs for Previous Month	Sun 4/2/2017	Sun 4/2/2017 8:00 AM	Sun 4/2/2017	Tasks	
Reconcile Monthly Ending Budget	None	Sun 4/2/2017 8:00 AM	Sun 4/2/2017	Tasks	
Send Expiring Grant Report to Directors	None	Mon 4/3/2017 8:00 AM	Mon 4/3/2017	Tasks	
Move Expired Grants to Refund Accounts	Tue 4/4/2017	Tue 4/4/2017 8:00 AM	Tue 4/4/2017	Tasks	
Prepare Budget Supplements from Previous Month for Board Approval	Wed 4/5/2017	Wed 4/5/2017 8:00 AM	Wed 4/5/2017	Tasks	
Prepare Budget Transfers from Previous Month for Board Approval	Wed 4/5/2017	Wed 4/5/2017 8:00 AM	Wed 4/5/2017	Tasks	
Send Out Reminder to School Secretaries that Previous Month Financial Rep...	Wed 4/5/2017	Wed 4/5/2017 8:00 AM	Wed 4/5/2017	Tasks	
Balance Bank Statement	None	Thu 4/6/2017 8:00 AM	Thu 4/6/2017	Tasks	
Close Previous Month	Thu 4/6/2017	Thu 4/6/2017 12:00 AM	Thu 4/6/2017	Tasks	
Prepare Previous Month Financial Report for Board	Thu 4/6/2017	Thu 4/6/2017 12:00 AM	Thu 4/6/2017	Tasks	
Close Out Expired Grants & Transfer to Refund Accounts	Sat 4/8/2017	Sat 4/8/2017 8:00 AM	Sat 4/8/2017	Tasks	
Drawdown Cash	Mon 4/10/2017	Mon 4/10/2017 8:00 AM	Mon 4/10/2017	Tasks	
Update Fixed Asset System for Previous Month	Mon 4/10/2017	Mon 4/10/2017 8:00 AM	Mon 4/10/2017	Tasks	
941 Due One Month After End of Quarter	Mon 4/10/2017	Mon 4/10/2017 8:00 AM	Mon 4/10/2017	Tasks	
Clean Up General Ledger	Mon 4/10/2017	Mon 4/10/2017 8:00 AM	Mon 4/10/2017	Tasks	
Dis-Encumber and Re-Encumber Payroll	None	Fri 4/14/2017 8:00 AM	Fri 4/14/2017	Tasks	

Filter applied Reminders: 4 All folders are up to date. Connected to: Microsoft Exchange 100%

Outlook Tasks

- Use Outlook tasks to keep track of deadlines and reoccurring tasks.
- You can create the task or you can flag an email that will create the task with a specified date.
- You can also delegate a task to someone else and Outlook will send the task to the individual and add the task to their own tasks.
- To make a task directly from a received email, click on **Follow Up**, then choose from the dropdown. The Custom will allow you to choose a specific date and time.

The screenshot displays the Microsoft Outlook interface. At the top, the ribbon shows the 'Message' tab selected. Below the ribbon, the 'Follow Up' button is highlighted with a red box. A dropdown menu is open, listing various options for setting a follow-up task, also enclosed in a red box. The email being viewed is from Amanda Huff, dated Thu 3/23/2017 12:28 PM, with the subject '03.28.17 Online Payments'. A PDF attachment titled '03.28.17 Online Payme...' (225 KB) is visible at the bottom left.

03.28.17 Online Payments - Message (HTML)

File Message Developer ADOBE PDF Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward More Meeting

Junk Delete Archive Reply Reply All Forward More Meeting

WVASBO To Manager Done Create New

Team Email Done Create New

Reply & Delete

Rules OneNote Actions

Move Unread Categorize Tags

Follow Up

Translate Find Related Select

Thu 3/23/2017 12:28 PM

Amanda Huff

03.28.17 Online Payments

To Annette Hughart

PDF 03.28.17 Online Payme... 225 KB

Today

Tomorrow

This Week

Next Week

No Date

Custom...

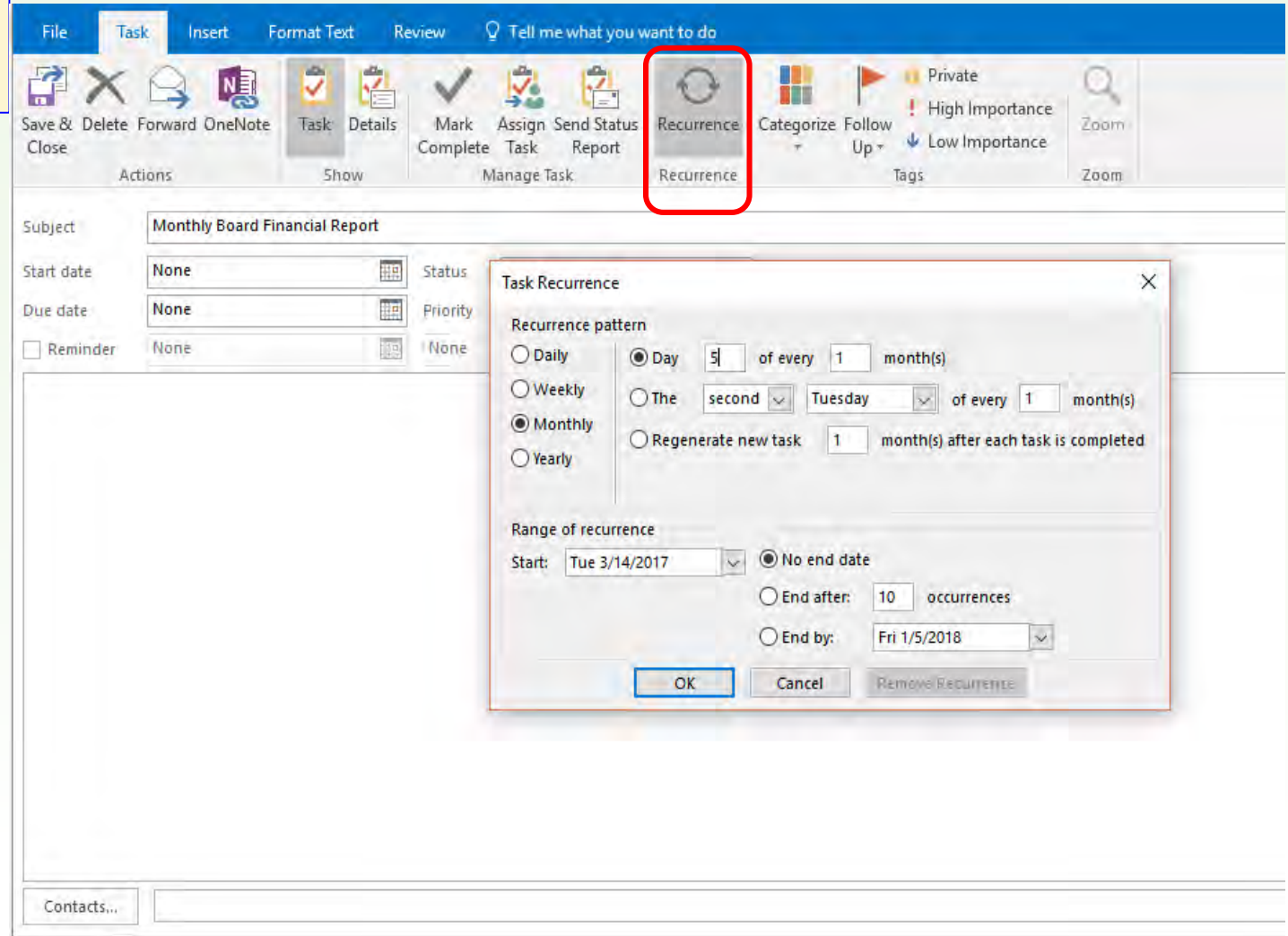
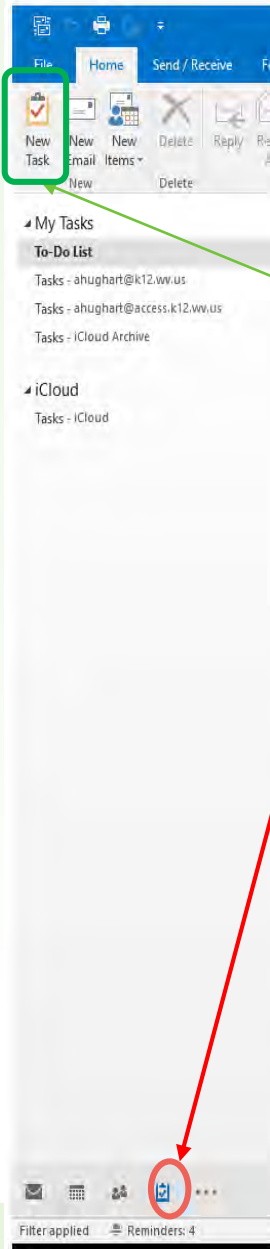
Add Reminder...

Mark Complete

Reoccurring Task

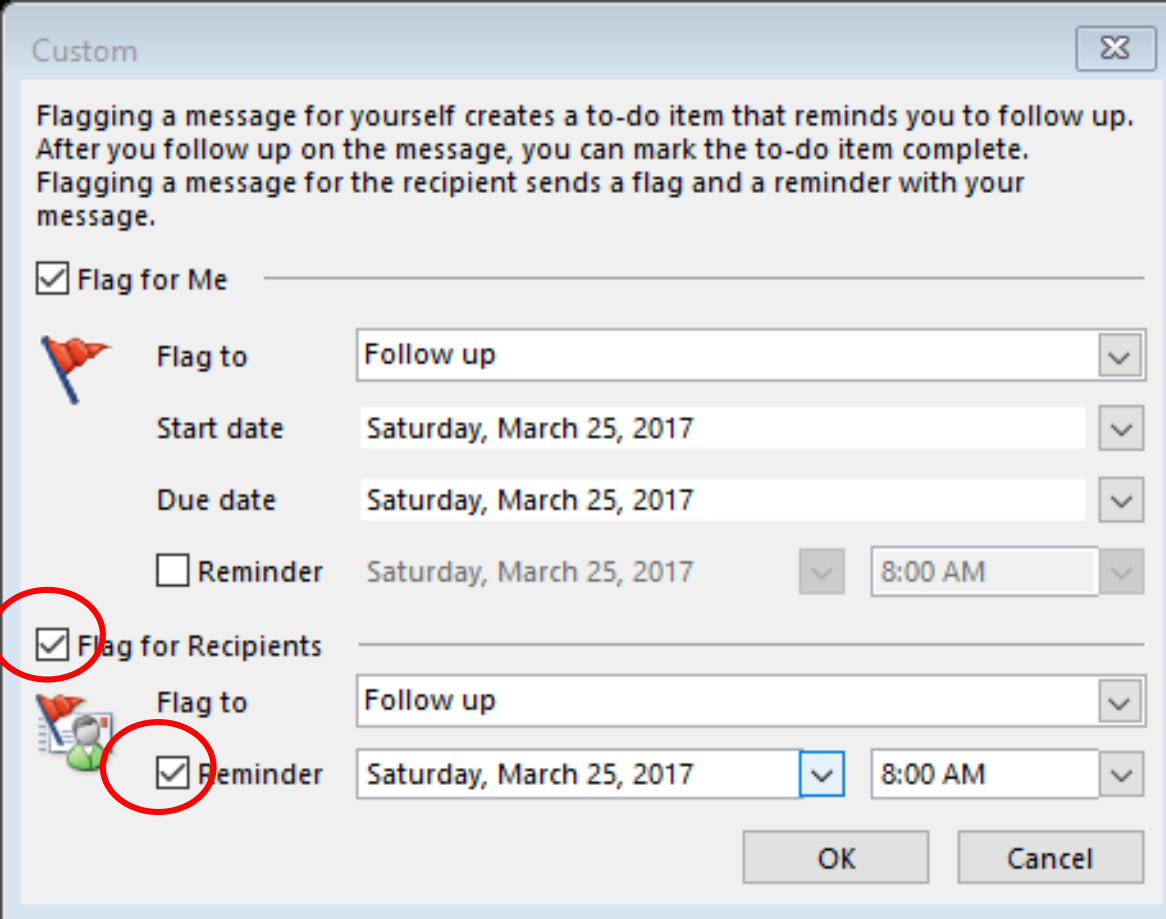
Click on **Tasks** icon at bottom

Click on "New Task"



Assign a Task to Someone Else


- You can delegate or assign a task to someone else by forwarding (or replying) to an email to the individual and under the **Follow-Up tab** choose **Custom**, then click the box for **Flag for Recipients**. Click **Reminder** for you or the person that you are assigning the task to for Outlook to remind them on a certain date and time.



Custom

Flagging a message for yourself creates a to-do item that reminds you to follow up. After you follow up on the message, you can mark the to-do item complete. Flagging a message for the recipient sends a flag and a reminder with your message.

Flag for Me


 Flag to Follow up

Start date Saturday, March 25, 2017

Due date Saturday, March 25, 2017

Reminder Saturday, March 25, 2017 8:00 AM

Flag for Recipients

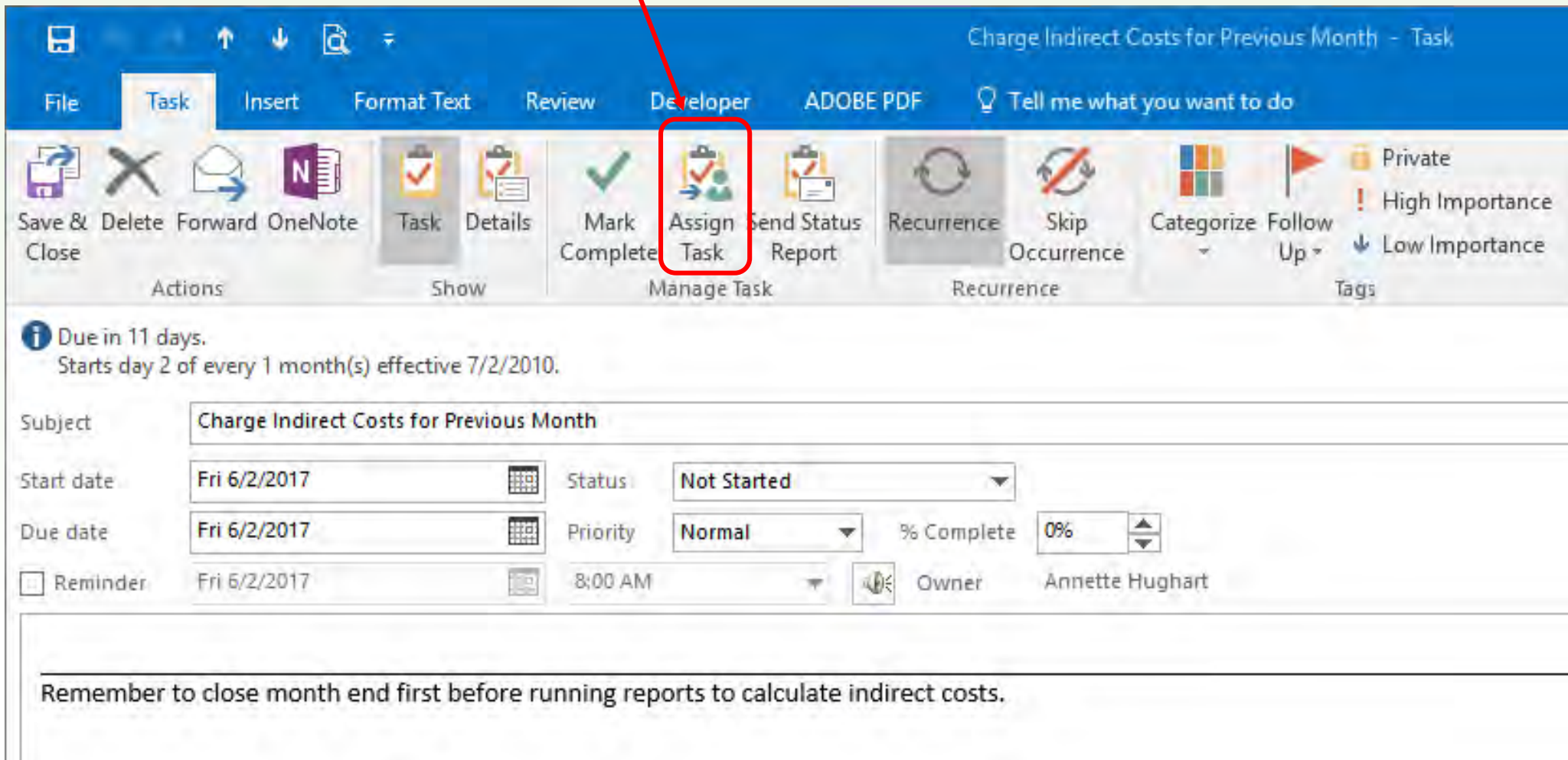
 Flag to Follow up

Reminder Saturday, March 25, 2017 8:00 AM

OK Cancel

Assign a Task to Someone Else (contd.)

- You can also assign a task that is currently in your task list to someone else.
- Open the task pane, click **Assign Task**, fill in the email address and click Send.

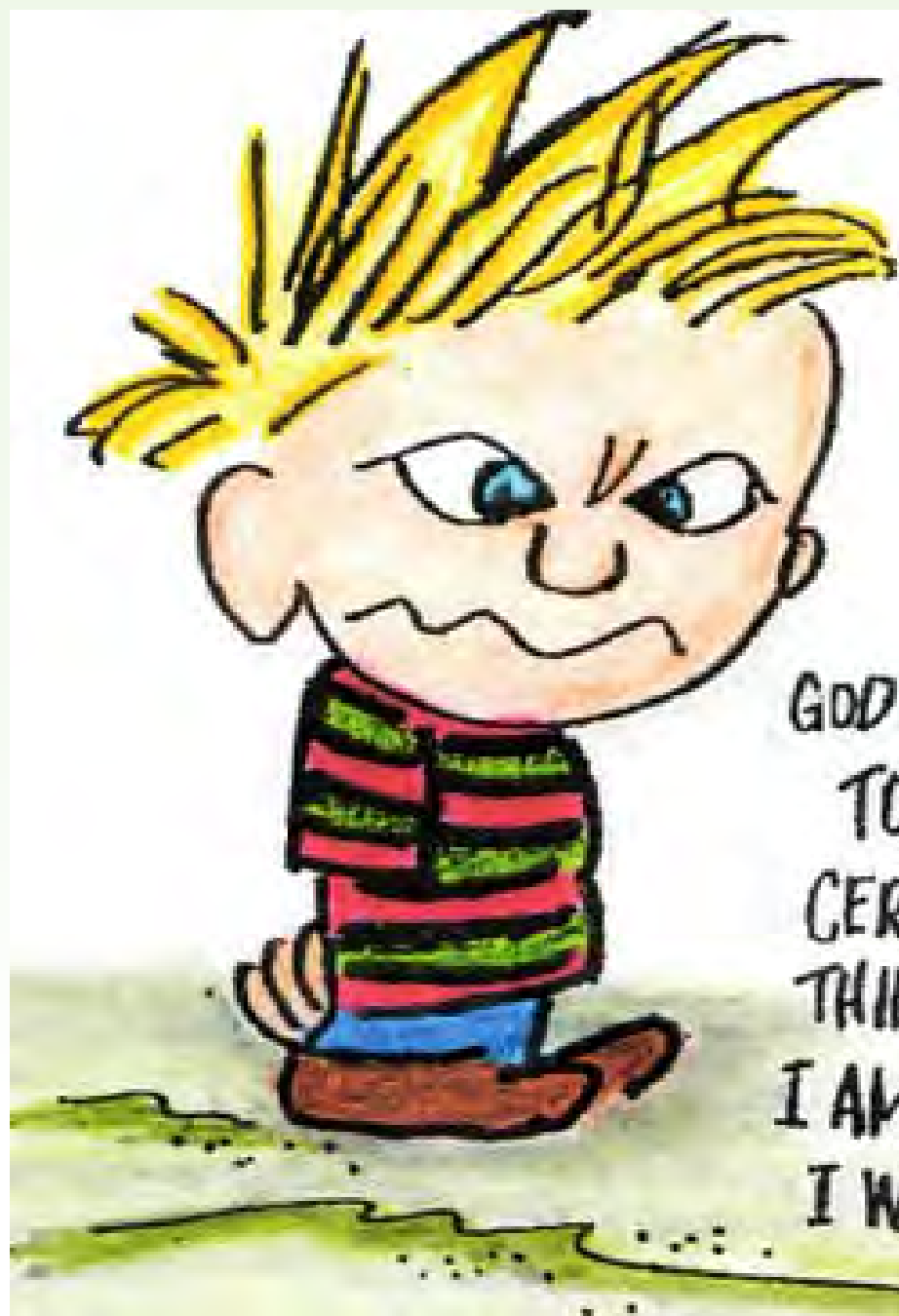


The screenshot shows the Outlook task pane for a task titled "Charge Indirect Costs for Previous Month". The ribbon is set to "Task", and the "Assign Task" button is highlighted with a red box and a red arrow. The task details are as follows:

Subject	Charge Indirect Costs for Previous Month				
Start date	Fri 6/2/2017	Status	Not Started		
Due date	Fri 6/2/2017	Priority	Normal	% Complete	0%
Reminder	Fri 6/2/2017	8:00 AM	Owner	Annette Hughart	

Additional information: Due in 11 days. Starts day 2 of every 1 month(s) effective 7/2/2010.

Remember to close month end first before running reports to calculate indirect costs.

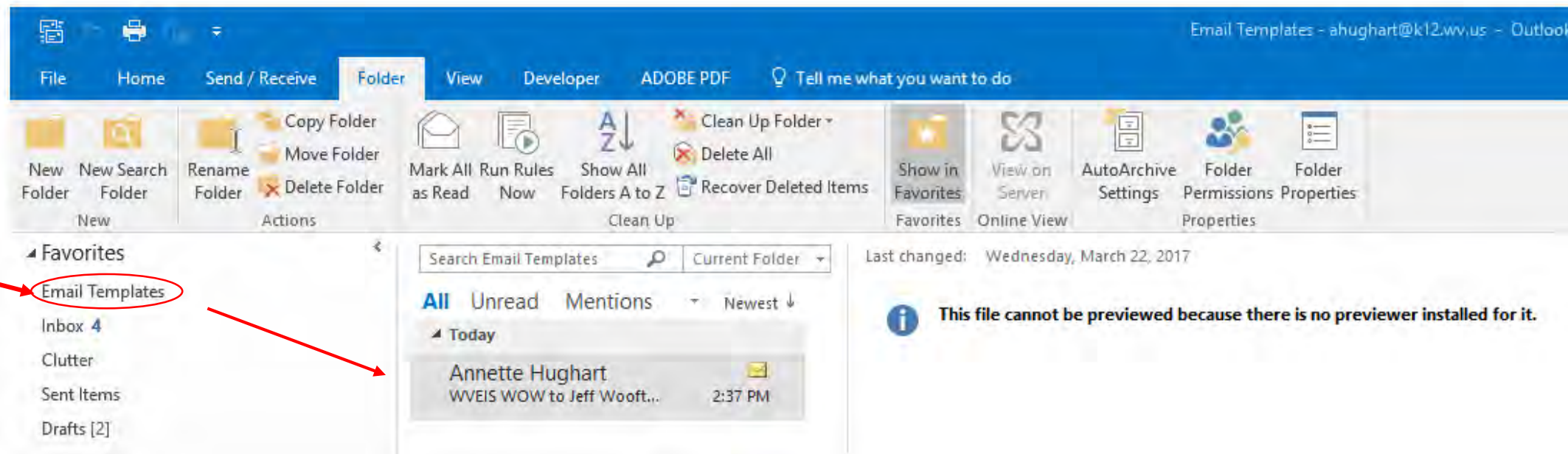


GOD PUT ME ON EARTH
TO ACCOMPLISH A
CERTAIN NUMBER OF
THINGS, RIGHT NOW
I AM SO FAR BEHIND,
I WILL NEVER DIE.

