“APS” for CM’s
Advancing Productivity Seminar

Microsoft Office 101 for CM’s
Time-Saving Tips that Every CM Should Know

February 6, 2015
Call In #: (855) 201-9213 Code: 772 193 4966

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What is CMAA?

- Construction Manager’s Association of America
- Mission to promote the CM profession
- Use qualified CM’s on capital projects
- Professional accreditation (CMIT/CCM)
- 11,000 member firms & individuals
CMAA New England Chapter

Established in 1991

510 members / 60 CCM’s

Our Mission
The Mission of CMAA is to promote the profession of Construction Management and the use of qualified Construction Managers on capital projects and programs.

Our Vision
The Vision of CMAA is that all owners will realize capital project and program success by using professionally qualified Construction Managers.
CMAA New England Events

- Monthly Breakfast Programs on a variety of topics
- Owners’ Forum Luncheon (4-5 Public & Private Owners with focus on their CIPs’)
- Annual Project Awards (applications, evaluations, and Awards ceremony)
- Scholarships for CM Students from 5 area colleges/universities
- Professional Certification Classes
- Construction Legislation Tracking & Alerts
- Seasonal Newsletters
- Annual Golf Outing for CM Student Scholarships
- Young Member Committee (project site visits and socials)
CMAA NE – Young Members

Facilitate Knowledge Sharing Between Generations
• Breaking Down Generation Barriers
• Balance Experience & Technical Knowledge
• Professional Certifications

Improved Appeal to “Generation-Y”
• Innovative Event Styles
• Adapt to Younger CM’s Preferences
• Maintain Professionalism

Target Membership
• Students
• Young CM Professionals
• Open to Members of All Ages & Experience Levels
Introducing “APS” for CM’s

A – Advancing
P – Productivity
S – Seminar

Upcoming Events:

February 6, 2015 at 12:00PM – 1:00PM
Microsoft Office 101 for CM’s
Time-Saving Tips that Every CM Should Know

May : Scheduling Software 101 for CM’s
Aug : Document Control 101 for CM’s
Nov : Estimating and Risk 101 for CM’s
2016: Going Beyond the Basics

Yup... There’s an app for that!
Introducing “APS” for CM’s

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Today’s Agenda:

Microsoft Office
Microsoft Office

General Office Tips

• Microsoft ID
• Cloud Saving
• Add-On Applications
• Templates
Microsoft Office
MICROSOFT ID

Your account, our priority
Adding security information helps protect your account

Sign in

Microsoft account What's this?
someone@example.com

Password

Keep me signed in

Sign in

Can't access your account?
Sign in with a single-use code

Don't have a Microsoft account? Sign up now

CMAA
Advancing Professional Construction and Program Management Worldwide
Microsoft Office

CLOUD SAVING
Microsoft Office
ADD-ON APPLICATIONS

And Then
Microsoft Word

Uses in Construction

- Proposals
- Transmittals
- Reports
- Contracts
- Business Cards
Microsoft Word

TIP #1: KEYBOARD/CLICKING FEATURES

- Hold Ctrl + Click w/ in Sentence = Selects Single Sentence
- Hold Alt + Double Click = Selects Entire Table
- Hold Alt + Click a Word = Definition and Synonyms
Microsoft Word

TIP #1: KEYBOARD/CLICKING FEATURES

- Type an Asterisk + Click the Spacebar = Creates a Bullet List

- Double Clicking a Word = Selects a Single Word

- Triple Clicking a Word = Selects an Entire Paragraph
Microsoft Word

TIP #2: BOOKMARK FEATURE

Step 1: Select the text that you’d like to Bookmark.

Step 2: Click Insert tab and then Bookmark.
Microsoft Word

TIP #2: BOOKMARK FEATURE

Step 3: Give your bookmark a name and click Add.

Step 4: Save file.

Accessing saved Bookmarks:
Insert tab then Bookmark (Step 2), find Bookmark and click Go To.
Microsoft Word

TIP #3: MULTIPLE LAYOUT FEATURE

Step 1: Place cursor at beginning of the page to convert into landscape layout.

Step 2: Click Page Layout tab, then Breaks dropdown and Next Page.
Microsoft Word

TIP #3: MULTIPLE LAYOUT FEATURE

Step 3: Insert another section break at the position where your landscape layout ends. (Repeat Step 2).

Step 4: Place cursor on page you want to change layout.

Step 5: Click “Page Layout” tab and then the tiny arrow appearing on the right corner.
Microsoft Word

TIP #3: MULTIPLE LAYOUT FEATURE

Step 6: Select Landscape as Orientation, and select This Section from the “Apply to” list.

