

How to Become A Microsoft Power User For Proposals



*Presented by Emily Arnold, AOC Key
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Speaker Information



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- Emily Arnold is a Proposal Development Specialist with AOC Key Solutions, Inc. (KSI), a leading consulting firm that helps companies win government contracts.
- She has worked in a variety of proposal development roles, including management, coordination, writing, editing, and desktop publishing for large and small businesses.
- Ms. Arnold is APMP Foundation Certified and was recently named a 2020 recipient of the APMP 40 Under 40 Award.

What We'll Cover Today

How to Become a Microsoft Power User for Proposals

- **Learn how to make your technology and tools work better for you.**
 - ▶ Basic Components & Terminology
 - ▶ Hotkeys, Shortcuts, & Commands
 - ▶ Practical Applications: Graphics, Desktop Publishing, & Production

BASIC COMPONENTS & TERMINOLOGY

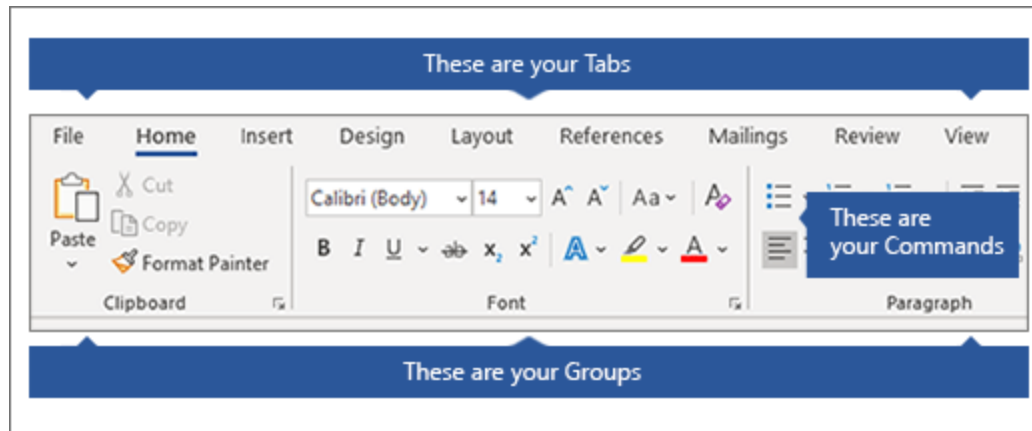


Basic Tools in MS Office

- **Start with the Basics & Tailor your own Toolbelt**
- **Understanding the Basic Components of MS Office and Windows**
 - ▶ Ribbon
 - ▶ Quick Access Toolbar
 - ▶ Navigation Pane
 - ▶ Style Menu
 - ▶ Other Tools