Email Templates

- Many of us send repetitive emails. To save time create email templates. This saves time; every second counts.
- Save your email templates in an Outlook folder in your Favorites for easy access.
- To use your email templates, click on the folder and then double click on the email that you want to use; this will open the email. If no changes need made just hit send. DONE! And you didn't have to type the email!
- Instructions on next page to set-up.

Set-Up Email Template folder under Favorites for easy access



Create an email template

1. Start a new message in Outlook (keyboard shortcut Ctrl+Shift+M)
2. Fill out the subject and the body of the email
3. Go to FILE backstage and choose Save As
4. Save the message as a template
 1. Note that Outlook will automatically switch you to the default Templates location. You can save the template there - just note the path so you can navigate to it in a later step
 2. Alternatively, you may save the template to a different location that's easier to find than then Outlook templates location
5. Create a new folder in your Outlook mail tree to hold the new template (Email Templates, for example)
 1. Note that this step is different from what Microsoft guidance recommends. Microsoft stops at step 4.1 above, and provides a different procedure for using the template. I find this procedure unnecessarily complicated, requiring many clicks to execute. My process is much simpler!
6. Navigate, in Windows Explorer, to the location you noted in step 4.1 or 4.2 above
7. Drag the OFT template file to the new folder created in step 5

Use the email template

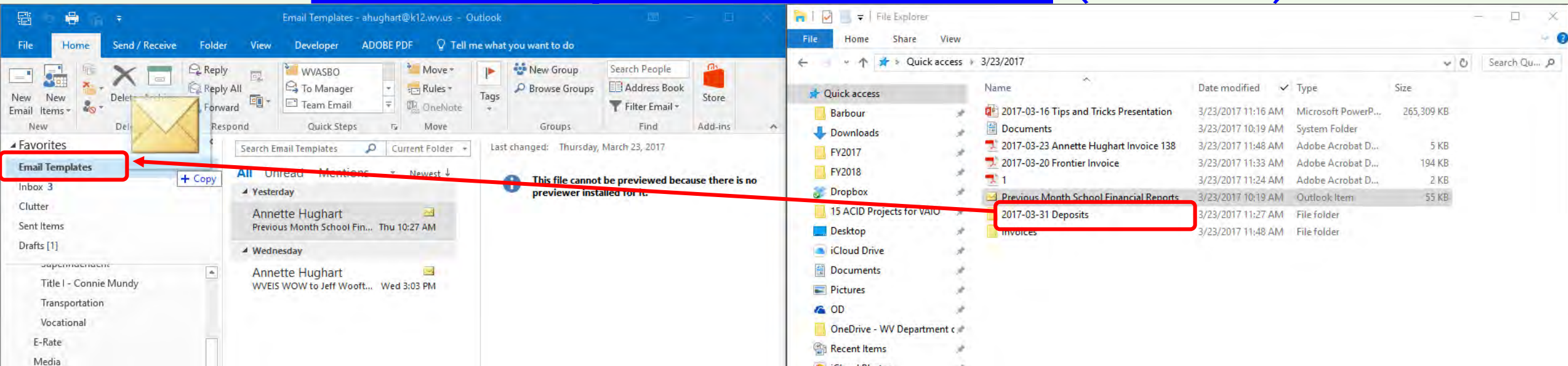
1. Navigate to the Email Templates folder created in step 5 of Create an email template
2. Open the template (you may be prompted to confirm that you want to open this type of file)
3. Modify the text as needed, add email recipients
 1. Note that modifying the body of the message or its subject will not change the underlying template. To modify the template, follow steps outlined in Create an email template above
4. Click on Send to send the message

Email Template Instructions



See next slide for screen shot of how to drag this file

Email Template Instructions (contd.)



- This is the path that Microsoft Outlook 2016 will probably use to save the email template.
- C:\Users\ahughart\AppData\Roaming\Microsoft\Templates
- You may want to choose another location to save the template.

Email Template

This is my
email
template
opened

The screenshot shows the Microsoft Outlook interface with the 'Message' ribbon selected. The email header shows the sender as 'ahughart@k12.wv.us' and the recipient as 'Jeffrey P. Woofter (jwoofter@k12.wv.us)'. The subject is 'WVEIS WOW'. The body of the email contains the following text:

Jeff,

Please log into WVEIS WOW and approve the grant(s) that I have processed.

Thanks,

Annette Hughart, CPA
Chief School Business Official/Treasurer
Barbour County Board of Education
45 School St
Philippi, WV 26416
(304) 457-3030 ext. 134
ahughart@k12.wv.us

A red oval highlights the signature block, and a red arrow points from a note box to it.

NOTE: If you have your email set to automatically include your Name, Address, etc. make sure it is **NOT** on the template when you save it since Outlook will add it when you open the email template.

Task Plus Email Template with Formulas in Email for Text and Calculated Dates

- This is my reoccurring task for a monthly email to our school secretaries to remind them that their previous month financial reports are due to me by the 10th of the month or the first business day thereafter.

The screenshot displays the Microsoft Task Manager interface for a recurring task. The task is titled "Send Out Reminder to School Secretaries that Previous Month Financial Reports are Due on the 10th". It is set to recur every 1 month starting on 5/5/2016. The start and due dates are both set to Mon 6/5/2017. The task status is "Not Started", priority is "Normal", and it is due at 8:00 AM. The owner is Annette Hughart. An email template attachment is visible at the bottom left, titled "Previous Month School Financia...".

Subject	Send Out Reminder to School Secretaries that Previous Month Financial Reports are Due on the 10th		
Start date	Mon 6/5/2017	Status	Not Started
Due date	Mon 6/5/2017	Priority	Normal
Reminder	Mon 6/5/2017	8:00 AM	0%
Owner	Annette Hughart		

Notice there is an attached item; this is an Email Template

Task Plus Email Template with Formulas in Email for Text and Calculated Dates (contd.)

- You can attach just about anything to a task.
- While in the Task go to Insert and choose the type of item you want to insert: File, Outlook Item (can be an Email Template), business card, etc.
- This example is to attach an Email Template.
- Go to **Insert**, then **Outlook Item**:

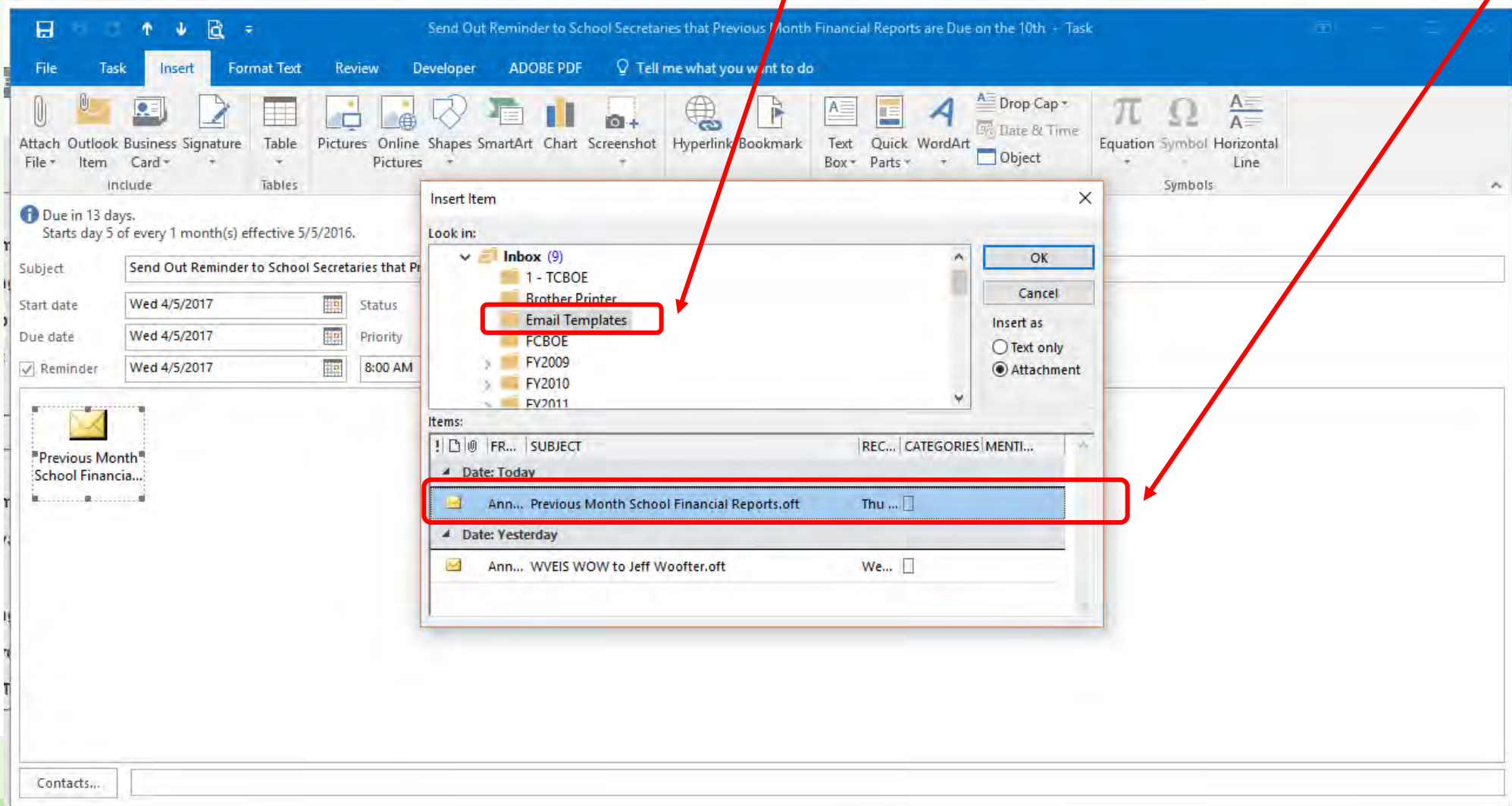
The screenshot shows the Microsoft Office ribbon with the 'Insert' tab selected. The 'Outlook Item' option is highlighted with a red box. Below the ribbon, a 'Task Pan' box is shown with an arrow pointing to the task details. The task details include:

- Due in 13 days.** Starts day 5 of every 1 month(s) effective 5/5/2016.
- Subject:** Send Out Reminder to School Secretaries that Previous Month Financial Reports are Due on the 10th
- Start date:** Wed 4/5/2017
- Due date:** Wed 4/5/2017
- Reminder:** Wed 4/5/2017
- Status:** Not Started
- Priority:** Normal
- % Complete:** 0%
- 8:00 AM** (notification icon)
- Owner:** Annette Hughart

Below the task details, there is an email icon and the text 'Previous Month School Financia...'

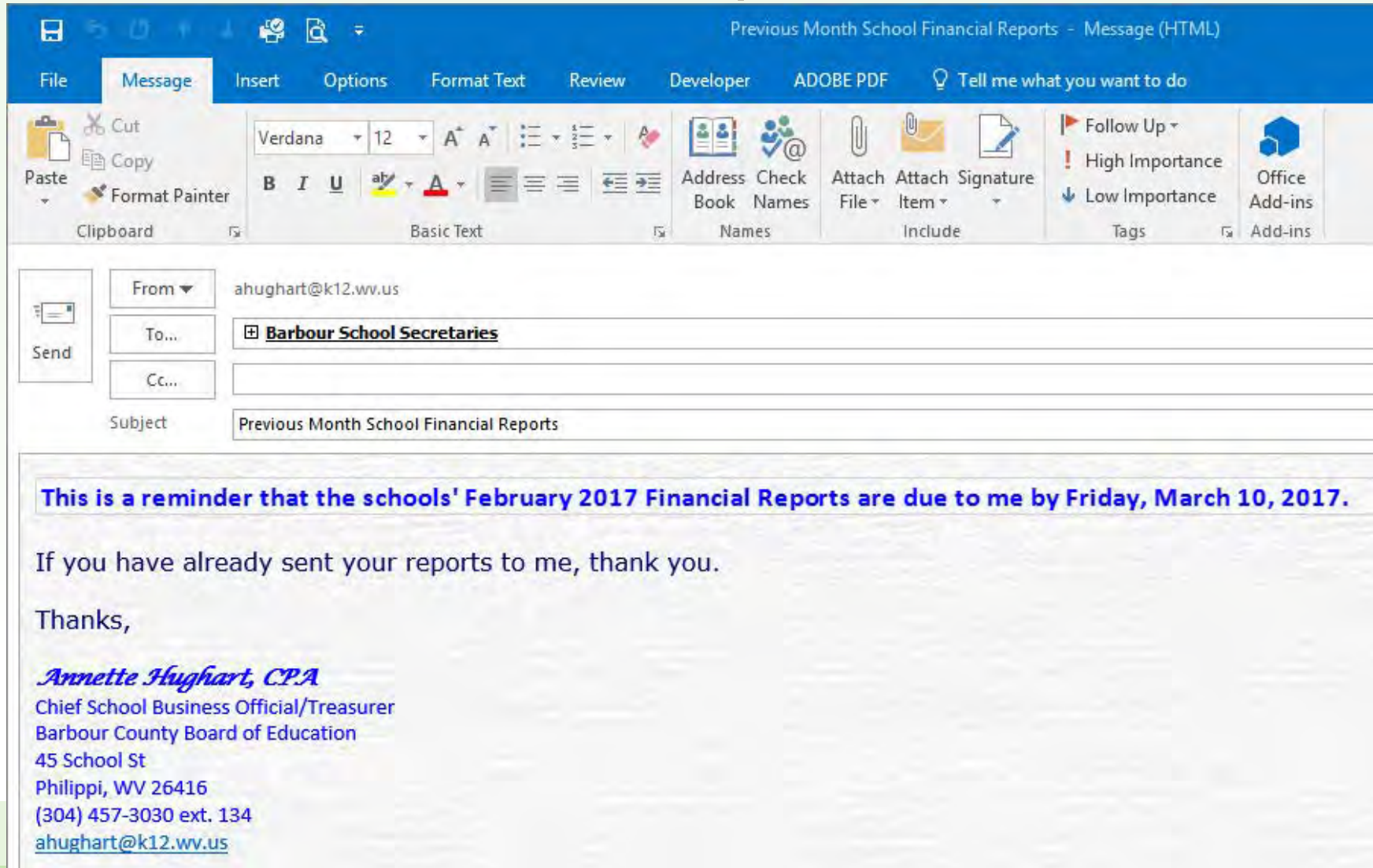
Task Plus Email Template with Formulas in Email for Text and Calculated Dates (contd.)

- This is the screen that opens. Find your Email Templates and choose the Email Template that you want to attach and click OK.



Task Plus Email Template with Formulas in Email for Text and Calculated Dates (contd.)

- This is the attached **Email Template** that I created and is my Outlook Email

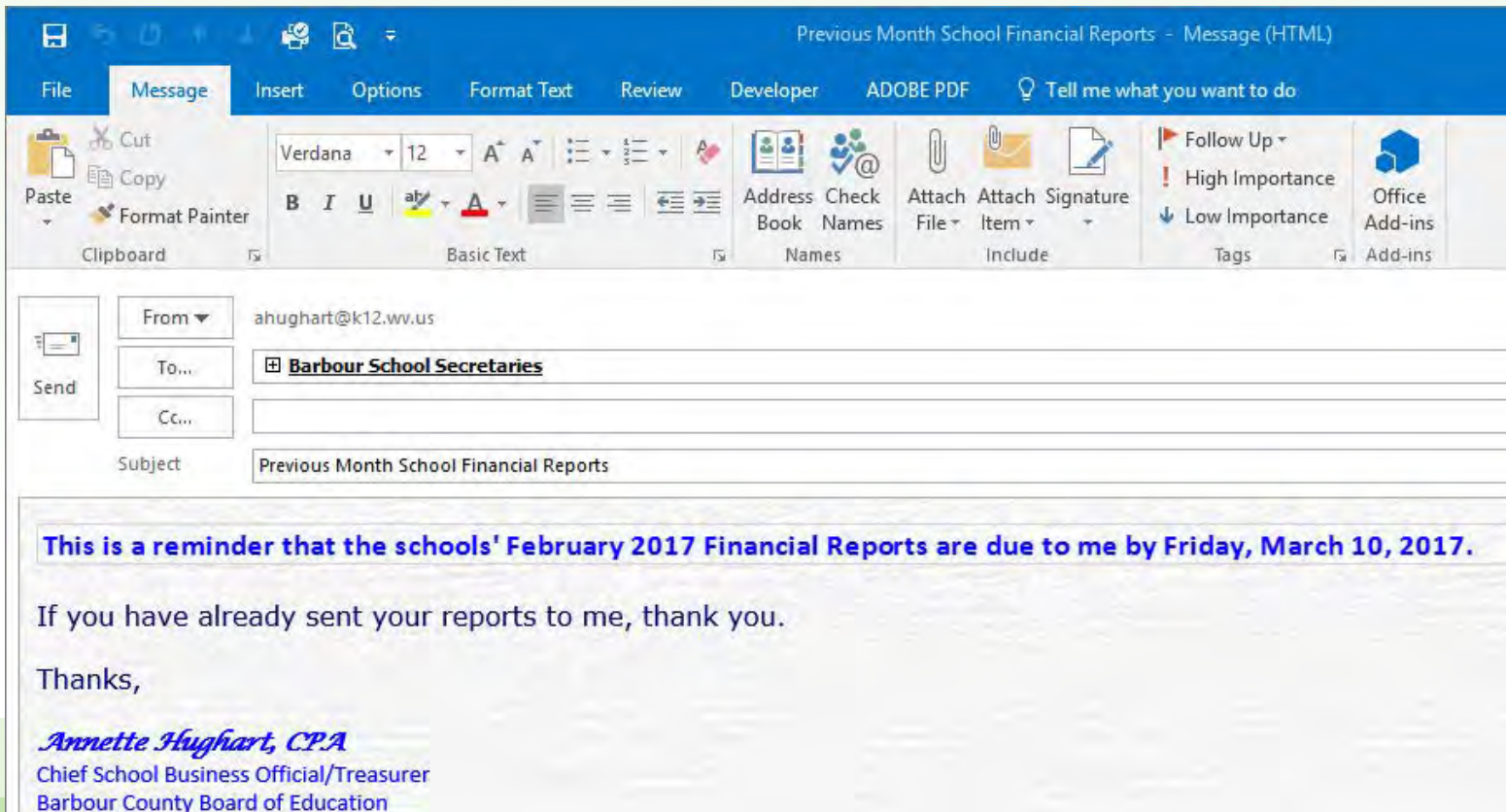


The screenshot shows an Outlook email interface with the following details:

- Title Bar:** Previous Month School Financial Reports - Message (HTML)
- Menu Bar:** File, Message, Insert, Options, Format Text, Review, Developer, ADOBE PDF, Tell me what you want to do
- Ribbon:** Includes groups for Clipboard (Paste, Copy, Format Painter), Basic Text (Font face: Verdana, size: 12, bold, italic, underline, text color, background color, bullet points, numbered list, indent, outdent), Names (Address Book, Check Names), Include (Attach File, Attach Item, Signature), Tags (Follow Up, High Importance, Low Importance), and Add-ins (Office Add-ins).
- Header Fields:**
 - From:** ahughart@k12.wv.us
 - To:** Barbour School Secretaries
 - Cc:** (empty)
 - Subject:** Previous Month School Financial Reports
- Body Content:**
 - A blue-bordered box containing the text: **This is a reminder that the schools' February 2017 Financial Reports are due to me by Friday, March 10, 2017.**
 - A paragraph: If you have already sent your reports to me, thank you.
 - A closing: Thanks,
 - A signature block for **Annette Hughart, CPA**, Chief School Business Official/Treasurer, Barbour County Board of Education, 45 School St, Philippi, WV 26416, (304) 457-3030 ext. 134, and email ahughart@k12.wv.us.

Task Plus Email Template with Formulas in Email for Text and Calculated Dates (contd.)

- When it is time to perform the task, open the task window and double click the attachment (this will be your Email Template that opens), make any needed changes and hit send. DONE!
- But wait we can take this a step further. In your Email Template you can insert an Excel worksheet for calculations and text.
- Again this is my Email Template that I attached to the Task:



Notice this line looks like text but it is an Excel spreadsheet with a formula for the text and automatically calculates the first business day that is after the 9th of the current month

Task Plus Email Template with Formulas in Email for Text and Calculated Dates (contd.)

Previous Month School Financial Reports - Message (HTML)

File

Home Insert Page Layout Formulas Data Review View Developer Inquire ACROBAT New Tab Tell me what you want to do Share

Calibri 14 A A Wrap Text General

Conditional Formatting Format as Table Cell Styles Insert Delete Format

AutoSum Fill Clear Sort & Find & Filter Select

A1 = "This is a reminder that the schools' " &TEXT(EOMONTH(TODAY(),-2)+1,"mmmm yyyy") &" Financial Reports are due to me by " &TEXT((DATE(YEAR(NOW()), MONTH(NOW()),10)+CHOOSE(WEEKDAY(DATE(YEAR(NOW()),MONTH(NOW()),10),2),0,0,0,0,0,2,1)),"dddd, mmmm dd, yyyy") &". "

From ahughart@k12.wv.us

To Barbour School Secretaries

Cc

Subject Previous Month School Financial Reports

This is a reminder that the schools' February 2017 Financial Reports are due to me by Friday, March 10, 2017.

Sheet1

Thanks,

Annette Hughart, CPA
Chief School Business Official/Treasurer
Barbour County Board of Education
45 School St
Philippi, WV 26416
(304) 457-3030 ext. 134
ahughart@k12.wv.us

Dates will automatically update based on the formula when the Email Template is opened and you double click on the Excel portion.

Email Formula

- A Concatenate formula will allow you to string multiple fields of text together but will not allow you to imbed formulas with the text strings.
- Let's take a look at that Excel formula a little more closely.
- This is an interesting formula that will allow you to string text and formulas together. The text sections are in quotes, then to join each section there is a SPACE and an & sign together.