Save 7: Save file.
Microsoft Excel

Uses in Construction

• Data Analysis
• Graphic Analysis
• Conditional Formatting
• Cost Estimating
• Budget Tracking
• Manpower Trend Analysis
• Change Order Risk Analysis
Microsoft Excel

TIP #1: KEYBOARD/CLICKING FEATURES

- **ALT** + **CTRL** + **CLICK/DRAG** = **AUTO SUM**
  - **ALT**
  - **CTRL**
  - **CLICK/DRAG**
  - **AUTO SUM**

- **COPY NEW TAB**
Microsoft Excel

TIP #2: TRACE PRECEDENTS & DEPENDENTS
Microsoft Excel

TIP #3: FILTERING BY COLOR OR TEXT
Microsoft Excel

TIP #4: PIVOT TABLES
Microsoft Excel

TIP #4: PIVOT TABLES

Choose the data that you want to analyze
- Select a table or range
  - Table/Range: Sheet1!$A$1:$F$214
- Use an external data source
  - Choose Connection...
  - Connection name:

Choose where you want the PivotTable report to be placed
- New Worksheet
- Existing Worksheet
  - Location:

Drag fields between areas below:
- Report Filter
- Column Labels
- Row Labels
- Values

Example fields:
- Country
- Product
- Sum of Amount

Update

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Microsoft Excel

TIP #5: CONDITIONAL FORMATTING
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Step 1: Create Column A as Step, Column B as Start Date, Column C as End Date, and Column D as Duration.

Step 2: Label cells F1 to AB1 as dates for the schedule.

Step 3: In the Home tab, Styles group, click Conditional Formatting and then ‘New Rule.’
Microsoft Excel

TIP #5: CONDITIONAL FORMATTING

Step 4: Select “Use a formula to determine which cells to format.”

Step 5: Type the formula

\[ =\text{AND}(E1>=B2, E1<C2) \]

Step 6: Click Format to choose fill color. Click OK.
Microsoft PowerPoint

Uses in Construction

- Presentations
- Photo Reporting
- Flyers
- Labels
Microsoft PowerPoint

TIP #1: KEYBOARD/CLICKING FEATURES

- **Hold Ctrl + Click M** = Inserts Slide w/Same Layout
- **Select slide from preview on left + Hold Ctrl + Click D** = Duplicates Selected Slide
- **Hold Shift + Click F9** = Toggle Grid on and off
Microsoft PowerPoint

TIP #1: KEYBOARD/CLICKING FEATURES

Click F5 = Starts Slide Show at 1st Slide

Hold Shift + Click F5 = Starts Slide Show at Current Slide

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Example: Google

**Step 1:** Select the object (text or graphic) you want to turn into a hyperlink.

**Step 2:** Right-click the object and choose Hyperlink.
Microsoft PowerPoint

TIP #2: LINKING FEATURES

Step 3: Insert URL in address box, and click OK.

Step 4: Save file.
Microsoft PowerPoint

TIP #3: PRESENTER VIEW FEATURES

Step 1: Click Slide Show tab and make sure Use Presenter View is checked.
Microsoft PowerPoint

TIP #3: PRESENTER VIEW FEATURES

Step 2: Once you go into the Slide Show, Presenter Viewer appears.
Microsoft Outlook

Uses in Construction

- Organize E-Mails
- Manage Tasks
- Manage Calendar
- Maintain Contact List
- Organize Project Correspondence
Microsoft Outlook

TIP #1: KEYBOARD/CLICKING FEATURES

- CTRL + Q = MARK AS READ
- CTRL + R = REPLY
- CTRL/S + R = REPLY ALL
Microsoft Outlook

TIP #2: CREATING RULES

❖ Conditions:
  ▪ From certain sender
  ▪ Subject contains
  ▪ Sent to

❖ Actions:
  ▪ Display in New Item Alert window
  ▪ Play a selected sound
  ▪ Move item to specified folder
Microsoft Outlook

TIP #3: ASSIGNING TASKS

Start and Due Dates

Set Up Reminders

Status and Priority Level

Percent Complete

TIP #3:
ASSIGNING TASKS

Microsoft Outlook

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Start and Due Dates

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Percent Complete
Microsoft Outlook

TIP #4: READING PANE
Microsoft OneNote

• Take notes efficiently
• Improves organizational skills
• Create to-do lists
• Tag and find important items
• Create tables & charts (which can be sent to Word or Outlook!)
• Hyperlinks to anywhere
• Print to OneNote
• Many more!
Introducing “APS” for CM’s

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P – Productivity
S – Seminar

Thank You

Visit us on the web:
cmaa-ne.org

Visit us on LinkedIn:
CMAA New England Chapter Young Members