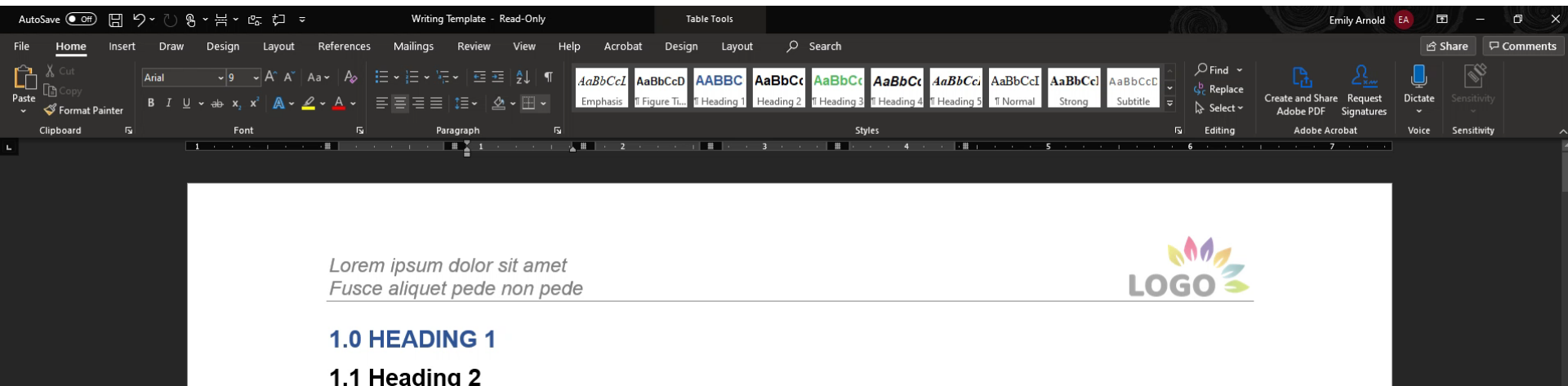
Basic Tools in MS Office

- **Ribbon:** The command bar across the top of any Office software that holds all of the default buttons and tabs
 - ▶ Tabs, Groups and Commands
 - Some tabs are contextual (Header & Footer Tools)
 - ▶ The Ribbon is customizable