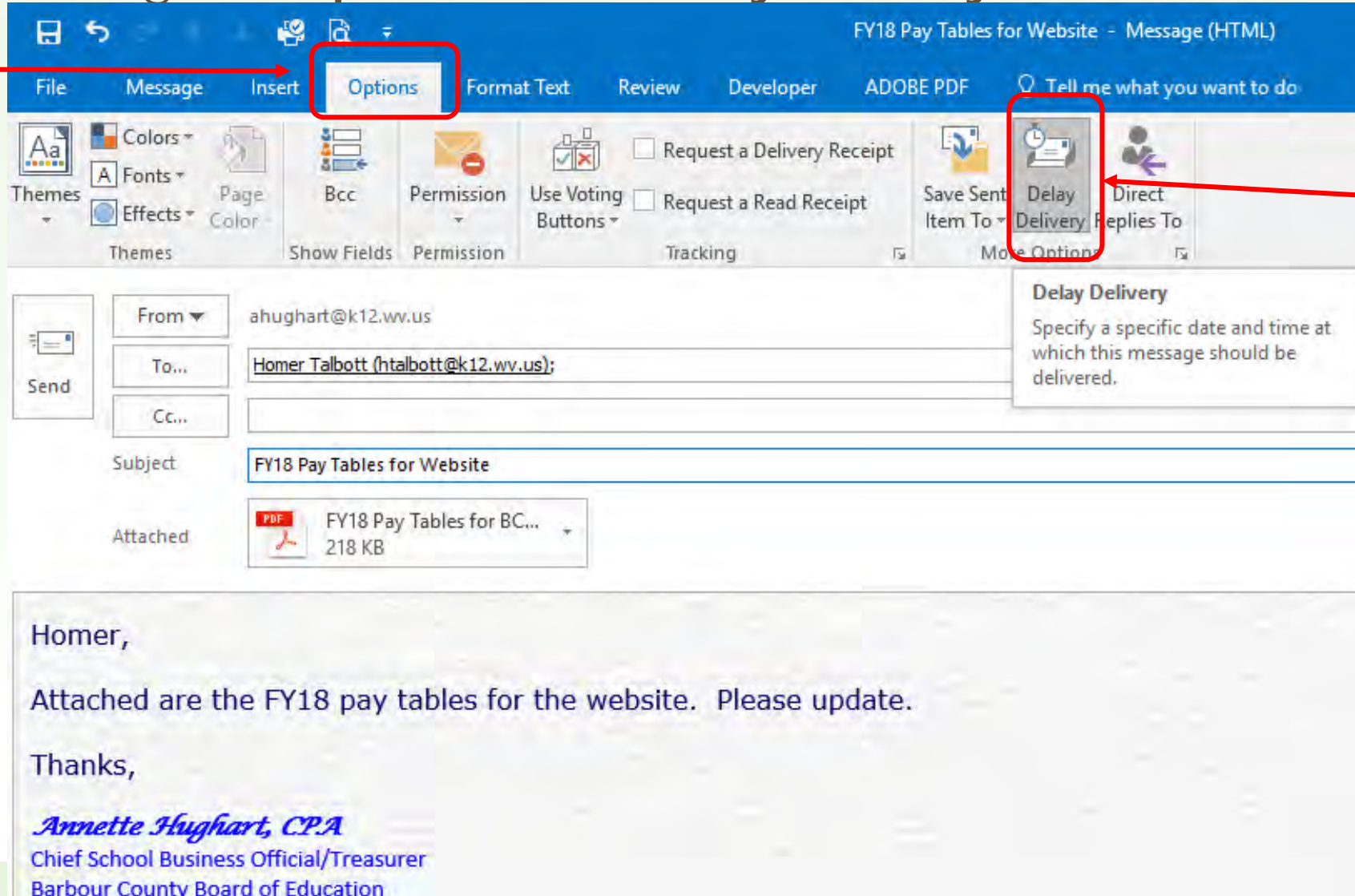
• ="This is a reminder that the schools' "&TEXT(EOMONTH(TODAY(),-2)+1,"mmmm yyyy")&"
Financial Reports are due to me by "
&TEXT((DATE(YEAR(NOW()),MONTH(NOW()),10)+CHOOSE(WEEKDAY(DATE(YEAR(NOW()),MON
TH(NOW()),10),2),0,0,0,0,0,2,1)),"dddd, mmmm dd, yyyy")&"."

See the SPACE& together?

- The formula populates in the email as:
 - This is a reminder that the schools' February 2017 Financial Reports are due to me by Friday, March 10, 2017.
- **Again when the email template is opened, all of the date references update automatically based on the current date.**

Compose an Email to Send at a Future Date

- Compose an email and set it to send at a future date and time. In your email, go to **Options**, then **Delay Delivery**.



The screenshot shows the Microsoft Word interface for composing an email. The title bar reads "FY18 Pay Tables for Website - Message (HTML)". The ribbon includes "File", "Message", "Insert", "Options", "Format Text", "Review", "Developer", "ADOBE PDF", and "Tell me what you want to do". The "Options" tab is active, and the "Delay Delivery" icon (a clock with a document) is highlighted with a red box and a red arrow. A tooltip for "Delay Delivery" is visible, stating: "Specify a specific date and time at which this message should be delivered." The email header shows the sender as "ahughart@k12.wv.us", the recipient as "Homer Talbott (htalbott@k12.wv.us)", and the subject as "FY18 Pay Tables for Website". An attached PDF file named "FY18 Pay Tables for BC..." (218 KB) is listed. The email body contains the following text:

Homer,

Attached are the FY18 pay tables for the website. Please update.

Thanks,

Annette Hughart, CPA
Chief School Business Official/Treasurer
Barbour County Board of Education

Compose an Email to Send at a Future Date (contd.)

- When you click on **Delivery Delay**, a **Properties** box pops up. Now select the date and time for the email to be delivered.

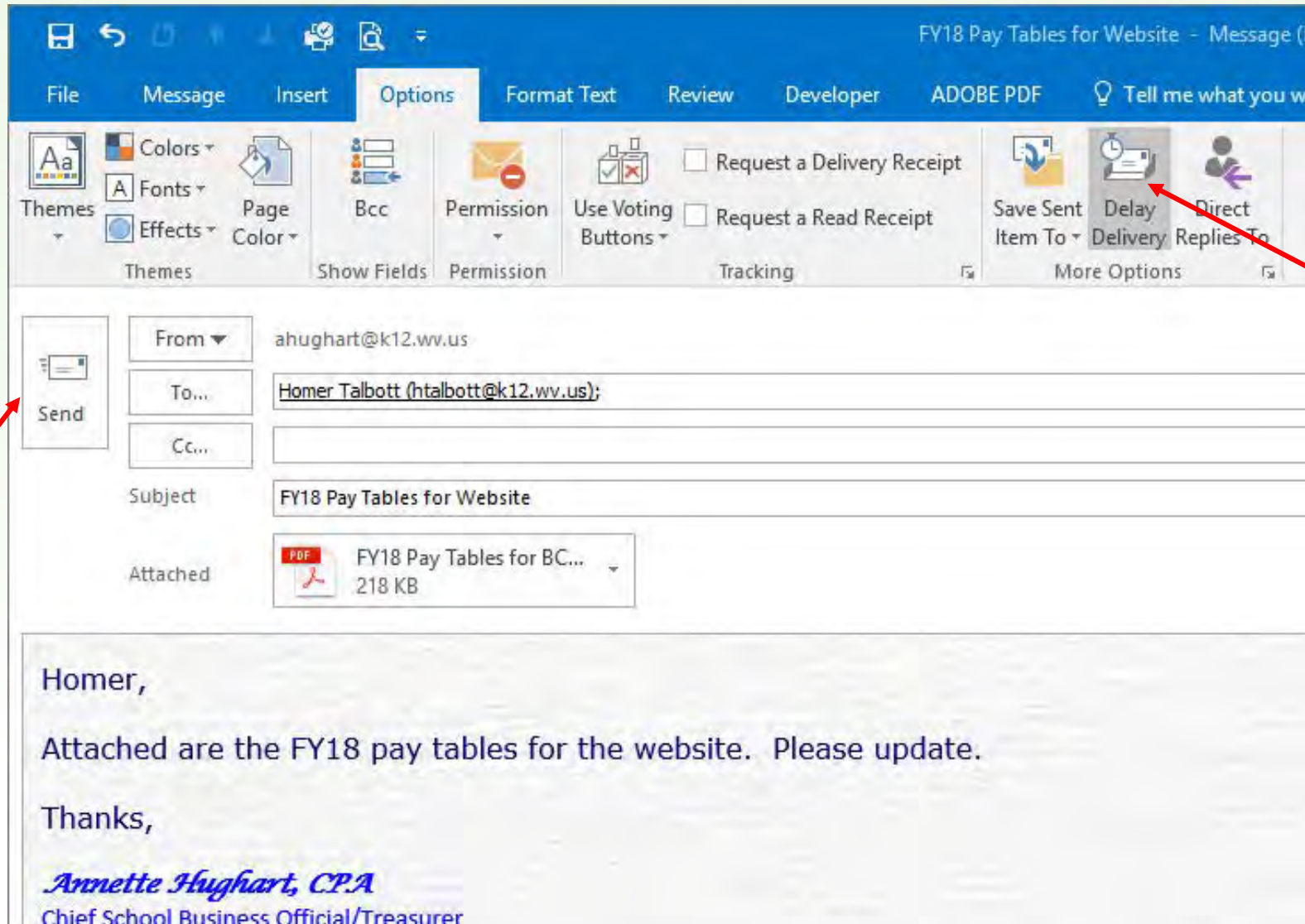
The screenshot shows the 'Properties' dialog box with the following sections and options:

- Settings:** Importance: Normal, Sensitivity: Normal, Do not AutoArchive this item:
- Security:** Change security settings for this message. Security Settings... button.
- Voting and Tracking options:** Use voting buttons: ; Request a delivery receipt for this message: ; Request a read receipt for this message:
- Delivery options:** Have replies sent to: ; Do not deliver before: 7/1/2017 8:00 AM; Expires after: None 12:00 AM; Save copy of sent message:
- Contacts...** and **Categories** dropdown menu (set to None).
- Close** button at the bottom right.

Click Close

Compose an Email to Send at a Future Date (contd.)

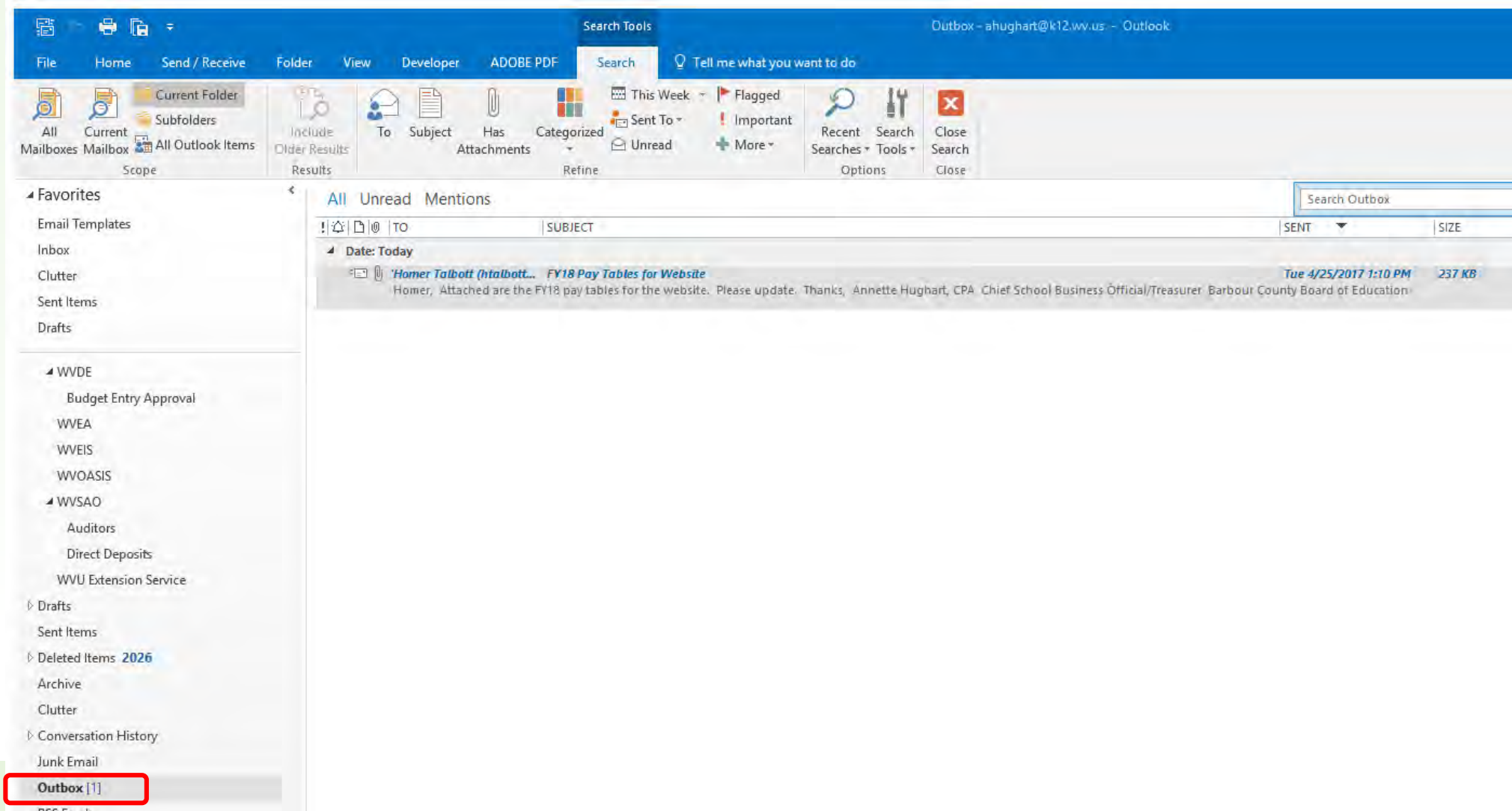
- Now click Send on your email.



Delay Deliver box becomes greyed when Properties have been saved.

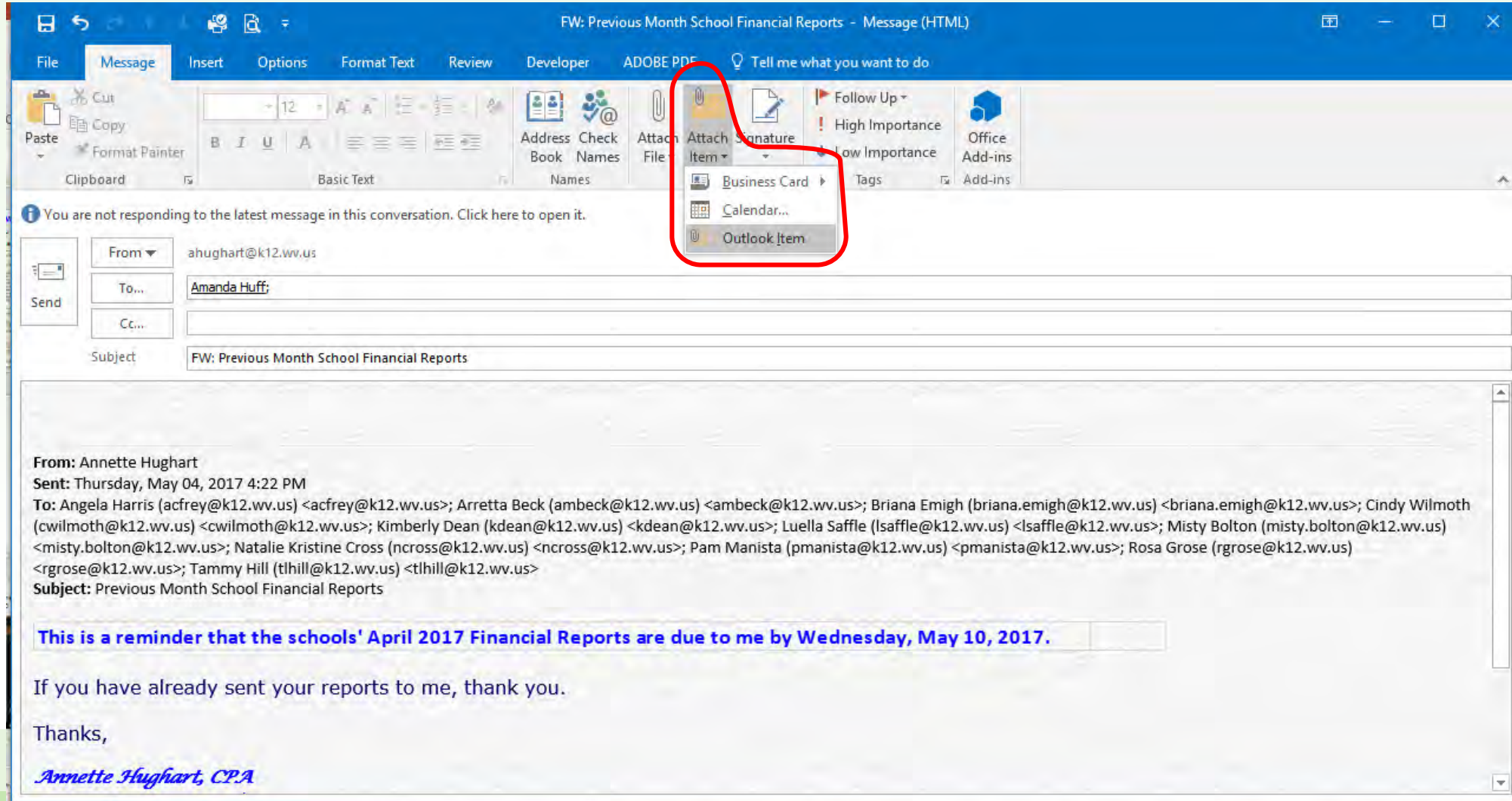
How to Find an Email Set to Send in the Future

- Emails set to deliver in the future, appear in your **Outbox**. So you can easily see if you have already created the email or if you need to reopen the email to make changes before Outlook sends the email.



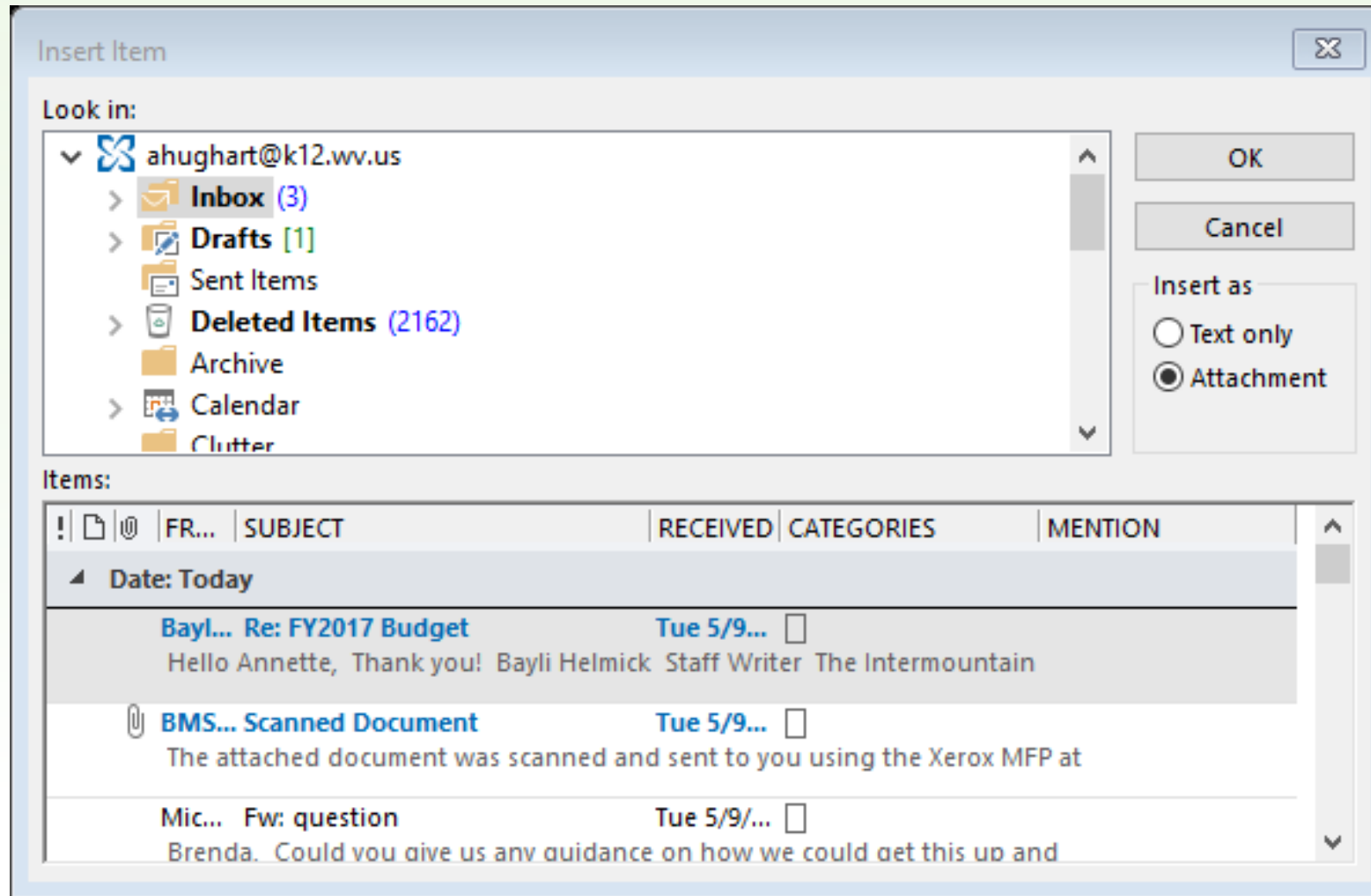
To a New Email, Attach a Previous Email

- In a new message, select **Attach Item**.
- Choose **Outlook Item**.
- Then find and select the email to attach.



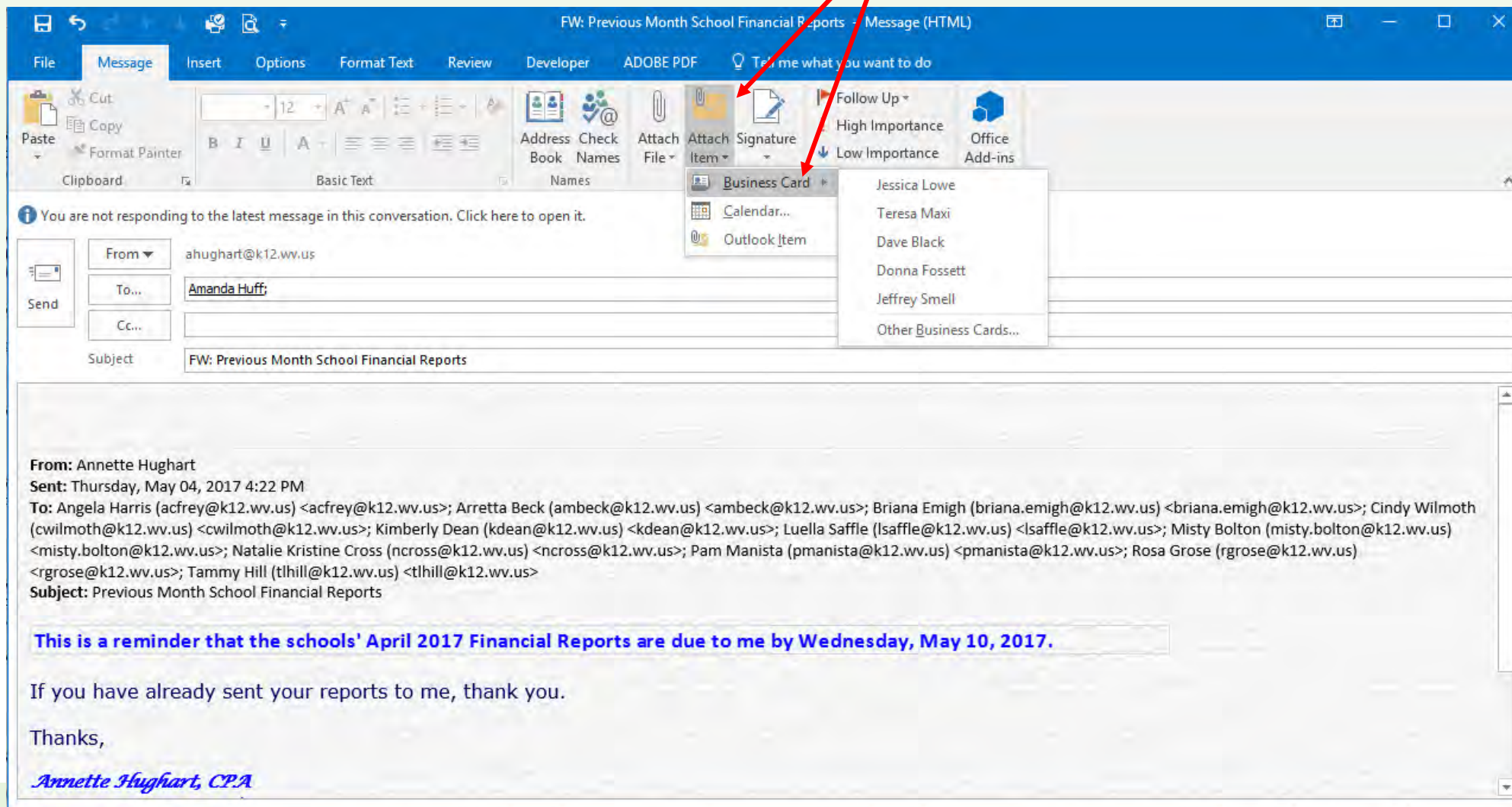
To a New Email, Attach a Previous Email (contd.)

- Find the email to insert.



To a New Email, Attach a Business Card

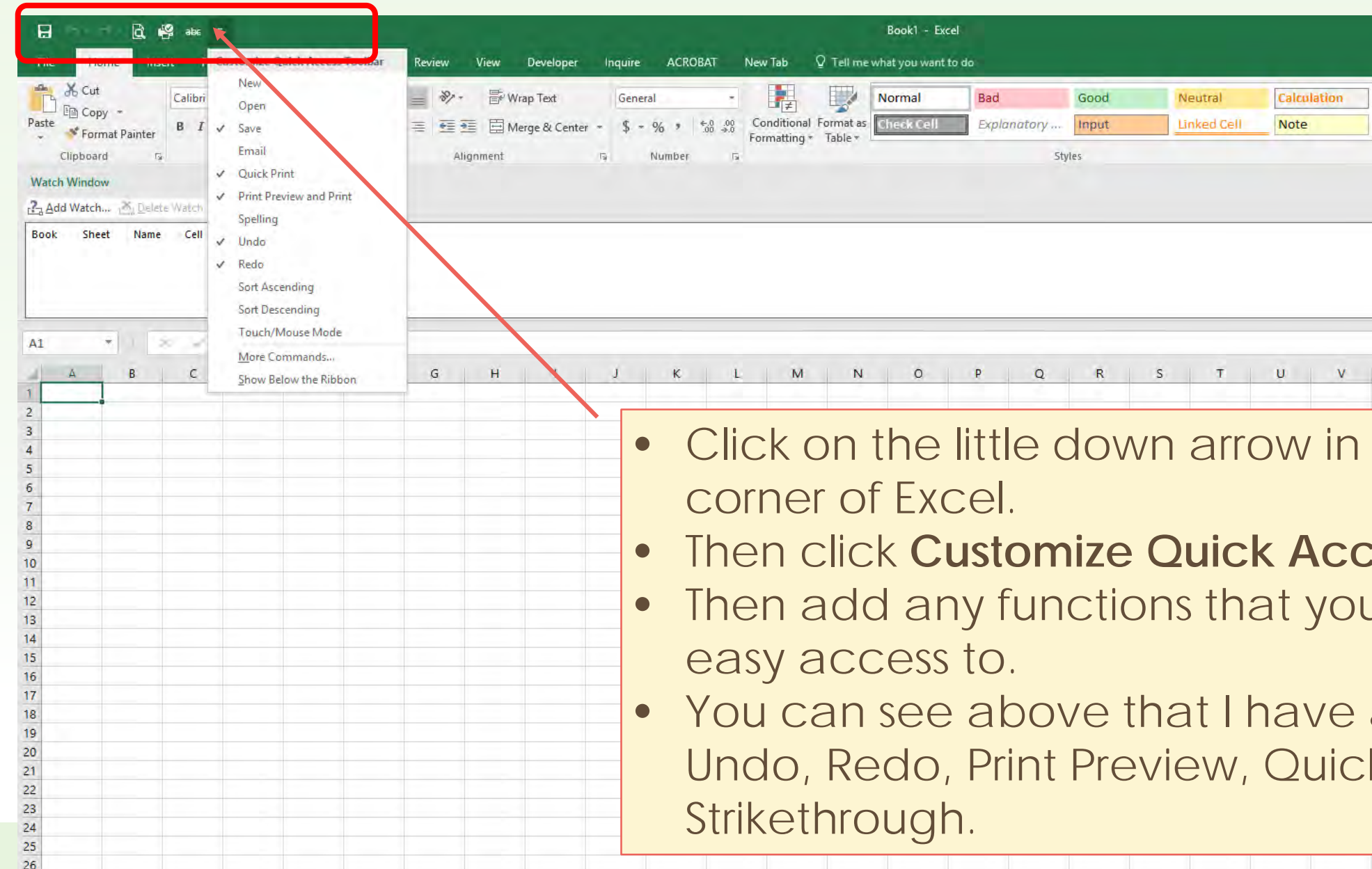
- If you have your contacts set-up in Outlook, you can attach a business card to an email to send to someone else.



Excel 2016 Shortcuts Listing

- This is a link for all 253 Excel 2016 Shortcuts
<https://shortcutworld.com/export.pdf?id=bc6RIDKUj9iZOphpSBQiOhHqnRpo8PNkAb2fLmg%2BczQ%3D>
- The listing is more than you will ever use but some are handy.
- Strikethrough is something I use frequently. Did you know that **Control+5** will **strikethrough or un-strikethrough**?

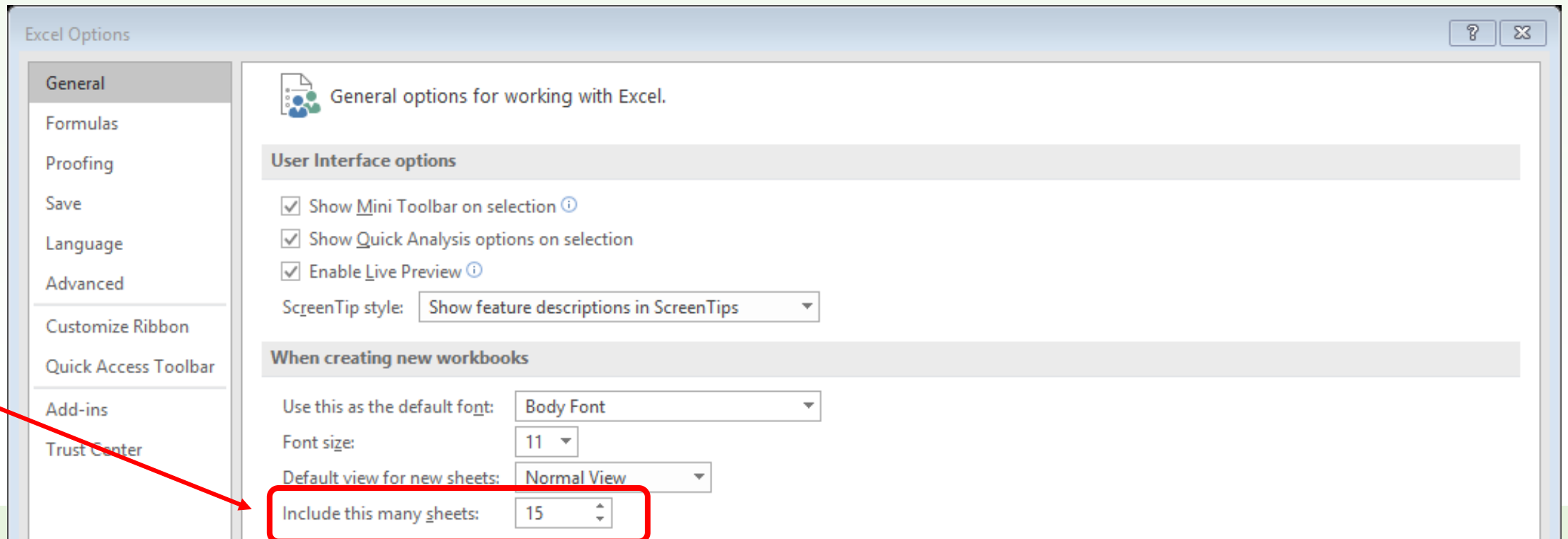
Customize Excel Quick Access Toolbar



- Click on the little down arrow in the top left corner of Excel.
- Then click **Customize Quick Access Toolbar**.
- Then add any functions that you may want easy access to.
- You can see above that I have added Save, Undo, Redo, Print Preview, Quick Print and Strikethrough.

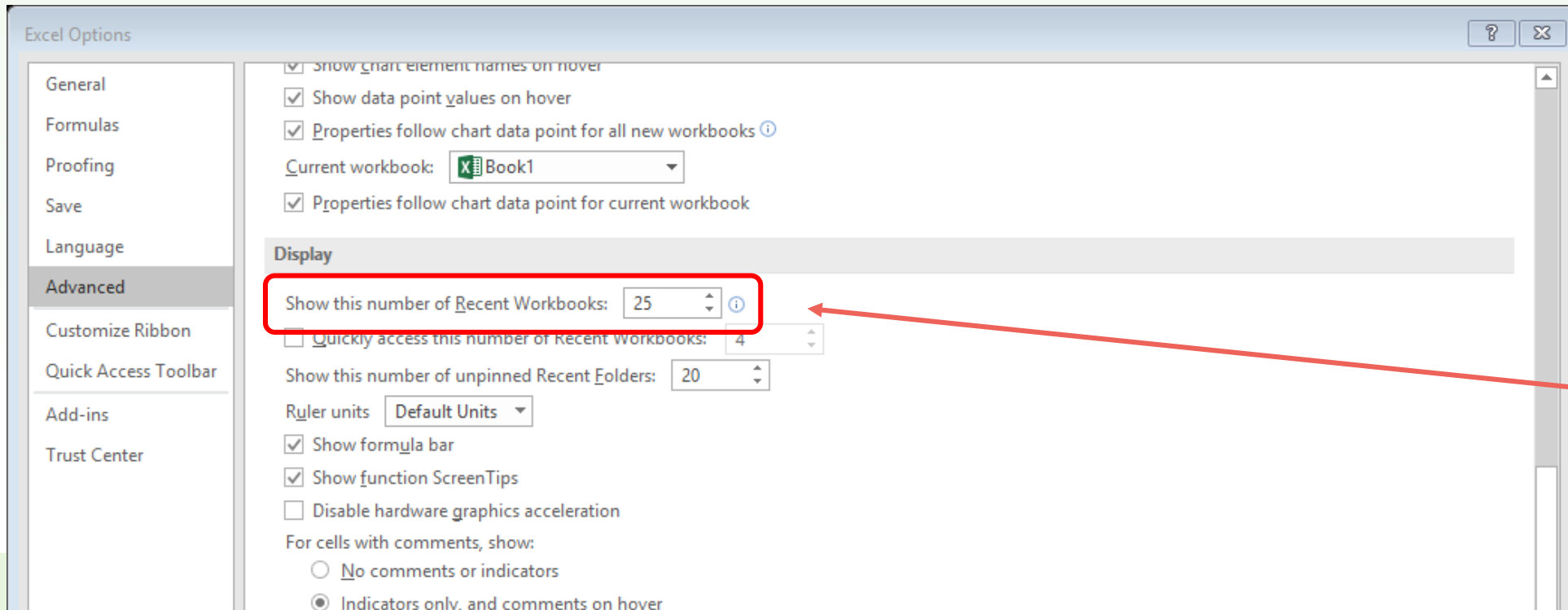
Excel Number of Default Sheets in New Files

- Excel, I think, defaults new files to only have 3 sheets.
- Sometimes you need more sheets than 3. So to save time and keystrokes change the default for number of sheets in new files. If you don't use all of the sheets in a new file, it doesn't matter.
- You can change the number of Default Sheets in new files under **Excel Options, General, "When creating new workbooks"**, then in the field "**Include this many sheets:**" change the number. I have mine default to 15.



Excel Listing of Recent Files

- In Excel you can see a listing of recently used files by using ALT+F or clicking on File in the top left of the screen.
- Excel defaults to a low number of recent files to display.
- You can change the number of recent files to display by clicking on **File**, then **Excel Options**, then **Advanced**, under the **Display** section change “**Show this number of Recent Workbooks:**” I have mine set to 25. It saves time.
- If you have ever saved a file and then can't find it, this may help so that you can open the file and save it in the correct location.



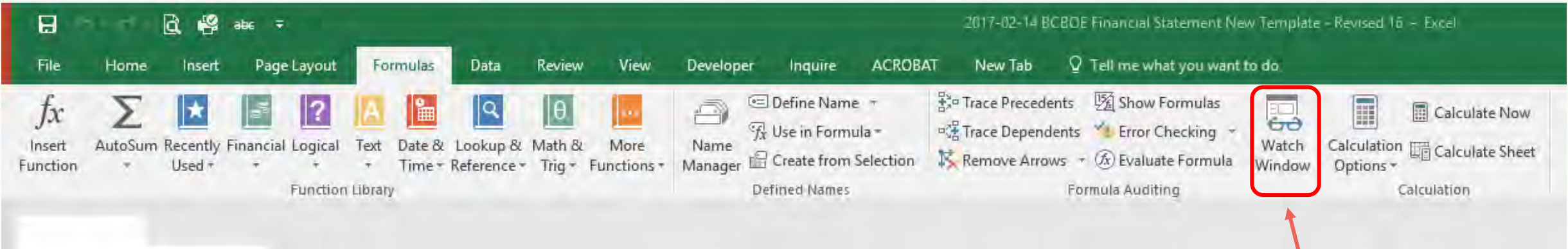
Excel Listing of Recent Files Screenshot

The screenshot shows the 'Open' dialog in Microsoft Excel. The left sidebar contains navigation options: Info, New, Open (selected), Save, Save As, Save as Adobe PDF, Print, Share, Export, Publish, Close, Account, Options, and Feedback. The main area is titled 'Open' and features a 'Recent' tab. The file list is organized into four categories: Today, Yesterday, Last Week, and an unlabeled section at the bottom. Each entry includes an Excel icon, the file name, the full path, and the last modified date and time.

Category	File Name	Path	Last Modified
Today	User Name and Passwords	C:\Users>ahughart>OD>Barbour>User Names and Passwords	3/14/2017 3:08 PM
	250-MS-Excel-Keyboards-Shortcuts	C:\Users>ahughart>OD>Barbour>Excel	3/14/2017 2:36 PM
	Schedule of Proposed Levy Rates 18	Documents>Annette>Barbour>FY2018>Budget>Levy Rates>P...	3/14/2017 8:49 AM
	Session B	Desktop	3/14/2017 8:09 AM
Yesterday	FY17 Fixed Asset Change Form	Documents>Annette>Barbour>FY2017>Fixed Assets by Month	3/13/2017 3:50 PM
	Appendix A and B for Client Letterhead	C:\Users>ahughart>OD>Barbour>FY2016>Year-End Workpap...	3/13/2017 3:45 PM
	2017-03-31 AJE's	Documents>Annette>Barbour>FY2017>AJE's>2017-03-31 AJE's	3/13/2017 3:35 PM
	TRA Chart of Accounts for Schools	Documents>Annette>Barbour>FY2017>Schools-TRA Reports ...	3/13/2017 3:10 PM
	FY2017 Vehicle Listing	Documents>Annette>Barbour>FY2017>Transportation	3/13/2017 2:37 PM
	FY15 Audit Corrective Action Plans	C:\Users>ahughart>OD>Barbour>FY2015>Year-End Workpap...	3/13/2017 1:27 PM
	2017-02-28 AJE's	Documents>Annette>Barbour>FY2017>AJE's>2017-02-28 AJE's	3/13/2017 11:13 AM
	Mon Power Accounts Breakdown	Documents>Annette>Barbour>FY2017>Utilities	3/13/2017 10:52 AM
	FY17 Coaching Supplements	Documents>Annette>Barbour>FY2017>Budget>Payroll>Coac...	3/13/2017 8:44 AM
	Last Week	FY17 TRA Monthly School Reports Checklist	Documents>Annette>Barbour>FY2017>Schools-TRA Reports ...
C.J. Wells Gas and Royalty Calculations		Documents>Annette>Barbour>FY2017>Utilities	3/10/2017 8:54 AM
Session B - [24 x 80]		Desktop	3/8/2017 3:45 PM
FY18 Coaching Supplements		Documents>Annette>Barbour>FY2018>Budget>Payroll>Coac...	3/8/2017 1:38 PM
FY18 Personnel Season Changes By Location		Documents>Annette>Barbour>FY2018>Budget>Payroll>Dec...	3/8/2017 11:49 AM

Watch Window

- Our year-end financial statements is a perfect place to use a “Watch Window” in Excel.
- There are many, many, many cells throughout the spreadsheet that have to balance to zero. It is a real pain going from sheet to sheet to sheet, etc. trying to find all of the cells that have to balance to zero. This last round of the financial statement template was even worse for this issue.
- An easy way to see if all of the cells are balancing to zero is through a Watch Window.
- The **Watch Window** is created from the **Formulas tab**.



- The next slide is a video of a Watch Window in our year-end financial statements.



Watch Window (contd.)

- The cool thing about a Watch Window is that it can be moved around.
- It can be on the top.
- It can be floating on top of your Excel File window
- It can be moved to a different monitor than Excel is on.
- Every time you make a change in your financial statements you can see in the watch window what the immediate affect is throughout the financial statements.
- The cool thing about a watch window is that you can click on an item in the watch window and it will take you directly to that particular cell on that particular page.
- It is the happiest feeling when all of your items in the watch window are \$0.00 and everything balances.
- No more searching from screen to screen to see how the change affected everything.

How to Unprotect Multiple Worksheets at Once in Excel

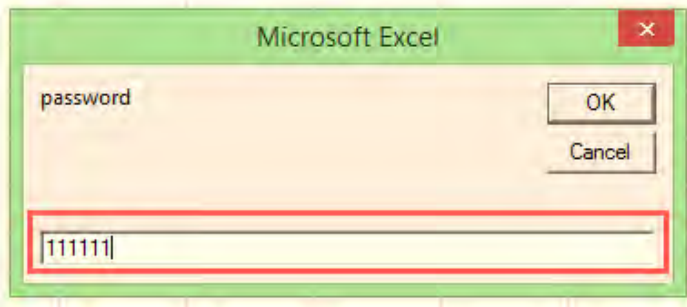
- You can use VBA for this even if you don't understand the coding.
- I use this for our year-end financial statement file. It does work!

1. Hold down the **ALT + F11** keys, and it opens the **Microsoft Visual Basic for Applications** window.

2. Click **Insert > Module**, and paste the following code in the Module Window.

```
1 Sub unprotect_all_sheets()  
2 On Error Goto booboo  
3 unpass = InputBox("password")  
4 For Each Worksheet In ActiveWorkbook.Worksheets  
5 Worksheet.Unprotect Password:=unpass  
6 Next  
7 Exit Sub  
8 booboo: MsgBox "There is s problem - check your password, capslock, etc."  
9 End Sub
```

3. Then press **F5** key to run the code, and enter the password that you have applied for the protected sheets. (the protected sheets must have the same password) See screenshot:

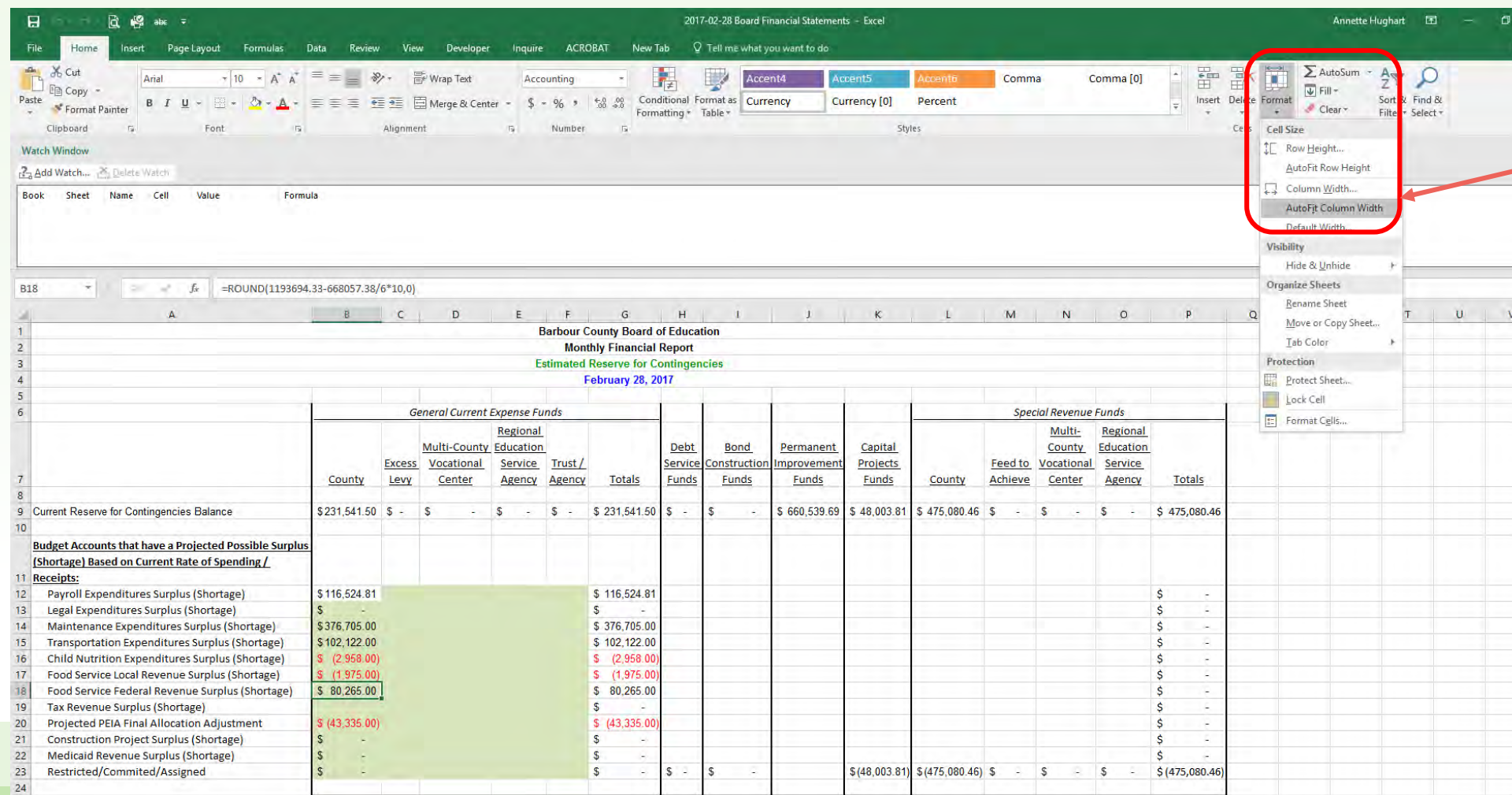


The password for our FY2016 year-end financial statement Excel file was "BOE2016". You would enter "**BOE2016**" in the box.