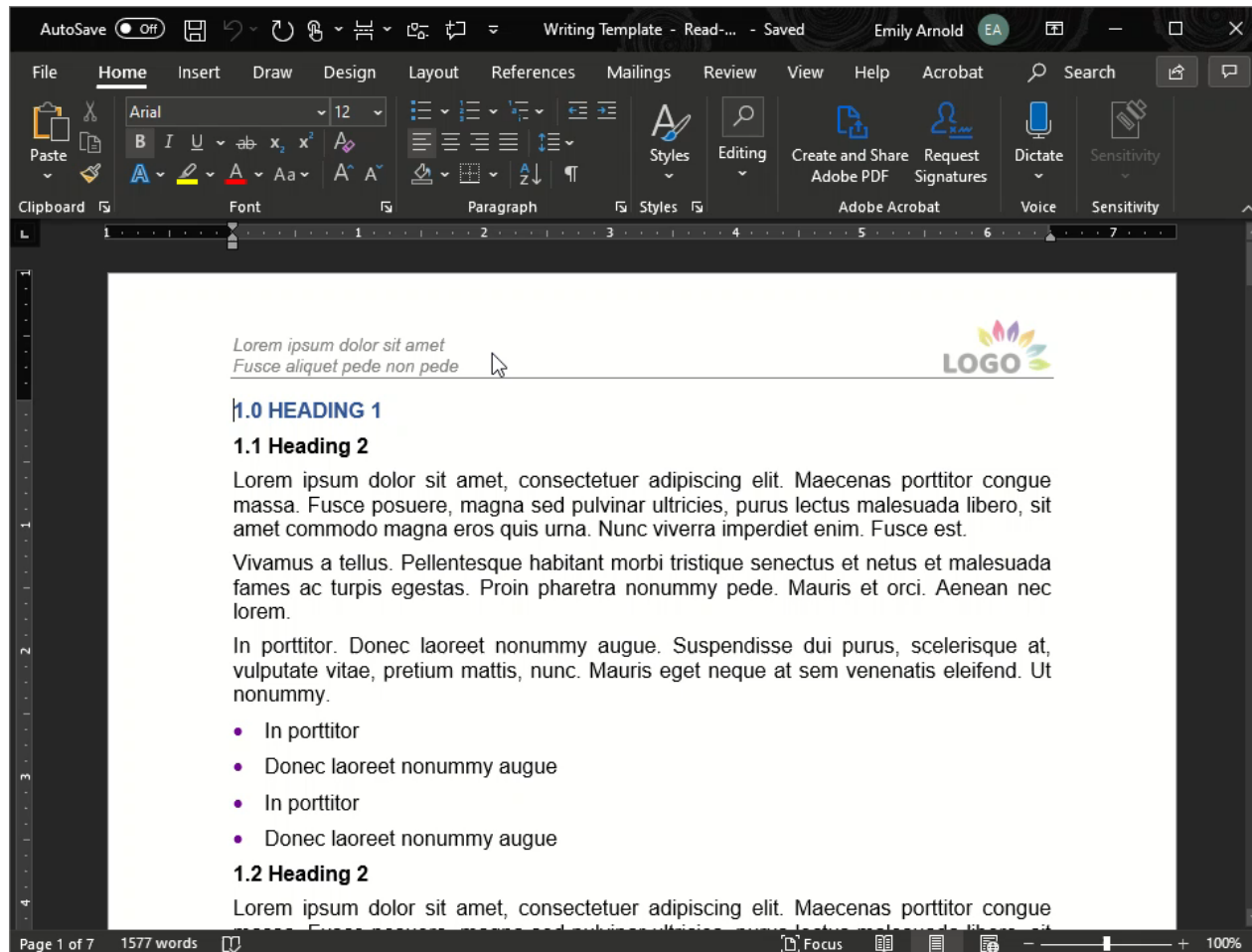
Basic Tools in MS Office

- Turning the Ribbon on/off



Basic Tools in MS Office

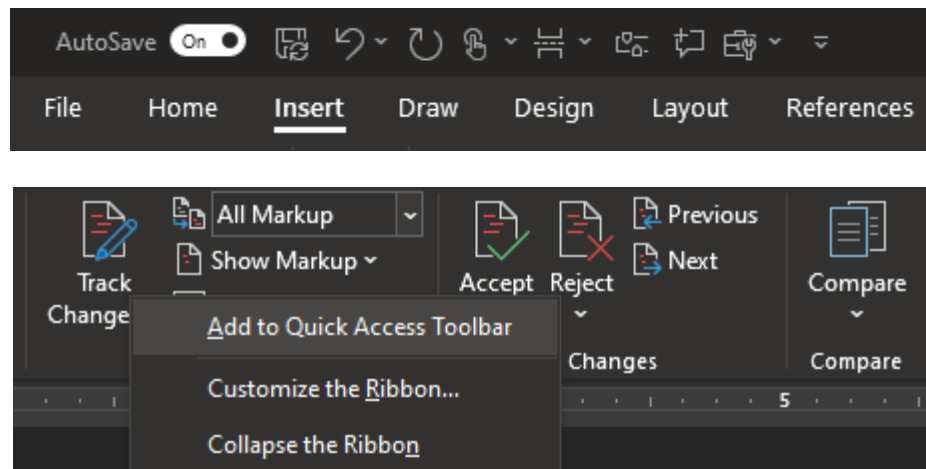
- Customize the Ribbon



Basic Tools in MS Office

- **Quick Access Toolbar**

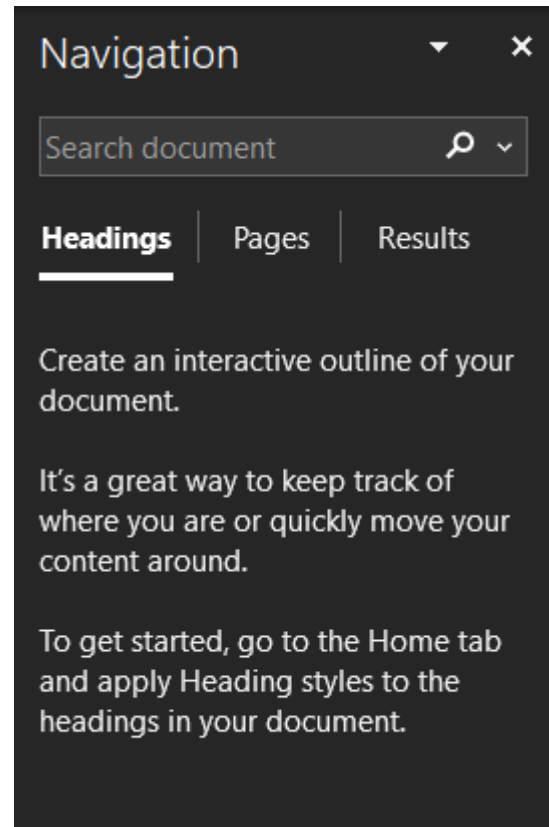
- ▶ By right clicking most commands (“buttons”) in office software, you can add these to the top bar of your program
- ▶ I find it useful to use comments, track changes, and insert page/section break in word