4. Click **OK**, and the protected sheets have been unprotected at once.

Excel AutoFit Column Width

- When you build an Excel file that you reuse sometimes the column width needs adjusted due to more digits in a number or text length.
- You can have Excel AutoFit the Column Width so it will automatically adjust. This saves time. It works most of the time. Every once in a while a column may need adjusted by hand for some reason.



Click on **Format**, then **AutoFit Column Width**.

You can also **AutoFit Row Height**.

SCHOOL BUDGET CUTS FORCE CROWDED CLASSROOMS

WE'LL HAVE TO
GREASE 'EM UP
TO GET 'EM IN



JDCORT PRESS-REGISTER
CINCINNATI, OHIO

Format Multiple Excel Sheets at the Same Time

- Sometimes when you build a file each sheet is set-up identically.
- It can be cumbersome to format a file with a lot of sheets.
- You can highlight all of the sheets and then format all of the sheets at one time.
- Click on the first sheet in the bottom bar of Excel then scroll right to find the last sheet. Hit Shift and left click on the last sheet to be formatted.
- Perform the formatting.
- Then scroll left to the first highlighted sheet, Hit Shift and left click on the first sheet. Done!

2017-02-14 B

File Home Insert Page Layout Formulas Data Review View Developer Inquire ACROBAT New Tab

Cut Copy Paste Format Painter

Arial 10 A A Wrap Text Accounting

B I U Font Alignment Number

Clipboard Font Alignment Number

Condition Formatting

	B	C	D	E	F	G	H	I
	11	61	77	21	31	41	57	
	General	Special	Special	Debt	Bond	Permanent	Capital	Total
	Current	Revenue	Revenue	Service	Construction	Improvement	Projects	Governmental
	Expense	Revenue	ARRA	Fund	Fund	Fund	Fund	
Revenues:								
Property taxes	\$ 4,305,139.05	\$ -	\$ -	\$ -	\$ -	\$ 409.80	\$ -	\$ 4,305,548.85
Other Local sources	97,303	163,186	-	-	-	43	16,288	276,820
State sources	15,361,453	1,292,095	-	-	-	-	31,716	16,685,270
Federal sources	34,715	3,314,931	-	-	-	-	-	3,349,646
Miscellaneous sources	-	-	-	-	-	-	-	-
Total revenues	19,798,616	4,770,213	-	-	-	453	48,004	24,617,286
Expenditures:								
Instruction	11,648,854	2,431,463	-	-	-	-	-	14,080,318
Supporting services:								
Students	1,042,621	192,694	-	-	-	-	-	1,235,315
Instructional staff	235,639	794,743	-	-	-	-	-	1,030,381
General administration	472,440	546	-	-	-	-	-	472,986
School administration	1,368,412	41,618	-	-	-	-	-	1,410,029
Central Services	503,328	1,827	-	-	-	-	-	505,155
Operation and maintenance of facilities	2,290,938	5,612	-	-	-	-	-	2,296,550
Student transportation	1,828,841	230,953	-	-	-	-	-	2,059,794
Other support services	6,021	-	-	-	-	-	-	6,021
Food services	16,882	1,374,973	-	-	-	-	-	1,391,855
Community services	21,285	109,647	-	-	-	-	-	130,932
Capital outlay	-	-	-	-	-	-	48,004	48,004
Debt service:								
Principal retirement	68,240	-	-	-	-	-	-	68,240
Interest and fiscal charges	5,238	-	-	-	-	-	-	5,238
Total expenditures	19,509,736	5,184,076	-	-	-	-	48,004	24,741,817
Excess (deficiency) of revenues over expenditures	288,878	(413,863)	-	-	-	453	-	(124,532)
Other financing sources (uses):								
Proceeds from disposal of real or personal property	-	-	-	-	-	-	-	-
Proceeds from the sale of bonds	-	-	-	-	-	-	-	-
Transfers in	371,206	296,646	-	-	-	102,312	-	770,165
Transfers (out)	(303,194)	(364,659)	-	-	-	-	(102,312)	(770,165)
Total other financing sources (uses)	68,013	(68,013)	-	-	-	102,312	(102,312)	-
Extraordinary Item:								
Other post employment benefits	-	-	-	-	-	-	-	-
Net change in fund balances	356,891	(481,863)	-	-	-	102,765	(102,312)	(124,532)
Fund balances - beginning	948,357	363,787	-	-	-	274,845	102,312	2,295,900
Prior period adjustments - (See Note ...)	-	-	-	-	-	310,063	-	310,063
Fund balances - beginning, as restated	948,357	363,787	-	-	-	584,907	102,312	2,605,963
Fund balances - ending	\$ 1,305,847.84	\$ 487,911.42	\$ -	\$ -	\$ -	\$ 687,672.12	\$ -	\$ 2,481,431.38
See Notes to Financial Statements								
See Notes to Financial Statements								
The notes are an integral part of the financial statements, however, to conserve space, they are not included in the publication but are available for review at the board office.								

Page 1

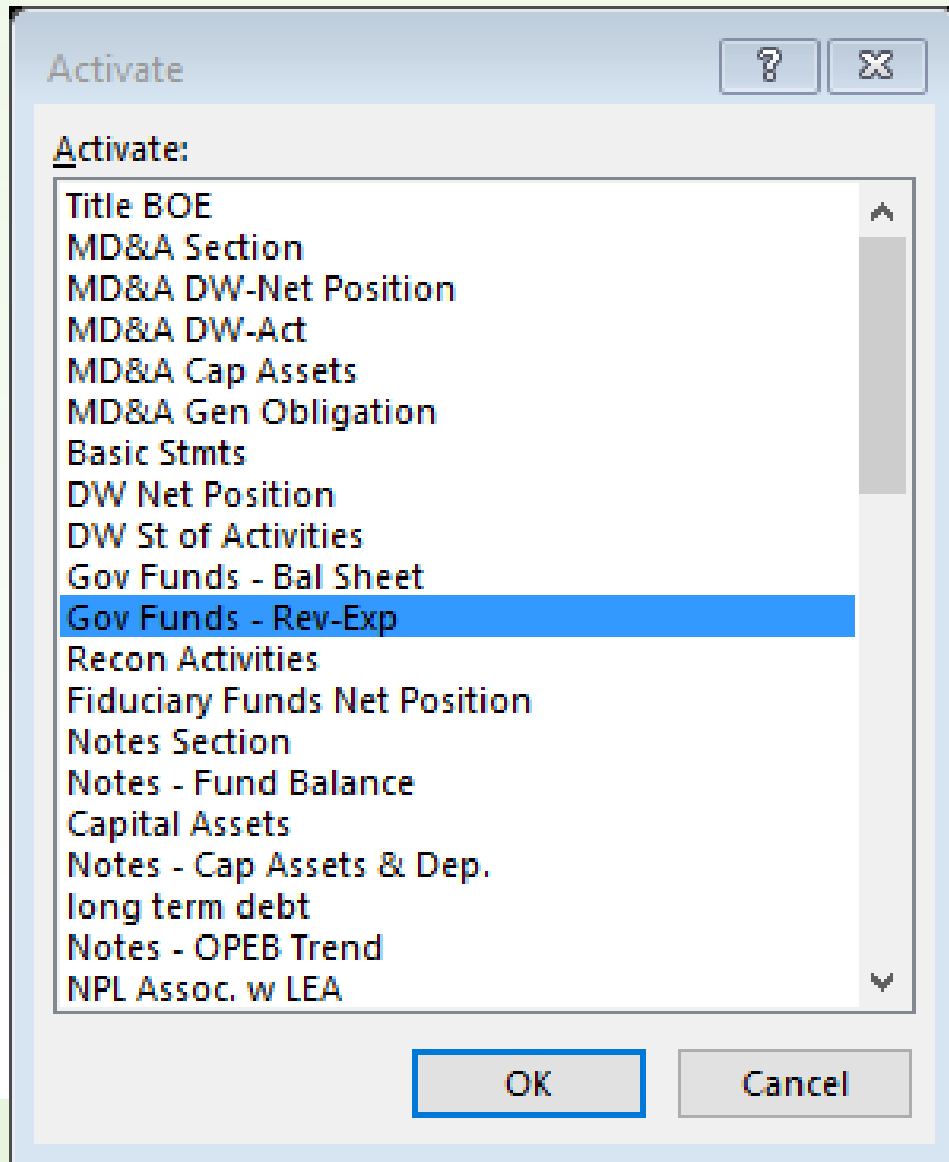
Ready

MD&A DW-Net Position MD&A DW-Act MD&A Cap Assets MD&A Gen Obligation Basic Stmt DW

Excel Sheets Listing

- When you have an Excel file with numerous sheets, instead of scrolling left and right to find the sheet that you need, go to the bottom left of your screen and hover over the left and right arrows, then right click, this will pull up a listing of all of the sheets in your file. From this window listing left double click on the sheet that you want to go to.

Excel Sheet Listing (contd.)



This is the sheet listing from our year-end financial statement file.

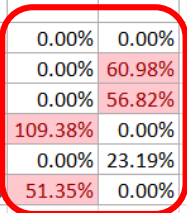
Double left click on the sheet that you want to go to.

You can also scroll in this window.

Conditional Formatting

- Conditional formatting can be helpful to highlight and/or change the color of Excel cells based on certain criteria.
- This is an example of conditional formatting to change the formatting of cells where there was a change of 30% or more.

Barbour County Board of Education FY18 Bus Run Changes																											
Current						Changes						Proposed						Percentage Change									
Bus #	Run Time (in minutes)		Total Time Per Day	Miles Per Day	Student Totals		Bus #	Run Time (in minutes)		Total Time Per Day	Miles Per Day	AM	PM	Bus #	Run Time (in minutes)		Total Time Per Day	Miles Per Day	AM	PM	Bus #	Run Time (in minutes)		Total Time Per Day	Miles Per Day	AM	PM
	AM	PM			AM	PM		AM	PM						AM	PM						AM	PM				
106B	115	120	235	45.94	60	60	106B			-				106B	115	120	235	45.94	60	60	106B	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
27 (120B)	68	74	142	76.53	32	41	27 (120B)		3	3	9.00	25		27 (120B)	68	77	145	85.53	32	66	27 (120B)	0.00%	4.05%	2.11%	11.76%	0.00%	60.98%
104B	87	68	155	59.35	36	44	104B		7	7	1.30	25		104B	87	75	162	60.65	36	69	104B	0.00%	10.29%	4.52%	2.19%	0.00%	56.82%
112B	105	65	170	61.64	32	74	112B	13		13	4.30	35		112B	118	65	183	65.94	67	74	112B	12.38%	0.00%	7.65%	6.98%	109.38%	0.00%
21B	60	73	133	45.17	34	69	21B		7	7	1.70	16		21B	60	80	140	46.87	34	85	21B	0.00%	9.59%	5.26%	3.76%	0.00%	23.19%
35	70	120	190	87.69	37	75	35	4		4	1.10	19		35	74	120	194	88.79	56	75	35	5.71%	0.00%	2.11%	1.25%	51.35%	0.00%



For background: We had multiple bus runs that were being reconfigured during this personnel season. If a bus run changes by 30% or more then the driver must be put on transfer. The driver may request a hearing.

Edit Formatting Rule

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format

Edit the Rule Description:

Format only cells with:

Cell Value greater than =0.2999

Preview: AaBbCcYyZz Format...

OK Cancel

Conditional Formatting (contd.)

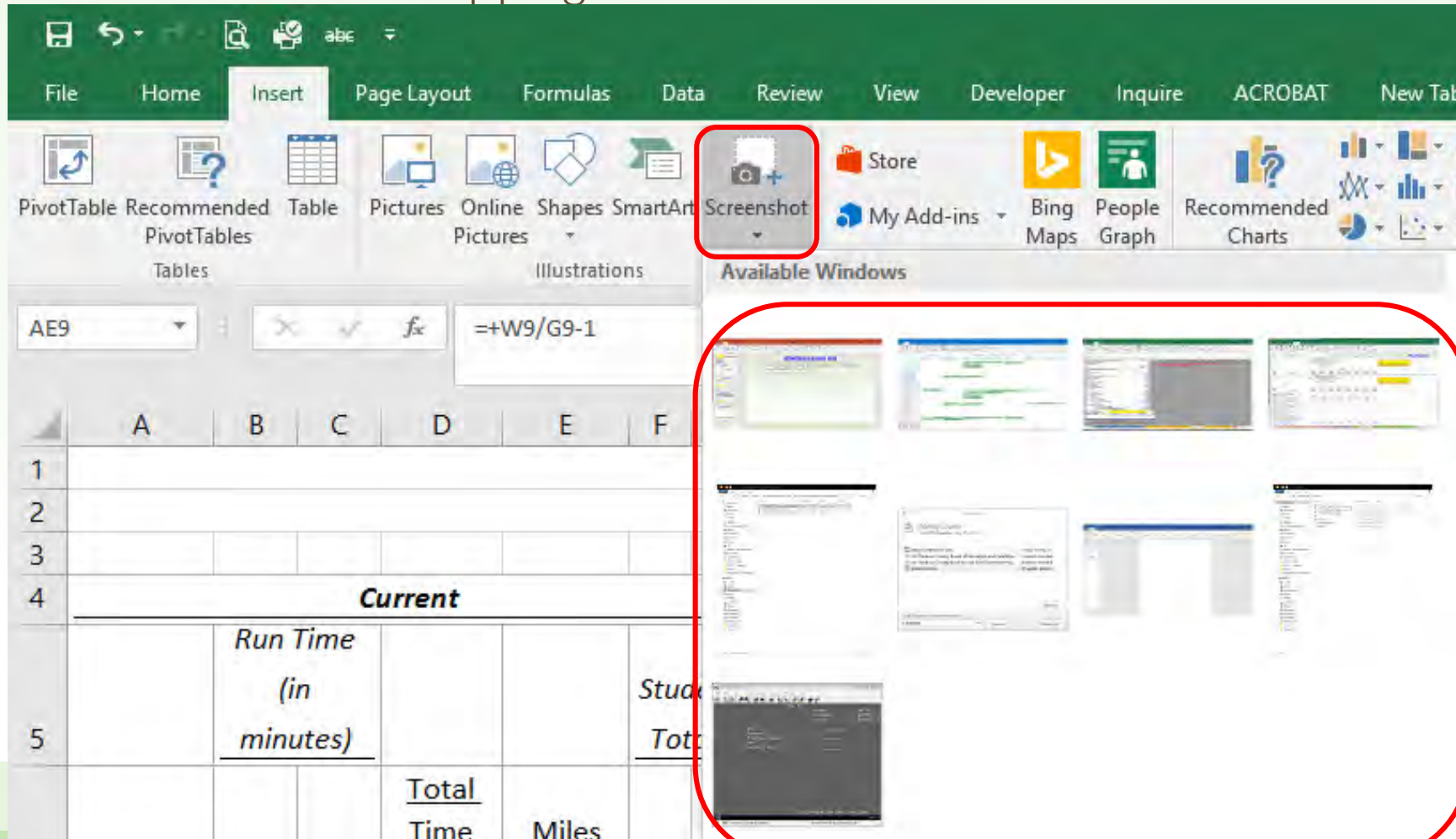
- To apply Conditional Formatting highlight the cells that you want to apply the formatting to. Then on the **Home** tab, click on **Conditional Formatting**. A dropdown will appear with many options.

The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The 'Conditional Formatting' button in the ribbon is highlighted with a red circle. The dropdown menu is open, displaying various options for applying conditional formatting to the selected cells. The background spreadsheet contains data for bus runs, organized into columns for 'Current' and 'Changes' data, including bus numbers, run times, and student totals.

Current												Changes												Percentage Change											
Run Time (in minutes)						Student Totals						Run Time (in minutes)						Student Totals						Run Time (in minutes)						Student Totals					
Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM	Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM	Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM	Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM								
106B	115	120	235	45.94	60	60	106B			-				106B	115	120	235	45.94	60	60	106B	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%								
27 (120B)	68	74	142	76.53	32	41	27 (120B)		3	3	9.00	25		27 (120B)	68	77	145	85.53	32	66	27 (120B)	0.00%	4.05%	2.11%	11.76%	0.00%	60.98%								
104B	87	68	155	59.35	36	44	104B		7	7	1.30	25		104B	87	75	162	60.65	36	69	104B	0.00%	10.29%	4.52%	2.19%	0.00%	56.82%								
112B	105	65	170	61.64	32	74	112B		13	13	4.30	35		112B	118	65	183	65.94	67	74	112B	12.38%	0.00%	7.65%	6.98%	109.38%	0.00%								
21B	60	73	133	45.17	34	69	21B		7	7	1.70	16		21B	60	80	140	46.87	34	85	21B	0.00%	9.59%	5.26%	3.76%	0.00%	23.19%								
35	70	120	190	87.69	37	75	35		4	4	1.10	19		35	74	120	194	88.79	56	75	35	5.71%	0.00%	2.11%	1.25%	51.35%	0.00%								

Attaching a Screen Shot

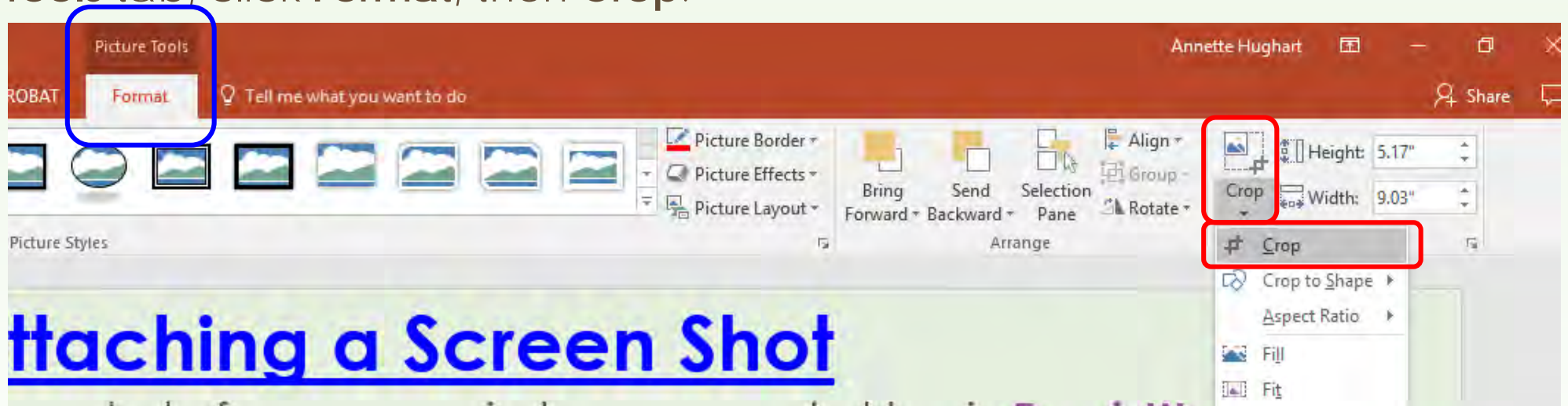
- You can attach a current screen shot of any open window on your desktop in **Excel, Word, Outlook and PowerPoint** or you can also attach a screen clipping that was previously saved.
- Click on the **Insert** tab, then click **Screenshot**. This will show a dropdown of mini pictures of windows currently open on your desktop. Click the picture of the window that you want to insert or choose Screen Clipping and find the file to insert.



Windows that are open on my desktop.

Cropping a Screen Shot or Picture

- Any picture that is inserted into **Excel, Word, Outlook and PowerPoint** can be cropped and resized.
- Click on the picture and a **Picture Tools** tab will appear at the top of your screen. Click on the **Picture Tools** tab, click **Format**, then **Crop**.



- The screen of your picture will change to a greyed color and little paddles will appear on the top, bottom, left and right and corners (see next slide).
 - *For those of you that remember Pong, the paddles look like Pong paddles.*
- Left click and hold on a paddle and move your mouse to crop out areas. When done click outside the grayed area.

Cropping a Screen Shot or Picture (contd.)

Barbour County Board of Education
FY18 Bus Run Changes

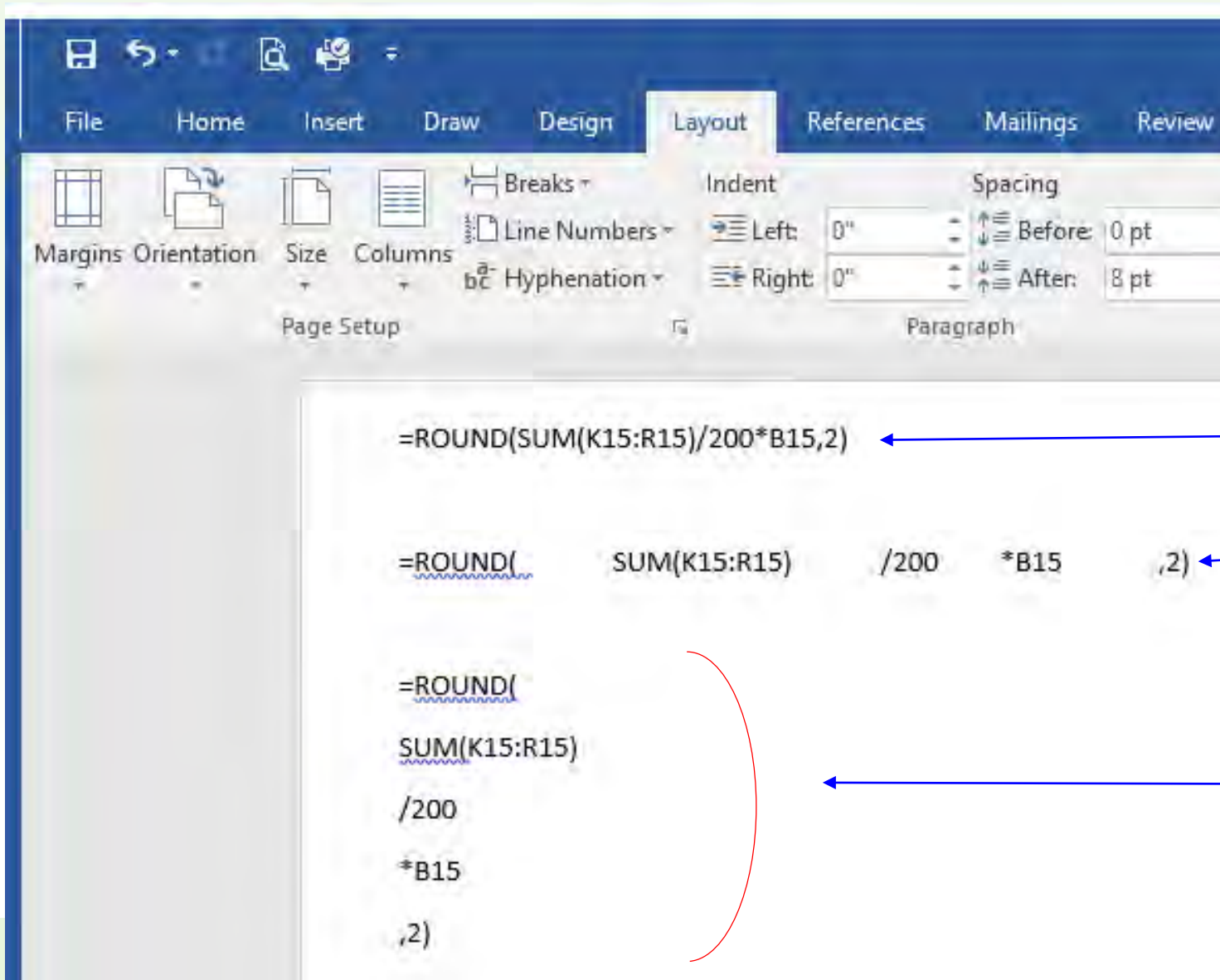
Current						Changes						Proposed						Percentage Change									
Run Time (in minutes)			Student Totals			Run Time (in minutes)			Student Totals			Run Time (in minutes)			Student Totals			Run Time (in minutes)			Student Totals						
Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM	Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM	Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM	Bus #	AM	PM	Total Time Per Day	Miles Per Day	AM	PM
106B	115	120	235	45.94	60	60	106B			-				106B	115	120	235	45.94	60	60	106B	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
27 (120B)	68	74	142	76.53	32	41	27 (120B)	3		3	9.00		25	27 (120B)	68	77	145	85.53	32	66	27 (120B)	0.00%	4.05%	2.11%	11.76%	0.00%	60.98%
104B	87	68	155	59.35	36	44	104B		7	7	1.30		25	104B	87	75	162	60.65	36	69	104B	0.00%	10.29%	4.52%	2.19%	0.00%	56.82%
112B	105	65	170	61.64	32	74	112B	13		13	4.30		35	112B	118	65	183	65.94	67	74	112B	12.38%	0.00%	7.65%	6.98%	109.38%	0.00%
21B	60	73	133	45.17	34	69	21B		7	7	1.70		16	21B	60	80	140	46.87	34	85	21B	0.00%	9.59%	5.26%	3.76%	0.00%	23.19%
35	70	120	190	87.69	37	75	35	4		4	1.10		19	35	74	120	194	88.79	56	75	35	5.71%	0.00%	2.11%	1.25%	51.35%	0.00%

Building Formulas

- Formulas with multiple parts are usually trial and error for all of us.
- When trying to build a formula with multiple sections or formulas imbedded into other formulas, it can be helpful to build each section in a separate cell to aid in determining that that particular section works without an error. Once each section has been built separately then try to nest them together.
- If you have a nested formula that is causing particular grief, Open **Word** and change the orientation to **Landscape** and then change the paper size to **Legal** or **Ledger** (even wider), also make the left and right **margins** really **small**.
- Then **copy the formula into Word** and **step it out**, either on multiple lines with spaces in between each section. Sometimes this helps you to visually see where the problem is. When a formula is all scrunched together it can be difficult to see where the problem is.

Building Formulas (contd.)

- This is a simple formula as an example:



Original Formula

Formula with spacing

Formula stepped out on multiple lines for each section

Building Formulas (contd.)

- In Excel we have all used the Excel help with building formulas by choosing a formula then Excel steps you through a formula with the Function Arguments window.
- This Function Arguments window is another tool to use try to determine where a problem is in a formula.
- **Place your cursor on the cell** where the formula is and then click on the **Formula tab**, then **Insert Function**. This will bring up the formula **Function Arguments**. From the Function Arguments window you may be able to see which section may be causing the error issue.

The screenshot shows the 'Function Arguments' dialog box for the COUNTIFS function. The dialog has a title bar with a question mark and a close button. The function name 'COUNTIFS' is displayed at the top. Below it, there are four rows of arguments, each with a text box, a selection icon, and a preview of the argument's value. The arguments are: Criteria_range1 (DS47:DS69), Criteria1 (>=March 1), Criteria_range2 (DS47:DS69), and Criteria2 (<=March 31). Below the arguments, the formula result is shown as '= 2'. A description of the function is provided: 'Counts the number of cells specified by a given set of conditions or criteria.' A note explains that 'Criteria_range1' is the range of cells to be evaluated. At the bottom, there is a 'Formula result =' field showing '2', a 'Help on this function' link, and 'OK' and 'Cancel' buttons.

Argument	Value	Preview
Criteria_range1	DS47:DS69	{42804;42811;42835;42836;0;0;0;0;...}
Criteria1	">=March 1"	">=March 1"
Criteria_range2	DS47:DS69	{42804;42811;42835;42836;0;0;0;0;...}
Criteria2	"<=March 31"	"<=March 31"

Formula result = 2

Counts the number of cells specified by a given set of conditions or criteria.

Criteria_range1: is the range of cells you want evaluated for the particular condition.

[Help on this function](#) [OK] [Cancel]

Building Formulas (contd.)

- On the **Formulas** tab, you could also use **Evaluate Formula** to assist with a formula issue.

The screenshot shows the Microsoft Excel interface with the **Formulas** tab selected. The ribbon includes the **Function Library** (Insert function, AutoSum, Recently Used, Financial, Logical, Text, Date & Time, Lookup & Reference, Math & Trig, More Functions), **Defined Names** (Name Manager, Define Name, Use in Formula, Create from Selection), **Formula Auditing** (Trace Precedents, Trace Dependents, Remove Arrows, Show Formulas, Error Checking, Evaluate Formula), **Watch** (Watch Window), and **Calculation** (Calculate Now, Calculate Sheet Options). A red arrow points to the **Evaluate Formula** button in the Formula Auditing group. A tooltip for **Evaluate Formula** is displayed, stating: "Debug a complex formula, evaluating each part of the formula individually. Stepping through the formula part by part can help you verify it's calculating correctly." The active cell (D37) contains the formula `=COUNTIFS(D$47:D$69,">=May 1",D$47:D$69,"<=May 31")`. The spreadsheet shows columns A through J and rows 20 through 22. Row 20 contains "Average Retirement Percentage for County" with a value of 8.47% in column D. Row 21 contains "Workers' Comp Rate for Class 8868 (object 262) for County" with a value of 0.20% in column D. A clipboard panel is visible on the left side of the screen.

- With a complicated formula, this can help with determining which section of a formula may be the issue.

Excel Formula Cell Expansion

- When building formulas, expand the formula cell so the full formula shows and is not cutoff.
- Just drag down on the bottom of the formula cell to expand.

The screenshot shows the Microsoft Excel interface. The title bar reads "2017-03-31 Board Financial Statements - Excel". The ribbon is set to "Formulas". The formula bar contains the following formula: `=DAY(Func",0.0111))+IF(ISERROR(+GETPIVOTDATA(CONCATENATE("Sum of YTD FY",YEAR('Input Sheet'!B5)), 'Prog-Func Pivot Table #2'!A7,"Prog/Func",0.0111)),"0",+GETPIVOTDATA`. The spreadsheet grid below shows a report titled "Barbour County Board of Education Analysis of Revenues in Comparison to Prior Year Revenues February 28, 2017 Fiscal Year Ending June 30, 2017". The grid has columns for "Revenue Source Codes" and "Description", and rows for various time periods from 07/01/16 to 02/28/17. A red arrow points from a yellow box labeled "Drag down" to the bottom of the formula cell. Another yellow box labeled "Highlight lines to expand and others to watch" is on the right side of the spreadsheet.

Drag down

Excel Formula Cell Expansion (contd.)

2017-03-31 Board Financial Statements - Excel

Annette Hughart

Page Layout Formulas Data Review View Developer Inquire ACROBAT New Tab Tell me what you want to do

Function Library: Special, Logical, Text, Date & Time, Lookup & Reference, Math & Trig, Functions, More

Formula Auditing: Define Name, Use in Formula, Create from Selection, Trace Precedents, Trace Dependents, Remove Arrows, Show Formulas, Error Checking, Evaluate Formula, Watch Window

Calculation: Calculate Now, Calculate Sheet

Formula Bar: = (IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0111)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0111)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0112)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0112)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0113)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0113)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0114)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0114)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0115)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0115)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0116)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0116)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0117)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0117)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0118)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0118)) + IF (ISERROR (+GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0119)), "0", +GETPIVOTDATA (CONCATENATE ("Sum of YTD FY", YEAR ("Input Sheet"!\$B\$5)), 'Prog-Func Pivot Table #2'!\$A\$7, "Prog/Func", 0.0119)))

Barbour County Board of Education
Analysis of Revenues in Comparison to Prior Year Revenues
February 28, 2017
Fiscal Year Ending June 30, 2017

Revenues from . . .

Description	07/01/16 to 02/28/17	07/01/15 to 02/29/16	07/01/14 to 02/28/15	07/01/13 to 02/28/14	07/01/12 to 02/28/13	07/01/11 to 02/29/12	01/01/10 to 02/28/11	01/01/09 to 08/31/09
Local Sources:								
State	3,078,456.62	2,949,015.59	2,339,109.48	2,383,228.74	2,107,902.31	1,663,512.12	1,960,318.34	1,577,626.80
Initiation Plan (IRP) Fee	15,417.54	29,940.58	14,268.58	18,261.97	24,036.55	21,532.73	4,928.56	9,640.14

Highlight lines that you want the Board, superintendent and others to watch. RED for BAD; BLUE for GOOD.

Formula cell extended to show entire formula

Clipboard

- Copying and pasting a lot of different things can be tedious.
- In most Microsoft programs **clicking Ctrl+C twice** will bring up the **Clipboard**.
- The Clipboard will allow you to copy many items to the Clipboard and then use them when needed.
- The items on the Clipboard don't disappear when used. The items are only removed from the Clipboard when you clear the items.
- One of the interesting things about the Clipboard is when multiple Microsoft programs are open on your desktop that the Clipboard appears in each program with items copied from different programs.
- I was able to get the same exact Clipboard to show up on Excel, Word and Outlook that were open on my desktop.

Clipboard (contd.)

Clipboard

Paste All Clear All

Click an Item to Paste:

- Clipboard
- This Function Arguments window is another tool to use tr...
- Building Formulas
- Original Formula
- Building Formulas
- This is a simple formula as an example:
- `=ROUND(SUM(K15:R15)/200*B15,2)`
- `=ROUND(SUM(K15:R15)/200*B15,2)`
- `=ROUND(SUM(K15:R...`

Options

Month Ending	Days from <u>Original Calendar</u> (Fill in Dates in Yellow Boxes Below)	# of Snow Days (Days pull from chart below)
7/31/2016	-	-
8/31/2016	13	-
9/30/2016	19	-
10/31/2016	20	-
11/30/2016	15	-
12/31/2016	16	-
1/31/2017	20	(3)
2/28/2017	19	-
3/31/2017	22	(1)
4/30/2017	18	-
5/31/2017	18	-
6/30/2017	-	-
Total (should be 180)	180	(4)

Snow Days

Date of Snow Days (Fill in

- This is the screen shot of the Clipboard in Excel.
- Notice that there are items from PowerPoint, Word and Excel on the Clipboard.
- The Clipboard is identical in Excel, Word and Outlook.

Clipboard (contd.)

The screenshot shows the Office Clipboard window on the left, which is open to the 'Options' menu. The main window contains a list of copied items, including a spreadsheet thumbnail, a 'Clipboard' folder, a function argument window, 'Building Formulas', an 'Original Formula', another 'Building Formulas' entry, and a simple formula example. The background shows an Excel spreadsheet with a table of dates from 7/31/2016 to 6/30/2017, with a yellow highlight on the 2016 dates. The 'Options' menu is open, showing several checked options: 'Show Office Clipboard Automatically', 'Show Office Clipboard When Ctrl+C Pressed Twice', 'Show Office Clipboard Icon on Taskbar', and 'Show Status Near Taskbar When Copying'. The 'Options' button at the bottom of the menu is also highlighted.

Month Ending	Days for Calendar (in Yellow)
7/31/2016	
8/31/2016	
9/30/2016	
10/31/2016	
11/30/2016	
12/31/2016	
1/31/2017	
2/28/2017	
3/31/2017	
4/30/2017	
5/31/2017	
6/30/2017	
Total (should be 180)	

- To have the Clipboard show automatically, **open the Clipboard by clicking Ctrl+C twice**, then at the bottom of the Clipboard window left click on **Options**, then check beside **Show Office Clipboard Automatically**.

Excel Templates (contd.)

- We all know it is about working smarter instead of harder.
- If you have something that is reoccurring, create templates in Excel.
- I have a lot of templates that I have built over the years. It saves so much time.
- Some of the templates that I have built over the years are:

- [AJE's](#) (*right click and select Open Hyperlink*)
- [BJE's](#) (*right click and select Open Hyperlink*)
- WV Municipal Bond Reconciliation
- Indirect Cost Transfers Calculations
- Monthly Board Financial Reports

- Bank Reconciliations
- Utility Reports
- Budget File
- Budget Reconciliation
- Indirect Cost Calculations
- Faculty Senate Distribution
- On and on and on

Remove Duplicates in Excel

- There may be times when you want to **Remove Duplicates** from a large amount of data.

The screenshot shows the Microsoft Excel interface. The 'Data' tab is selected and highlighted with a red box. The 'Remove Duplicates' button in the 'Data Tools' group is also highlighted with a red box. A tooltip for the 'Remove Duplicates' button is visible, stating: 'Remove Duplicates: Delete duplicate rows from a sheet. You can pick which columns should be checked for duplicate information.'

The spreadsheet below shows a table with columns A through G. The data is as follows:

	A	B	C	D	E	F	G
1	PR	OG - P	BF.617		BARBOUR COUNTY SCHOOLS		PAGE 1
2	DA	TE -	4/15/2001	0	Budget Forecasting Account Distribution	by ACCOUNT	
3	TI	ME - 1	2:45:03	5			
4	--	-----	-----	----	-----	-----	-----
5	Ac	count	Code			FTE/	
6		Emp	loyee		Job Pay	Reference	Type Vendor Amount
7	Fund	Project	Prog/Func	Object	Junk #1	FTE	Junk #2
8	11	0	0.11111	0.111	.101.0000.0000.00	PROFESSIONAL REG SALARY 8	11.2
9		902	-3	72	ANGLIN, SUSAN L.	TCH TCH	2 1 53,174.00
10		902	-4	7	BOLYARD, CINDY S.	TCH TCH	2 1 49,528.00
11		902	-1	60	BRIGHT, MATTHEW L.	TCH TCH	2 1 9,459.80
12		902	-10	33	COFFMAN, LINDA J.	TCH TCH	2 1 59,371.00
13		902	-2	53	GRAY, CRYSTAL D.	TCH TCH	2 1 40,823.00

Remove Duplicates in Excel (contd.)

- When downloading reports from WVEIS, sometimes WVEIS will list the first row on a page that is a duplicate from the last row of the previous page.
- This can be a problem if you are trying to run the data through a pivot table.
- Most of the time, WVEIS prints the header with "**** Continued ****" as follows:

Account Code	Employee	Job	Pay	FTE/ Reference	Type	Vendor	Amount
11.00000.11111.111.303.0000.0000.00		PROFESSIONAL REG SALARY		8 16.185			

- But it is WVEIS and sometimes it has a hiccup and doesn't print the ****Continued****.
- This is the bottom of page 68 of our Budget Forecasting Account Distribution by Account report:

11.00000.12411.121.201.0000.0000.00		SERVICE REGULAR SALARY		8		1.050	
-------------------------------------	--	------------------------	--	---	--	-------	--

- This is the top of page 69, WVEIS missed the ****Continued****.

Account Code	Employee	Job	Pay	FTE/ Reference	Type	Vendor	Amount
11.00000.12411.121.201.0000.0000.00		SERVICE REGULAR SALARY		8 1.050			
	902-00-0427	DEAN, KIMBERLY D.	SRV	SRV	2 1		26,512.50
	902-00-0427	DEAN, KIMBERLY D.	SRV	Z12HR	2 6		115.50
	902-00-0427	DEAN, KIMBERLY D.	SRV	ZSTH	2 6		777.00
Total Distributions For 11.00000.12411.121.201.0000.0000.00							27,405.00

Remove Duplicates in Excel (contd.)

- If the duplicate information isn't removed, a pivot table will count the information twice since there isn't the statement of ****Continued**** to be able to exclude these cells through the Pivot Table.
- Without the duplicates removed a Pivot Table will return that there are 2.10 FTE in account code 11.00000.12411.121.201 when it is really only 1.05 FTE.
- When the duplicates are removed, the Pivot Table calculates the correct FTE at 1.05.
- Working with large amounts of data can be easier with the duplicates removed.

Pivot Table Calculated Field

- If you have never used a Pivot Table before, this could make you take the leap.
- We all hate it when a grant award letter is issued with a different dollar amount than we received as an estimate when we built our budgets.
- It is usually easier to reverse out the whole budget and then re-enter the new budget instead of trying to figure out the amount of difference for each budget line. *But this is a lot of work!*
- A **Pivot Table Calculated Field** can assist with this process.
- I think all or most of us enter our Title I budgets down to the location code.
- We will use Title I as an example.

2016-10-31 Month Ending BJE's - Excel

File Home Insert Page Layout Formulas Data Review View Developer Inquire ACROBAT New Tab Tell me what you want to do

Clipboard Font Alignment Number

202

Barbour Board of Education
Budget Supplement for Title I
October 3, 2016

Please check one:
 Budget Supplement (add new budget)
 Budget Transfer (move money between lines)

Fund	Project	Revenue Source, Program/Function, or Balance Sheet Account	Object	Location	Account Description	Debit (add to)	Credit (subtract from)
61	41710	04511	009		Title I - Elementary and Secondary Education Act -- Thru State Restricted -- Revenues	865,861.00	
61	41710	12110	611	001	Title I - Elementary and Secondary Education Act -- Attendance & Social Work - General -- Supplies		10,000.00
61	41710	12170	581	001	Title I - Elementary and Secondary Education Act -- Parent/Family Involvement: -- Staff Travel - In County		20,000.00
61	41710	12170	611	001	Title I - Elementary and Secondary Education Act -- Parent/Family Involvement: -- Supplies		10,000.00
61	41710	12170	643	001	Title I - Elementary and Secondary Education Act -- Parent/Family Involvement: -- Supplemental		50,000.00
61	41710	12211	111	001	Title I - Elementary and Secondary Education Act -- Supervision of Improvement of Instruction Services -- Regular		62,145.00
61	41710	12211	121	001	Title I - Elementary and Secondary Education Act -- Supervision of Improvement of Instruction Services -- Regular		21,806.00
61	41710	12211	211	001	Title I - Elementary and Secondary Education Act -- Supervision of Improvement of Instruction Services -- Health/Accident/Life		2,994.00
61	41710	12211	218	001	Title I - Elementary and Secondary Education Act -- Supervision of Improvement of Instruction Services -- Other Post Employment Benefits (OPEB) Paid		1,529.00

Ready

Pivot Table Calculated Field (contd.)

- This is a partial screen shot of Excel for the reversal of the original budget estimate with the final budget amounts.
- Barbour is a small county, therefore, our budget entry will be fewer lines than a lot of other counties.
- There are 140 lines in this example.

Pivot Table Calculated Field (contd.)

- This is a screen shot of a **Pivot Table** with a **Calculated Field**.
- Now all we have to key into WVEIS are the amounts in the Calculated Field which is **13 lines** and **not 140 lines!**

- Excel Pivot Table Spreadsheet
- Double Click to open the imbedded Excel sheet and scroll through rows

Fund	Project	Account	Object	Location	Sum of Debit (add to)	Sum of Credit (subtract from)	Sum of Difference - Debit (Credit)
61	41710	11111	111	201	\$ 127,712.00	\$ 127,712.00	\$ -
61	41710	11111	111	202	\$ 54,083.00	\$ 54,083.00	\$ -
61	41710	11111	111	203	\$ 26,233.00	\$ 26,233.00	\$ -
61	41710	11111	111	204	\$ 113,572.00	\$ 113,572.00	\$ -
61	41710	11111	111	303	\$ 71,096.00	\$ 71,096.00	\$ -
61	41710	11111	211	201	\$ 17,928.00	\$ 17,928.00	\$ -
61	41710	11111	211	202	\$ 8,952.00	\$ 8,952.00	\$ -
61	41710	11111	211	203	\$ 4,476.00	\$ 4,476.00	\$ -
61	41710	11111	211	204	\$ 13,776.00	\$ 13,776.00	\$ -
61	41710	11111	211	303	\$ 10,560.00	\$ 10,560.00	\$ -
61	41710	11111	218	201	\$ 4,704.00	\$ 4,704.00	\$ -
61	41710	11111	218	202	\$ 2,352.00	\$ 2,352.00	\$ -
61	41710	11111	218	203	\$ 1,176.00	\$ 1,176.00	\$ -
61	41710	11111	218	204	\$ 5,880.00	\$ 5,880.00	\$ -
61	41710	11111	218	303	\$ 3,528.00	\$ 3,528.00	\$ -
61	41710	11111	221	201	\$ 9,322.00	\$ 9,322.00	\$ -
61	41710	11111	221	202	\$ 3,830.00	\$ 3,830.00	\$ -

Calculated Field

Pivot Table Calculated Field (contd.)

2016-10-31 Month Ending BJE's - Excel

PivotTable Name: PivotTable1
Active Field: Fund

Fields, Items, & Sets

- Calculated Field...
- Calculated Item...
- Solve Order...
- List Formulas
- Create Set Based on Row Items...
- Create Set Based on Column Items...
- Manage Sets...