Basic Tools in MS Office

- **Navigation Pane and Searching**

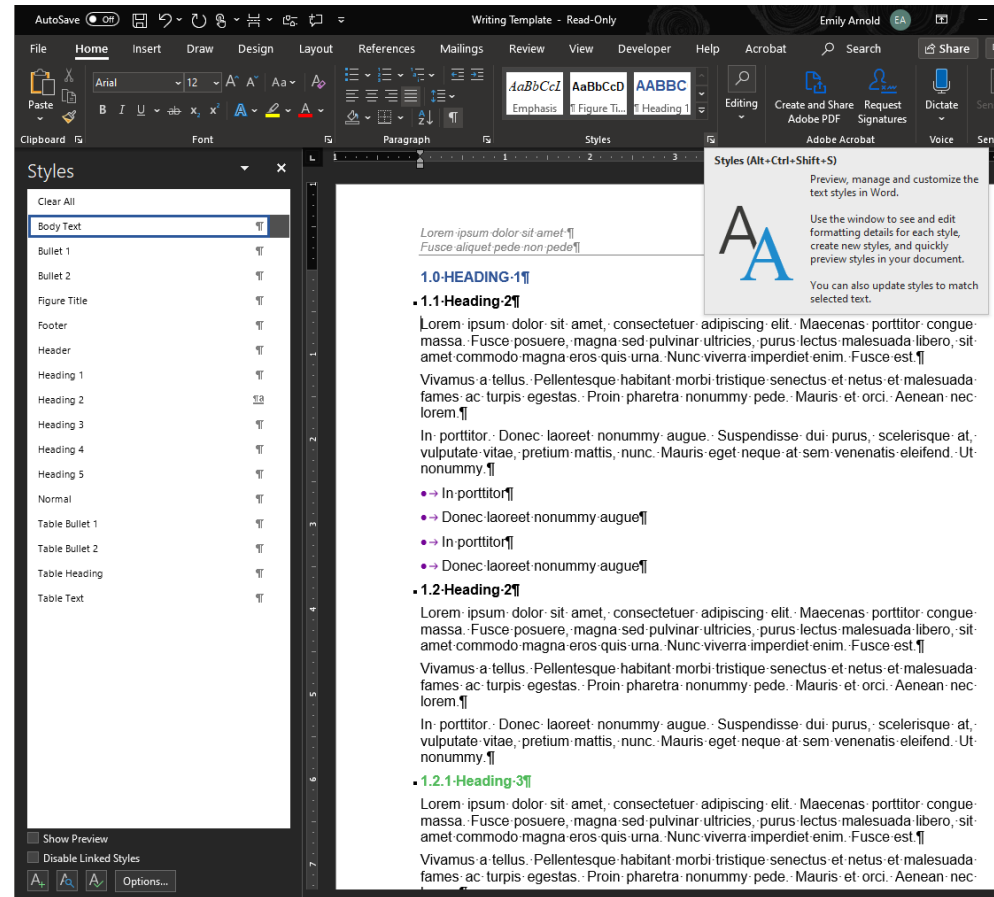
- ▶ Headings
- ▶ Pages
- ▶ Results



Basic Tools in MS Office

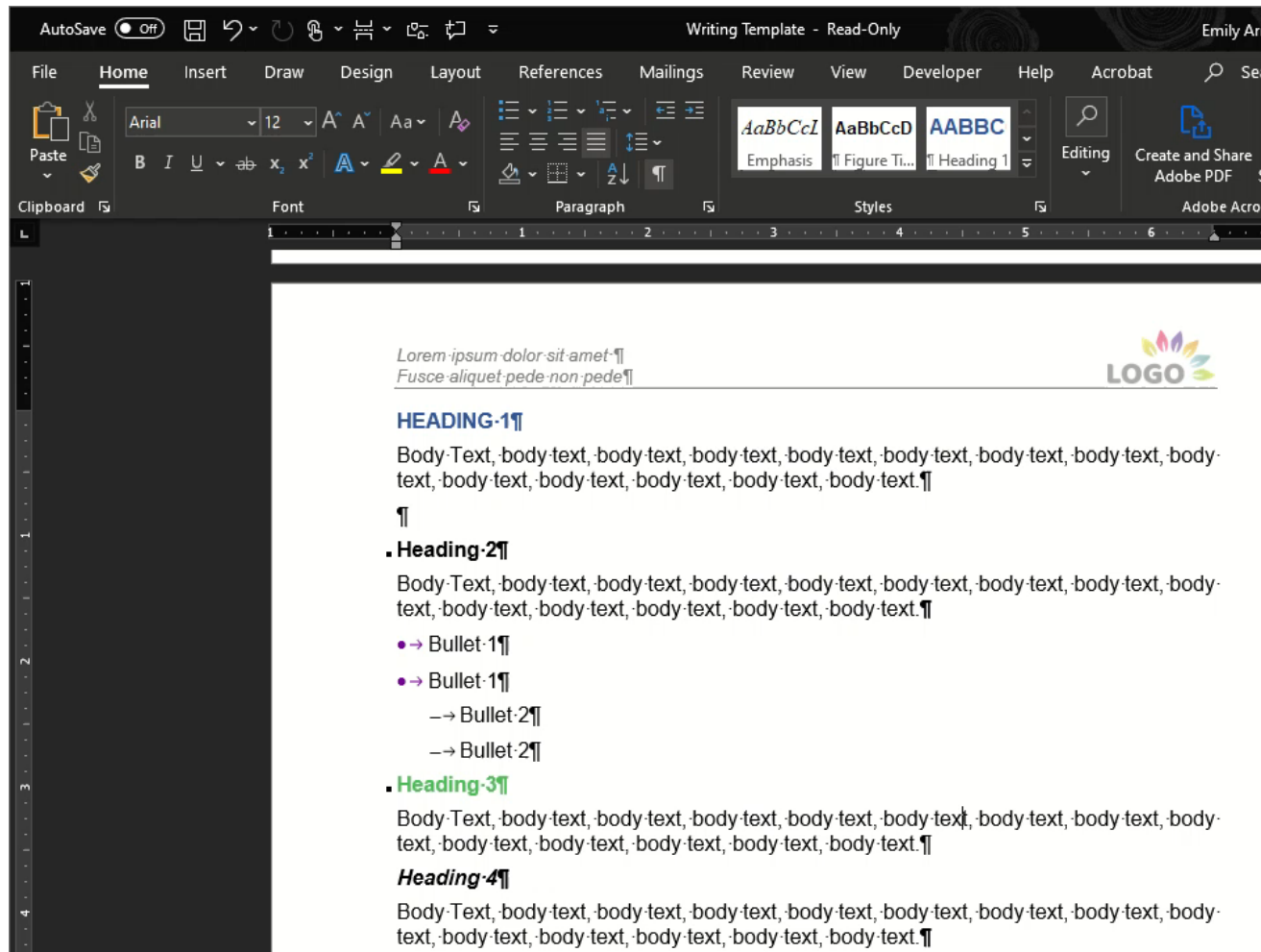
- **Style Pane**

- ▶ Rely on styles vs direct formatting for consistency and ease of updates
- ▶ Be careful when creating your own styles; this can involve a complex set of interdependencies