	Fund	Project	Account	Object	Location	Sum of Debit (add to)	Sum of Credit (subtract from)
5	61	41710	11111	111	201	\$ 127,712.00	\$ 127,712.00
6	61	41710	11111	111	202	\$ 54,083.00	\$ 54,083.00
7	61	41710	11111	111	203	\$ 26,233.00	\$ 26,233.00
8	61	41710	11111	111	204	\$ 113,572.00	\$ 113,572.00
9	61	41710	11111	111	303	\$ 71,096.00	\$ 71,096.00
10	61	41710	11111	211	201	\$ 17,928.00	\$ 17,928.00
11	61	41710	11111	211	202	\$ 8,952.00	\$ 8,952.00
12	61	41710	11111	211	203	\$ 4,476.00	\$ 4,476.00
13	61	41710	11111	211	204	\$ 13,776.00	\$ 13,776.00
14	61	41710	11111	211	303	\$ 10,560.00	\$ 10,560.00
15	61	41710	11111	218	201	\$ 4,704.00	\$ 4,704.00
16	61	41710	11111	218	202	\$ 2,352.00	\$ 2,352.00
17	61	41710	11111	218	203	\$ 1,176.00	\$ 1,176.00
18	61	41710	11111	218	204	\$ 5,880.00	\$ 5,880.00
19	61	41710	11111	218	303	\$ 3,528.00	\$ 3,528.00
20	61	41710	11111	221	201	\$ 9,322.00	\$ 9,322.00
21	61	41710	11111	221	202	\$ 3,830.00	\$ 3,830.00
22	61	41710	11111	221	203	\$ 1,840.00	\$ 1,840.00
23	61	41710	11111	221	204	\$ 8,360.00	\$ 8,360.00
24	61	41710	11111	221	303	\$ 4,500.00	\$ 4,500.00
25	61	41710	11111	233	201	\$ 6,467.00	\$ 6,467.00
26	61	41710	11111	233	202	\$ 4,056.00	\$ 4,056.00
27	61	41710	11111	233	203	\$ 1,967.00	\$ 1,967.00
28	61	41710	11111	233	204	\$ 8,518.00	\$ 8,518.00
29	61	41710	11111	233	303	\$ 5,332.00	\$ 5,332.00
30	61	41710	11111	262	201	\$ 473.00	\$ 473.00
31	61	41710	11111	262	202	\$ 200.00	\$ 200.00
32	61	41710	11111	262	203	\$ 97.00	\$ 97.00
33	61	41710	11111	262	204	\$ 420.00	\$ 420.00
34	61	41710	11111	262	303	\$ 263.00	\$ 263.00

- To insert a Calculated Field into a Pivot Table put your cursor on any cell of the pivot table.
- The **PivotTable Tools** tab will show up when your cursor is on a cell in the pivot table.
- Click on the **Analysis** tab. Then click on **Field, Items & Sets**. In the dropdown choose **Calculated Field**.

Pivot Table Calculated Field (contd.)

Name the New Field Header

Insert Calculated Field

Name: Difference - Debit (Credit) Add

Formula: = 'Debit (add to)' - 'Credit (subtract from)' Delete

Fields:

- Fund
- Project
- Revenue Source, Program / Function, or Balance Sheet Account
- Object
- Location
- Account Description
- Debit (add to)
- Credit (subtract from)

Insert Field

OK Close

In the Formula Bar:

- Insert the Name of the First Column, "Debit (add to)" using the Insert Field button
- Type "-" in the formula bar
- Insert the Name of the second column, "Credit (subtract from)" using the Insert Field button
- Click OK

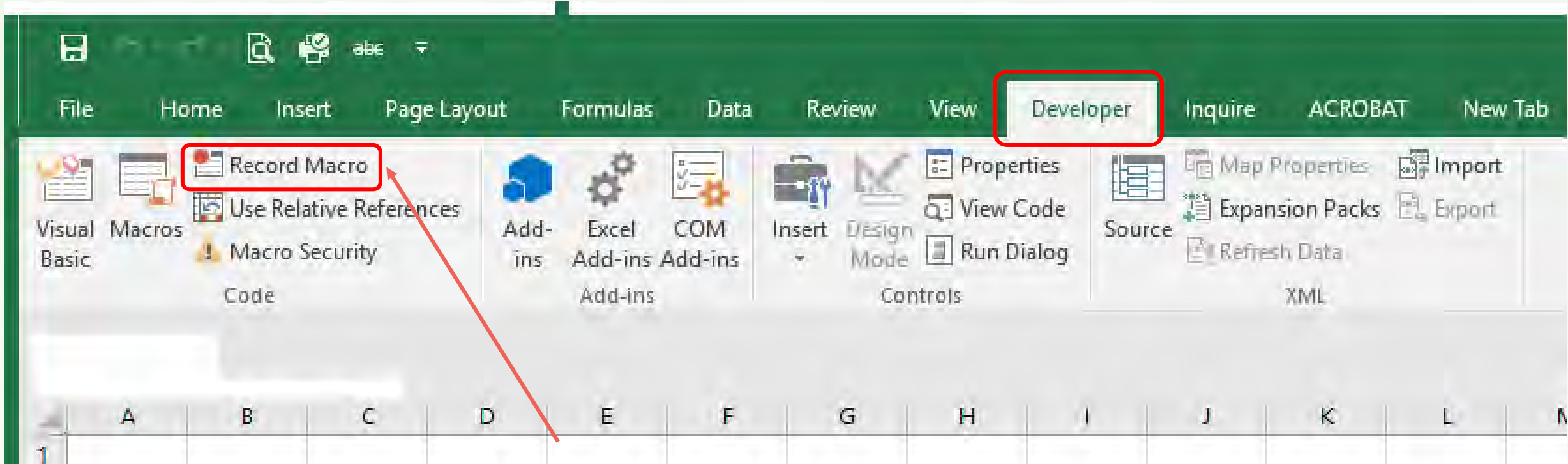
Build a Pivot Table

- Building pivot tables and reusing year after year after year will save tons of time.
- There are many ways to build and format pivot tables. It is not as hard as it looks. Pivot tables look intimidating. I was hooked after the first Pivot Table I built.
- You can do so much more with pivot tables than just select certain data to populate in columns. This next hyperlink is a good example; it is a little more complex.
- [Child Nutrition balances pivot tables](#) *(to open, right click and then choose Open Hyperlink)*

How to Correct When a Formula Returns an Error of "#REF"

- The formula of "**ISERROR**" doesn't show up In Excel under the Formulas tab, searching in Insert Function field.
- There is always more than one way to write a formula in Excel but this one is pretty straight forward when built into an IF statement.
- =IF(ISERROR(+GETPIVOTDATA("Current YTD Budget",'Reserve for Cont. Pivot Table'!\$A\$7,"Fund",11)),0,+GETPIVOTDATA("Current YTD Budget",'Reserve for Cont. Pivot Table'!\$A\$7,"Fund",11))
- This is just an IF statement where if Condition 1 is an error because it can't be found, then the formula returns a "0", if Condition 1 does not return an error then it returns the value.
- It is just an IF statement with 3 sections just like any other IF statement.

How to Record a Macro

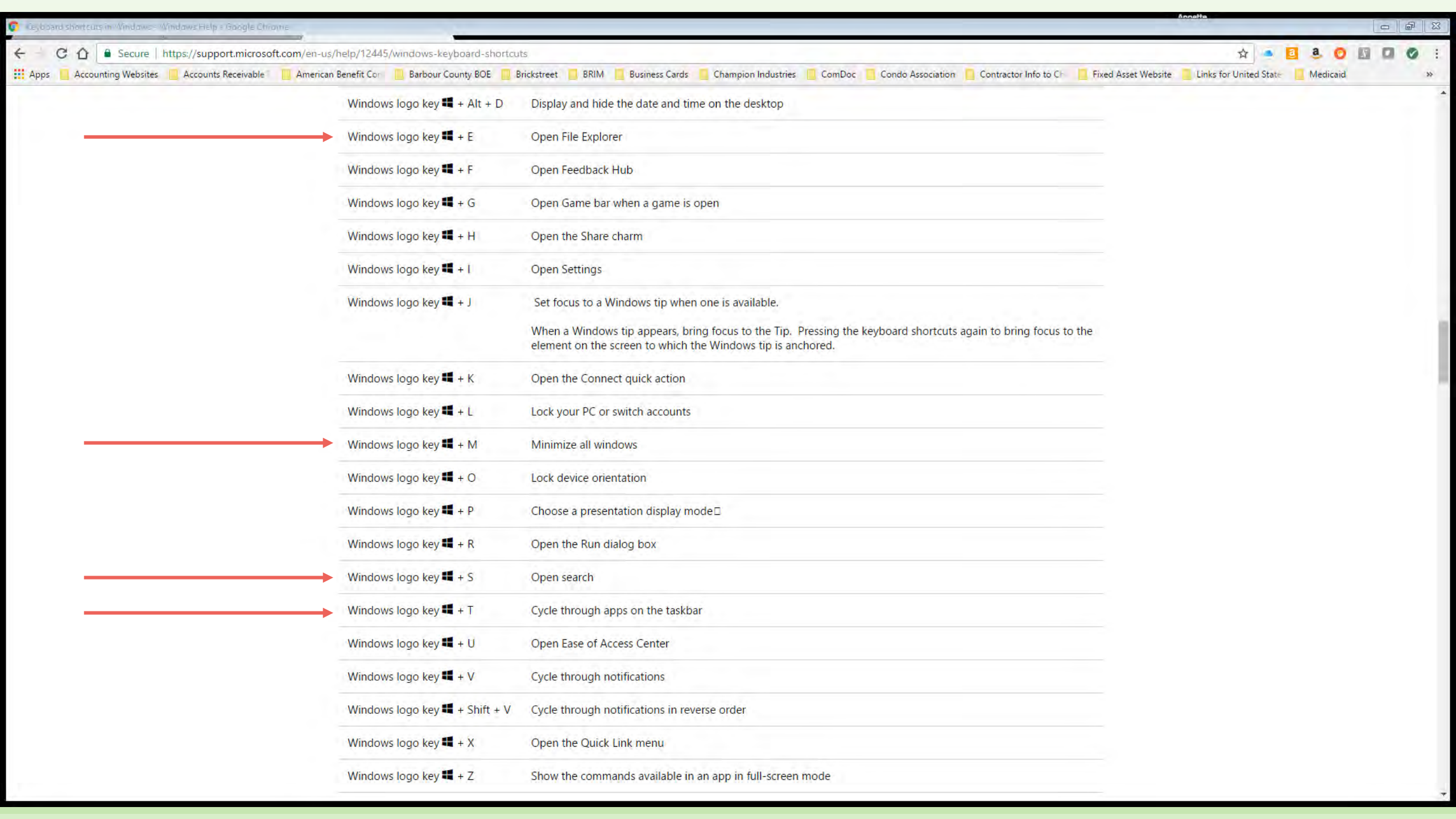


- See next page for a video of a Macro recording.



Shortcut Keys

- This is a link for Shortcut Keys <https://support.microsoft.com/en-us/help/12445/windows-keyboard-shortcuts> for
 - General Keyboard Shortcuts
 - Windows Logo Key Keyboard Shortcuts
 - Command Prompt Keyboard Shortcuts
 - File Explorer Keyboard Shortcuts
 - Virtual Desktops Keyboard Shortcuts
 - Taskbar Keyboard Shortcuts
 - Settings Keyboard Shortcuts
- A few Windows Logo shortcuts that you might use are on the next slides.



Windows logo key + Alt + D Display and hide the date and time on the desktop

Windows logo key + E Open File Explorer

Windows logo key + F Open Feedback Hub

Windows logo key + G Open Game bar when a game is open

Windows logo key + H Open the Share charm

Windows logo key + I Open Settings

Windows logo key + J Set focus to a Windows tip when one is available.

When a Windows tip appears, bring focus to the Tip. Pressing the keyboard shortcuts again to bring focus to the element on the screen to which the Windows tip is anchored.

Windows logo key + K Open the Connect quick action

Windows logo key + L Lock your PC or switch accounts

Windows logo key + M Minimize all windows

Windows logo key + O Lock device orientation

Windows logo key + P Choose a presentation display mode

Windows logo key + R Open the Run dialog box

Windows logo key + S Open search

Windows logo key + T Cycle through apps on the taskbar

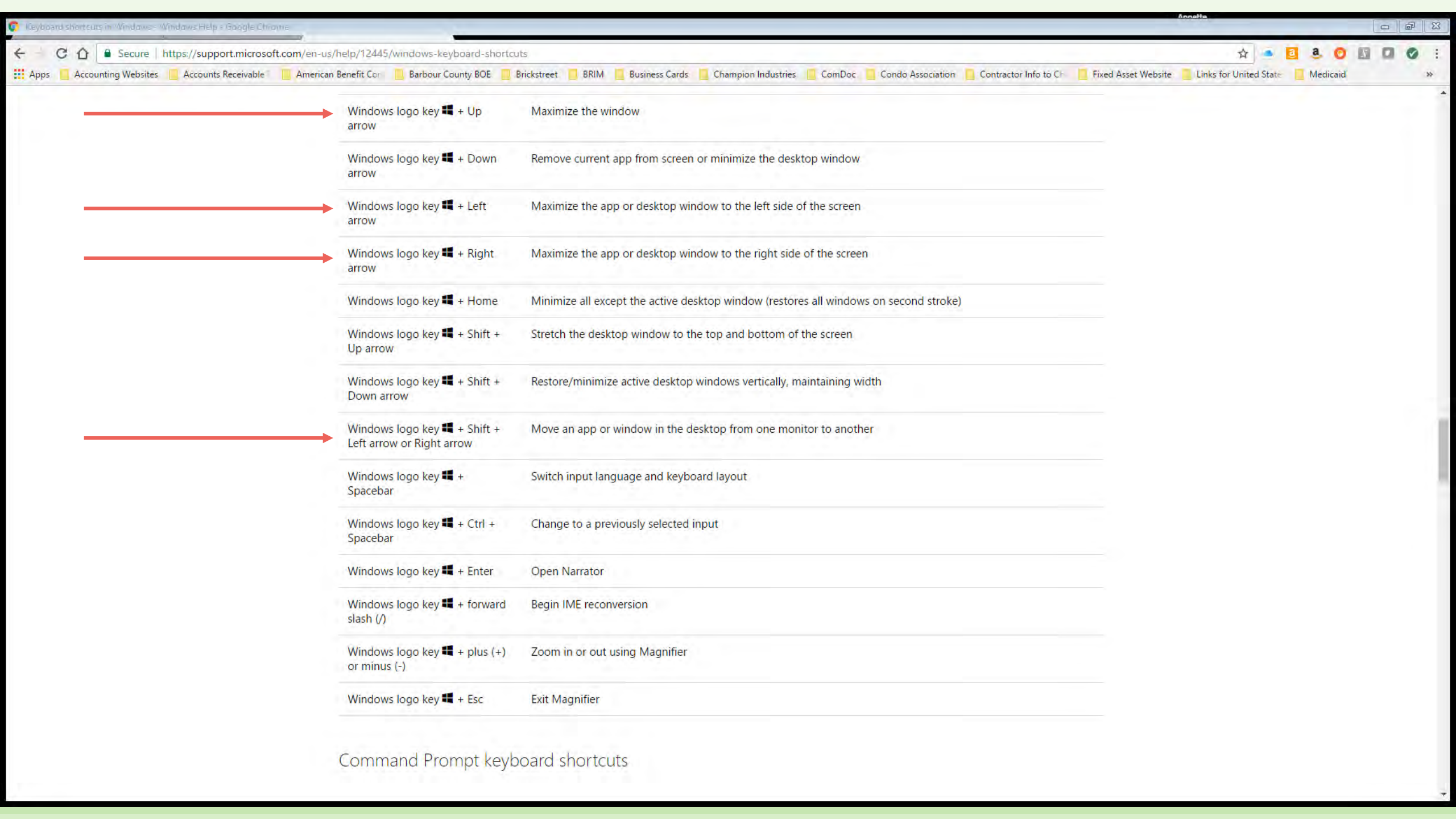
Windows logo key + U Open Ease of Access Center

Windows logo key + V Cycle through notifications

Windows logo key + Shift + V Cycle through notifications in reverse order

Windows logo key + X Open the Quick Link menu

Windows logo key + Z Show the commands available in an app in full-screen mode

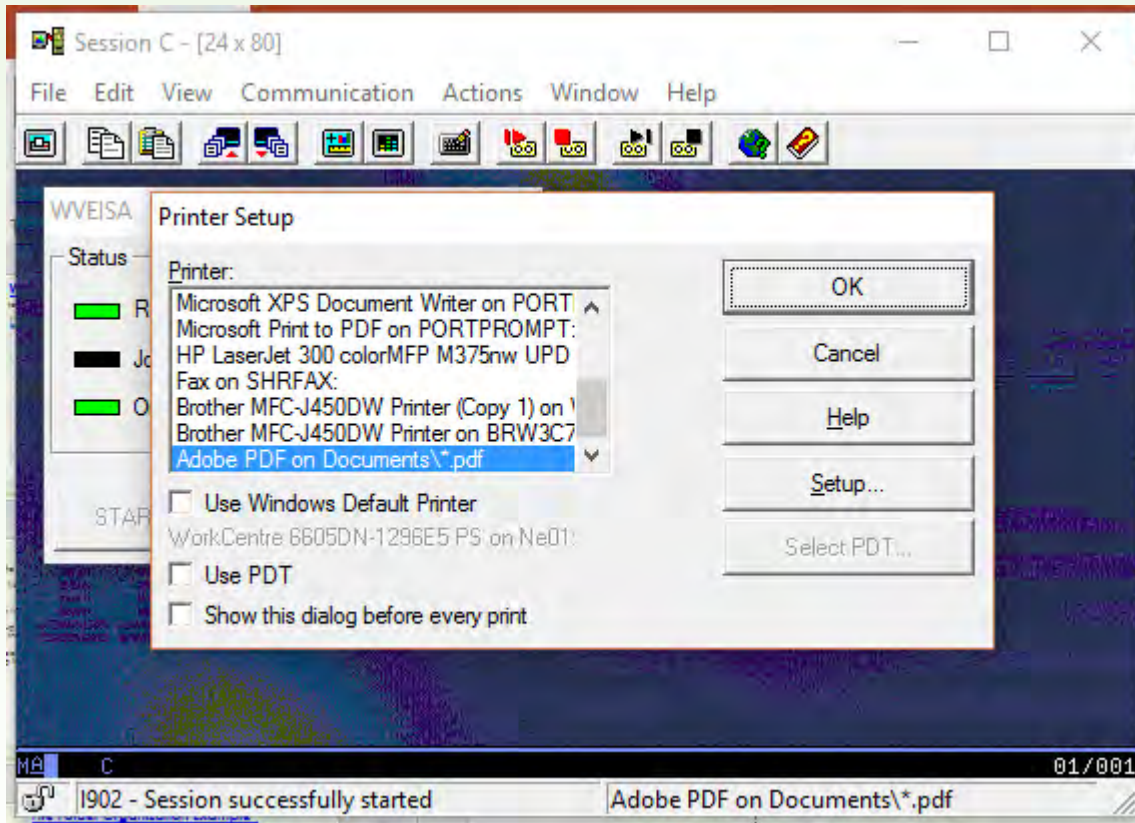


Command Prompt keyboard shortcuts

Windows Explorer Shortcut Keys that You May Use

- Create a new folder, "Ctrl + Shift + N"
- Display the preview panel, "Alt + P"
- Maximize or minimize the active window, "F11"

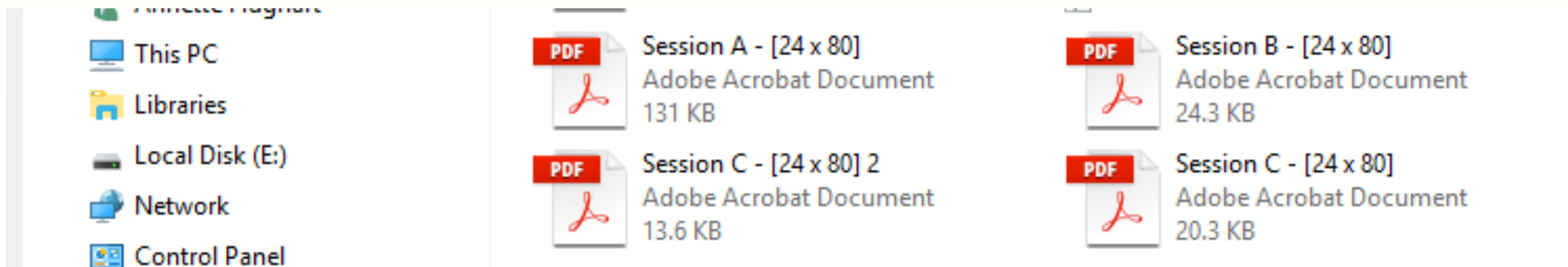
Print WVEIS Reports to PDF Instead of Printer



- Open WVEIS printer session.
- Left click on **File**, then **Printer Setup**.
- In the printer dropdown choose **Adobe PDF** (this will be an option if you have Adobe Pro) or **Microsoft Print to PDF**.

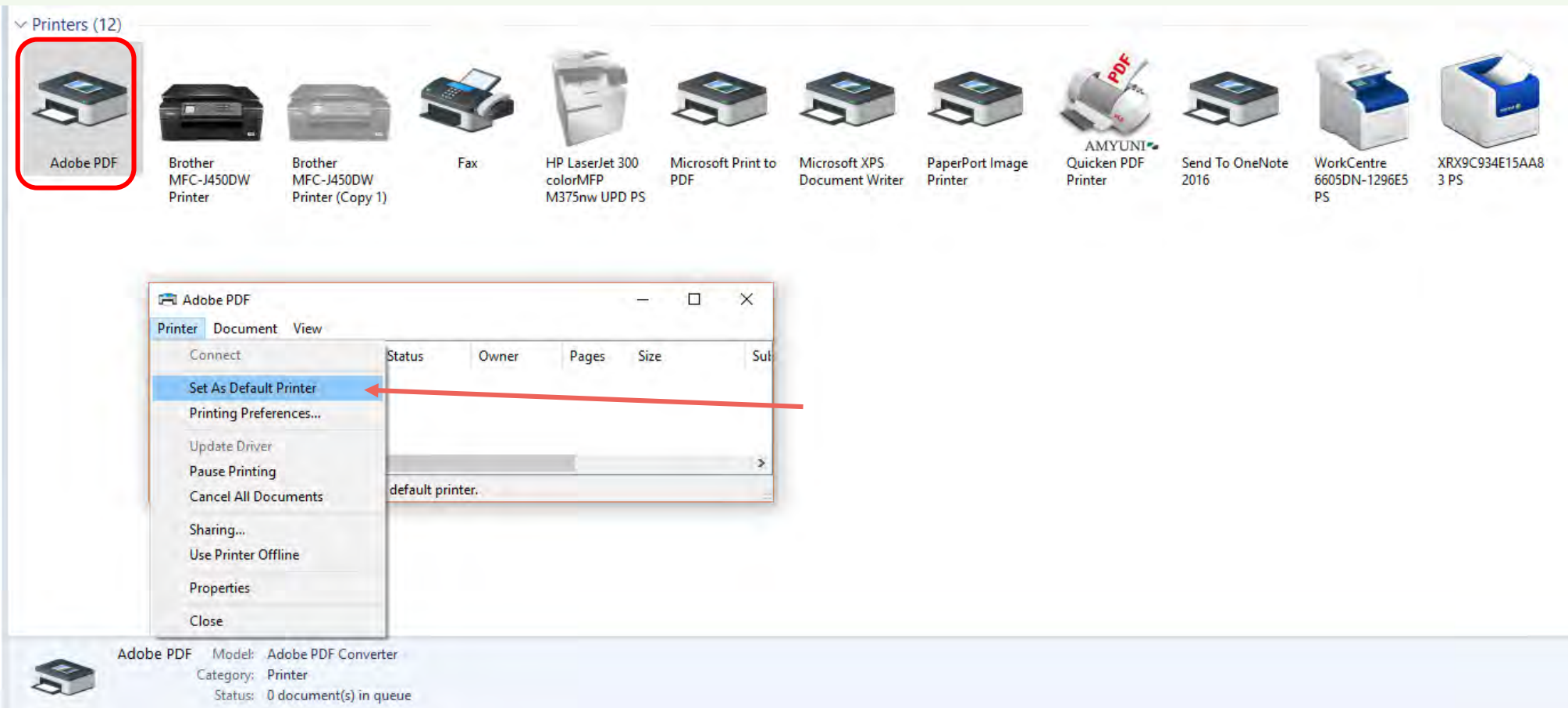
Set-Up Dummy Files on Desktop to Print WVEIS Report

- Sometimes when we print WVEIS reports we don't need to keep them. We may be just checking balances or looking at account detail.
- Set-up dummy files on desktop to print WVEIS reports to when the files don't need saved with a specific name.
- I have two WVEIS green screens and one WVEIS printer screen. The dummy file names I have set-up on my desktop are the same names of each of the WVEIS screens:



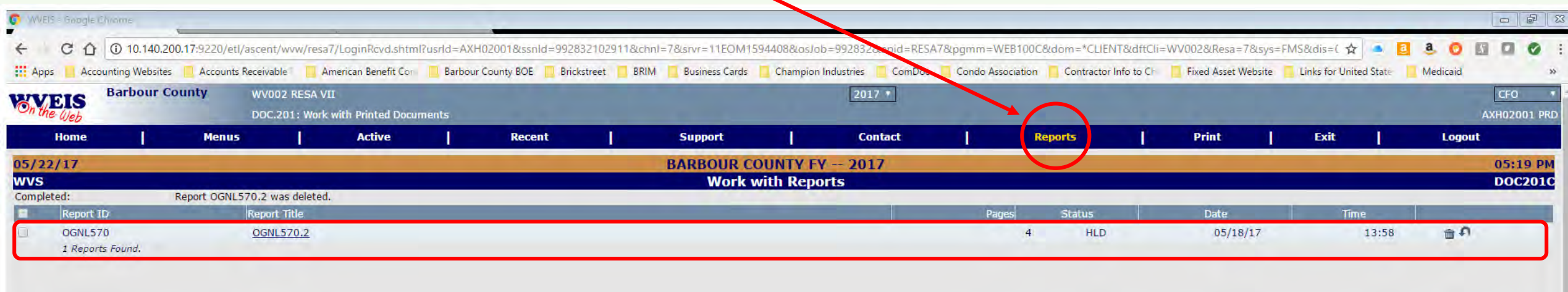
Default Print Drivers to Print to PDF

- In the Windows search field in the bottom left hand corner of computer screen, type Devices and Printers.
- Double click on the Printer named Adobe PDF.
- In the Adobe PDF Printer window, click on Printer, then "Set As Default Printer". This will print all programs to PDF instead of an actual printer.



Print WVEIS Reports to PDF through WVEIS WOW

- It is possible to print WVEIS green screen reports to PDF through WVEIS WOW. I can't take credit for this one, Ann Bell gets the credit for this tip.
- Run your report in WVEIS green screen and put the report on hold.
- Open WVEIS WOW and go to the "**Reports**" Tab and you will see the report that you put on hold in the green screen.



The screenshot shows the WVEIS WOW interface. The 'Reports' tab is highlighted in the navigation bar. Below the navigation bar, the page title is 'BARBOUR COUNTY FY -- 2017' and the subtitle is 'Work with Reports'. A table lists the reports, with one report highlighted in red:

Report ID	Report Title	Pages	Status	Date	Time
OGNL570	OGNL570.2	4	HLD	05/18/17	13:58

Below the table, it says '1 Reports Found.' A red arrow points from the 'Reports' tab to the table.

- Now click on the report.

Print WVEIS Reports to PDF through WVEIS WOW (contd.)

- This is the screen that comes up when you click on the report in WVEIS WOW.

OGNL570 - Google Chrome
10.140.200.17:9220/etl/Reports/temp/AXH02001/OGNL570-170323-074723.pdf

OGNL570 1 / 4

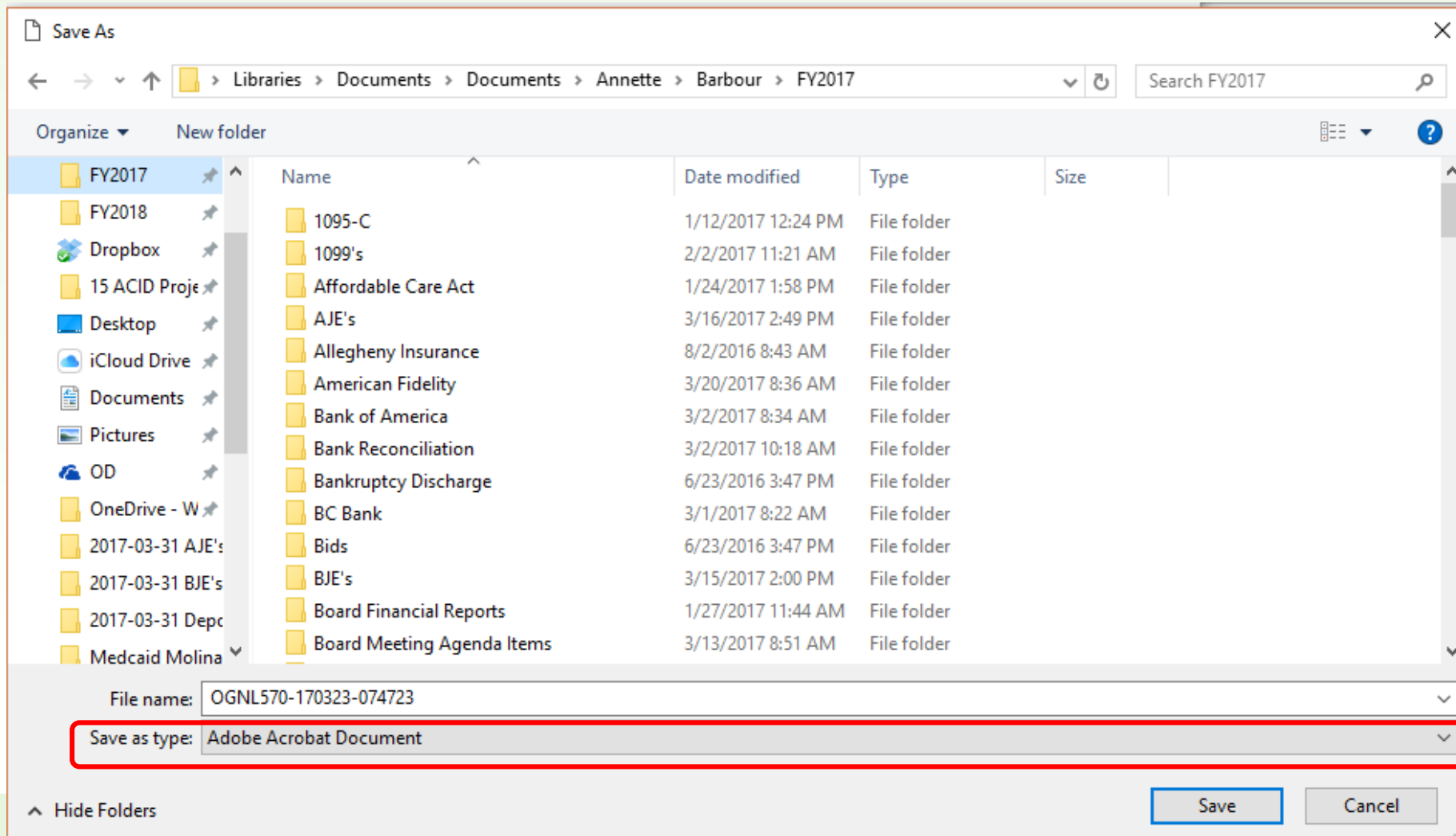
DATE - 3/23/17 BARBOUR COUNTY SCHOOLS PAGE 1
TIME - 7:47:23 DAILY FINANCIAL STATEMENT
FROG - GNL 570
REPT - DAILY FINANCIAL March 31, 2017

ACCOUNT NUMBER / TITLE	YEAR-TO-DATE EXPENDITURES	ENCUMBRANCES	BUDGET	AVAILABLE BALANCE
FUND 11 COUNTY BOARD				
11.00000.XXXXX.XXX.XXX.XXXX.XXXX.XX UNRESTRICTED PROJECTS	10,242,423.92	6,229,470.21	20,912,756.34	4,440,862.21
11.00011.XXXXX.XXX.XXX.XXXX.XXXX.XX SUMMER SCHOOL	202.64	.00	202.64	.00
11.00026.XXXXX.XXX.XXX.XXXX.XXXX.XX ENERGY CURTAILMENT	2,687.82	.00	10,946.00	8,258.18
11.00083.XXXXX.XXX.XXX.XXXX.XXXX.XX MEDICAID	67,759.48	9,014.70	76,774.18	.00
11.00085.XXXXX.XXX.XXX.XXXX.XXXX.XX FACULTY SENATE IN HIRING	345.55	.00	345.55	.00
11.00189.XXXXX.XXX.XXX.XXXX.XXXX.XX CLEARING ACCOUNT	24,816.89	1,420.07	34,282.94	8,045.98
11.XXXXX.XXXXX.XXX.XXX.XXXX.XXXX.XX COUNTY BOARD	10,338,236.30	6,239,904.98	21,035,307.65	4,457,166.37
FUND 41 PERMANENT IMPROVEMENT				
41.00000.XXXXX.XXX.XXX.XXXX.XXXX.XX UNRESTRICTED PROJECTS	70,749.50	51,210.89	687,693.69	565,733.30
41.XXXXX.XXXXX.XXX.XXX.XXXX.XXXX.XX PERMANENT IMPROVEMENT	70,749.50	51,210.89	687,693.69	565,733.30
FUND 51 BUILDING PROJECTS				
51.00000.XXXXX.XXX.XXX.XXXX.XXXX.XX UNRESTRICTED PROJECTS	.00	.00	48,003.81	48,003.81
51.25610.XXXXX.XXX.XXX.XXXX.XXXX.XX SBA-PERFORMANCE CONTRACT	1,781,295.00	.00	4,561,605.88	2,780,310.88
51.25630.XXXXX.XXX.XXX.XXXX.XXXX.XX BCBOE-PERF CNTRCT PORTION	992,390.52	.00	2,448,352.31	1,455,961.79
51.25710.XXXXX.XXX.XXX.XXXX.XXXX.XX SBA - PBHS CONNECTION	28,076.84	7,117.30	372,846.00	337,651.86
51.25730.XXXXX.XXX.XXX.XXXX.XXXX.XX BCBOE PORTION-PBHS CONNEC	1,681.06	882.70	27,154.00	24,590.24
51.XXXXX.XXXXX.XXX.XXX.XXXX.XXXX.XX BUILDING PROJECTS	2,803,443.42	8,000.00	7,457,962.00	4,646,518.58
FUND 61 SPECIAL REVENUE FUND				
61.00000.XXXXX.XXX.XXX.XXXX.XXXX.XX UNRESTRICTED PROJECTS	.00	.00	475,080.46	475,080.46
61.01602.XXXXX.XXX.XXX.XXXX.XXXX.XX STEP 7 - TECHNOLOGY	7,197.18	5,200.60	19,826.62	7,428.84
61.01605.XXXXX.XXX.XXX.XXXX.XXXX.XX STEP 7 - INSTRUC TRAVEL	3,441.04	.00	3,441.04	.00
61.01607.XXXXX.XXX.XXX.XXXX.XXXX.XX STEP 7-TRAVEL/STUDNT SRVS	2,917.68	3,274.09	6,191.77	.00
61.01614.XXXXX.XXX.XXX.XXXX.XXXX.XX STEP 7 - PHILIPPI ELEM	756.00	.00	756.00	.00
61.01620.XXXXX.XXX.XXX.XXXX.XXXX.XX STEP 7 - FRED EBERLE	4,500.00	.00	4,500.00	.00
61.01701.XXXXX.XXX.XXX.XXXX.XXXX.XX	60,154.21	37,267.79	97,422.00	.00

Click the Download Arrow.

Print WVEIS Reports to PDF through WVEIS WOW (contd.)

- This should be the screen that comes up to save the file as a pdf. The Save as type should come up as Adobe Acrobat Document.



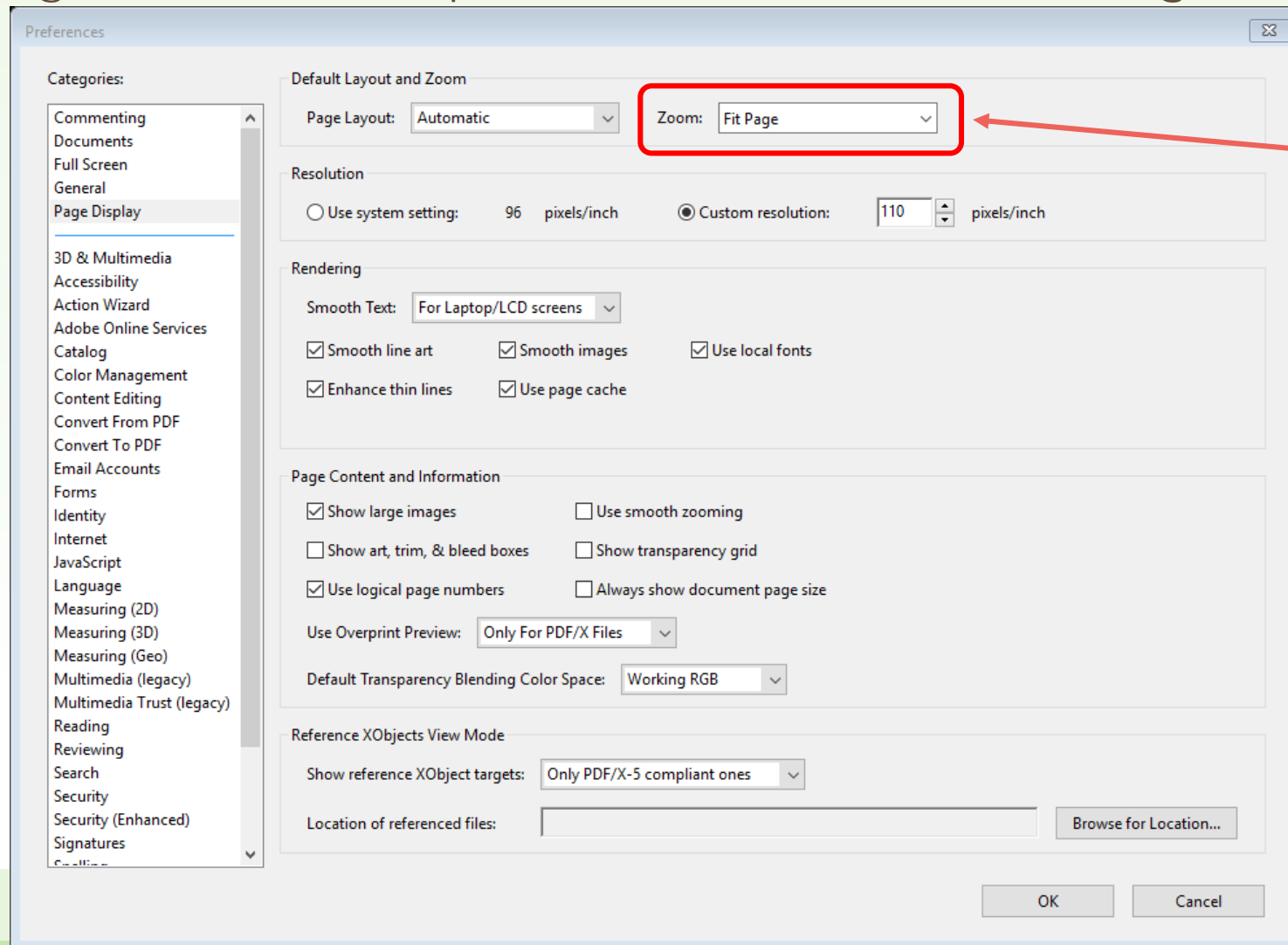
Do you ever just wanna
grab someone by the
shoulders look them
deep in the
eyes and
whisper...



"No one
gives a
SHIT"

Adobe Acrobat Files Open WAY TOO LARGE

- It used to drive me crazy to open an Adobe Acrobat file only to have it display REALLY LARGE.
- There is a way to change the zoom when Adobe Acrobat Pro opens files.
- In Adobe Acrobat Pro, go to **Edit** in the top tool bar, then **Preferences, Page Display**. Change **Zoom** to "Fit Page".



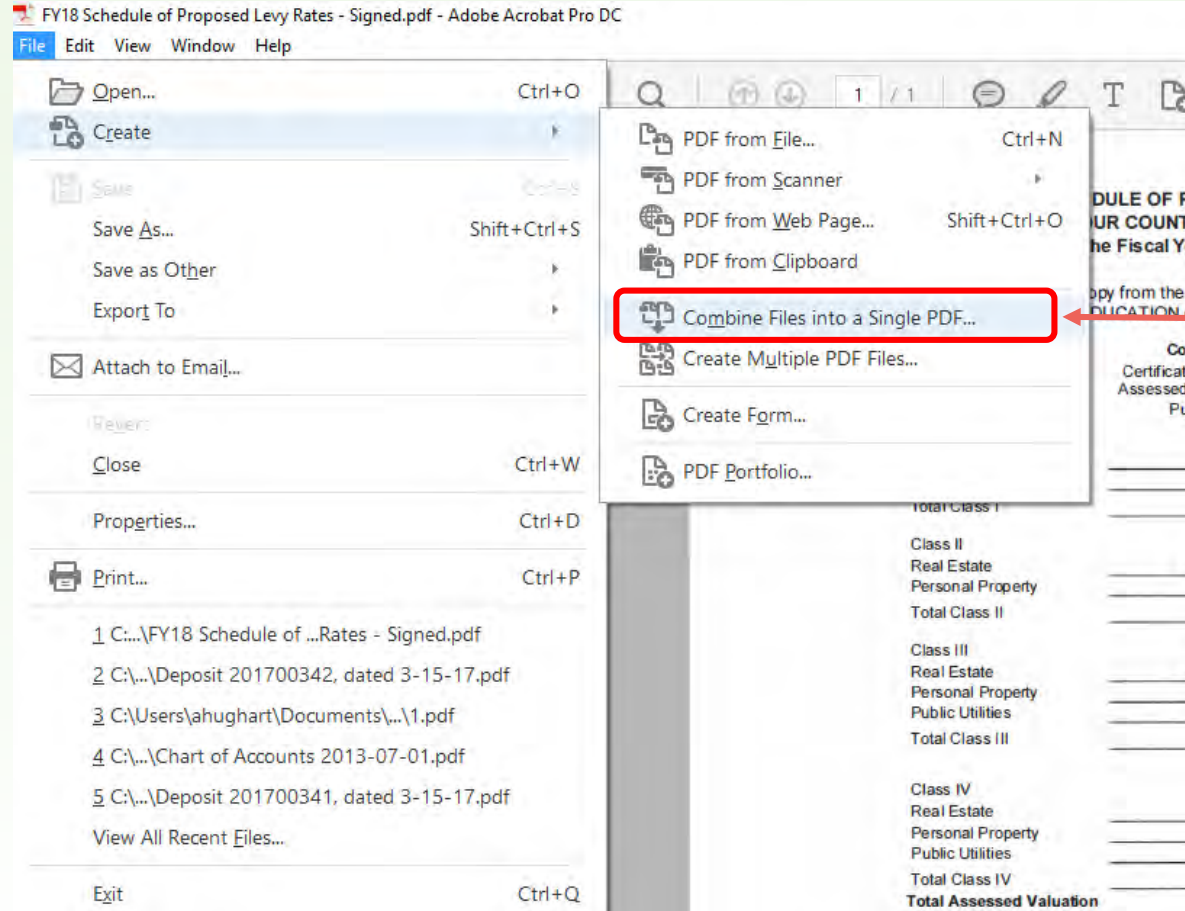
Adobe Pro Bookmarks and Links

- I can't say enough positive things about Adobe Pro. I couldn't live without it.
- Bookmarks are a great feature when you use files electronically.
- Our Chart of Accounts is a good example:
- [Chart of Accounts](#) (*right click and select Open Hyperlink*)
- Our Board Agenda's are done in PDF using Adobe Pro with links throughout [Ag.03.13.17.pdf](#)
- The Educator Price for Adobe Acrobat Pro DC is \$119.00, http://www.adobe.com/products/catalog/software_sl_id-contentfilter_sl_catalog_sl_education_sl_alledu.edu.html?start=10
 - If the \$119.00 doesn't show up on the website, call them, it is available. Sometimes the monthly fee amount only shows up but you can buy it out right for \$119.00.
- The program is worth the cost. You will save that much just in paper and toner.

**WHEN YOU REALLY
WANT
TO SLAP
SOMEONE,
DO IT
AND
SAY
"MOSQUITO"**



Combining Multiple Files into a Single PDF



- The next slide is a video of combining multiple files of different types into a single PDF.



Adobe Pro

- To replace existing pages in an Adobe file, open the **Page Thumbnails**, then in the Thumbnails highlight the pages you want to replace (make sure replacement pages are the same number of pages), then **right click** on the thumbnail highlighted pages and choose, **Replace Pages**.
- Extracting pages from an Adobe file is done through the **Page Thumbnails** as well. Just right click and choose **Extract Pages** and the highlighted pages will open in a separate file, then you can save the extracted pages in a new file.
- Delete pages can also be done through the **Page Thumbnails**. Right Click and choose **Delete Pages**. This will delete the pages that you highlighted in the thumbnail.
- Page Labels can be used to number pages through the **Page Thumbnails**. Right Click and choose **Page Labels**.
 - I use this feature on all of my year-end work papers. Instead of at the top where it would say 1 of 6 pages, mine will say A-1, A-2, A-3, etc. which correspond to other work paper tick marks.



**I MAY LOOK
CALM.
BUT IN
MY HEAD
I'VE
KILLED
YOU
ABOUT
5 TIMES.**

Multiple Monitors

- To go paperless, you will need multiple monitors. I have 3 27-inch curved monitors.
 - Curved monitors flow better for the eyes and have become pretty cheap.
- Even with 3 monitors, there are times I need 6 but manage with 3.
- It is best to have all of your monitors the same size.
- It becomes cumbersome to have monitors of different sizes since moving a screen from one monitor to another monitor will require you to more than likely resize the screen to fit the monitor.
- When all monitors are the same size, you can slide a screen to a different monitor and not have to resize the screen.
- The next slide is a picture of my monitors. You will notice that the center screen is an HDMI (clarity is much better). I need to order adapters for the other two monitors to make them HDMI.

Picture of Monitors



How to Extend the Screen for a Laptop Connected to a Projector

- When connecting your laptop to a projector for a business presentation, you can display the screen image in a variety of ways, such as sending the image only to the projector or projecting the same image to both screens. However, to maximize your available screen area, extend your screen so the laptop and projector each display a portion of the overall image. [Extending your screen lets you keep windows on your laptop screen and only drag them to the projector screen when they become relevant.](#)
- Click the Windows orb on the taskbar to open the Start menu.
- Type "**screen resolution**" into the search box in the lower-left corner of the Start menu. A list of search results automatically appear on the left side of the Start menu. Click "**Adjust screen resolution**" in the list of search results to open the Screen Resolution dialog box.
- Click the drop-down box labeled "**Multiple displays**" to open a drop-down menu.
- Click "**Extend these displays**" to expand your screen across the laptop and projector.
- Click "OK" to apply your changes and close the dialog box.