Basic Tools in MS Office

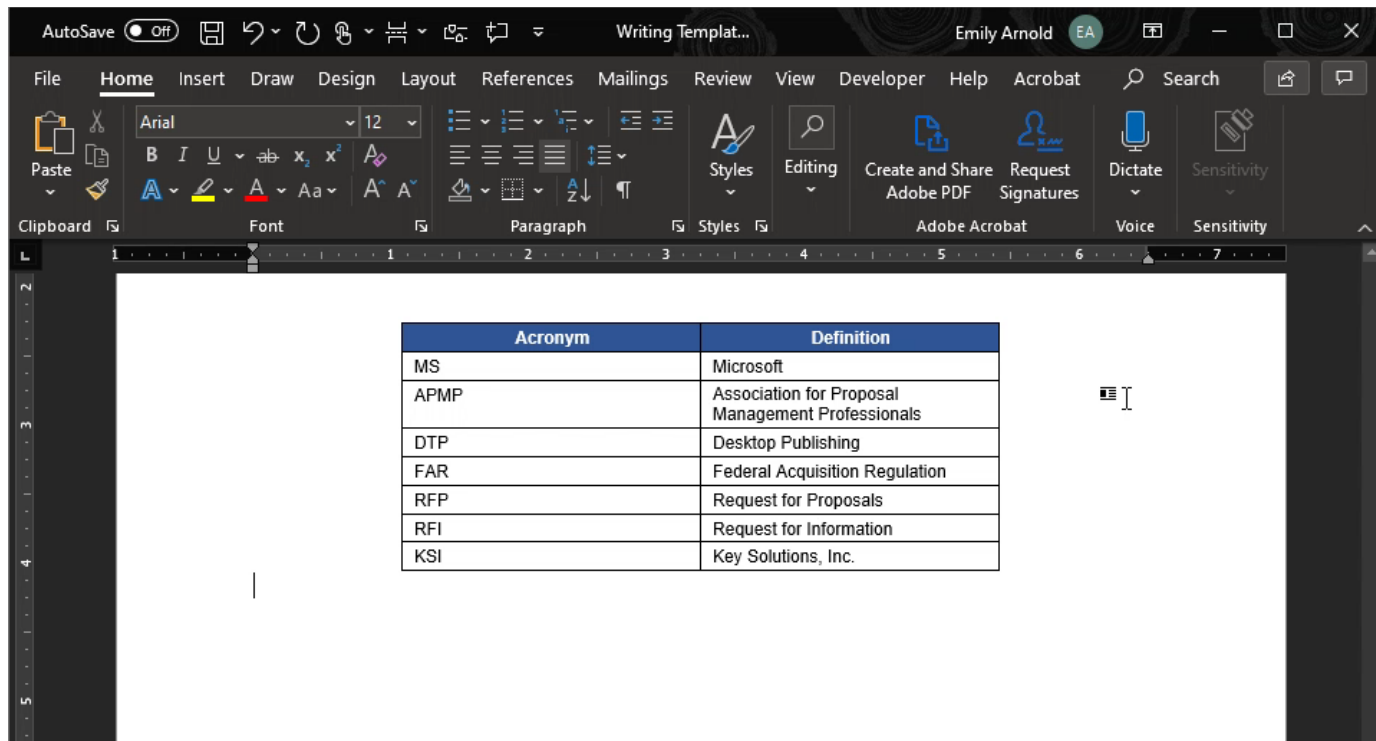
- Style Pane



Additional Tools

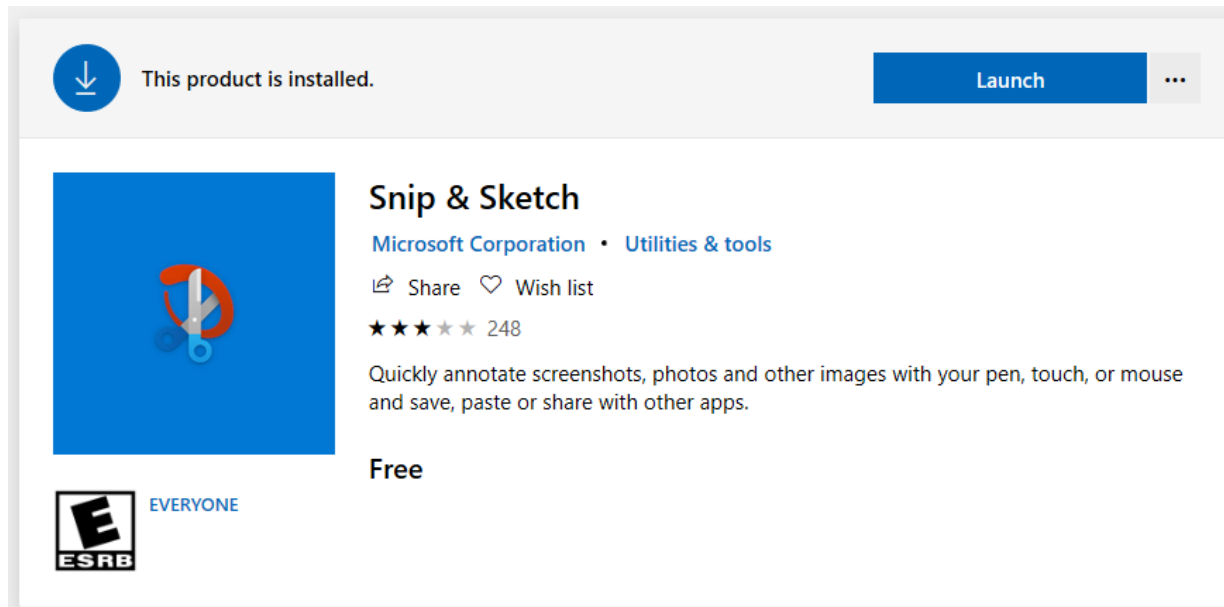
- **Sort Tool**

- ▶ In MS Word, this is found in the Paragraph Group
- ▶ Can also be found in Excel
- ▶ Useful for glossaries



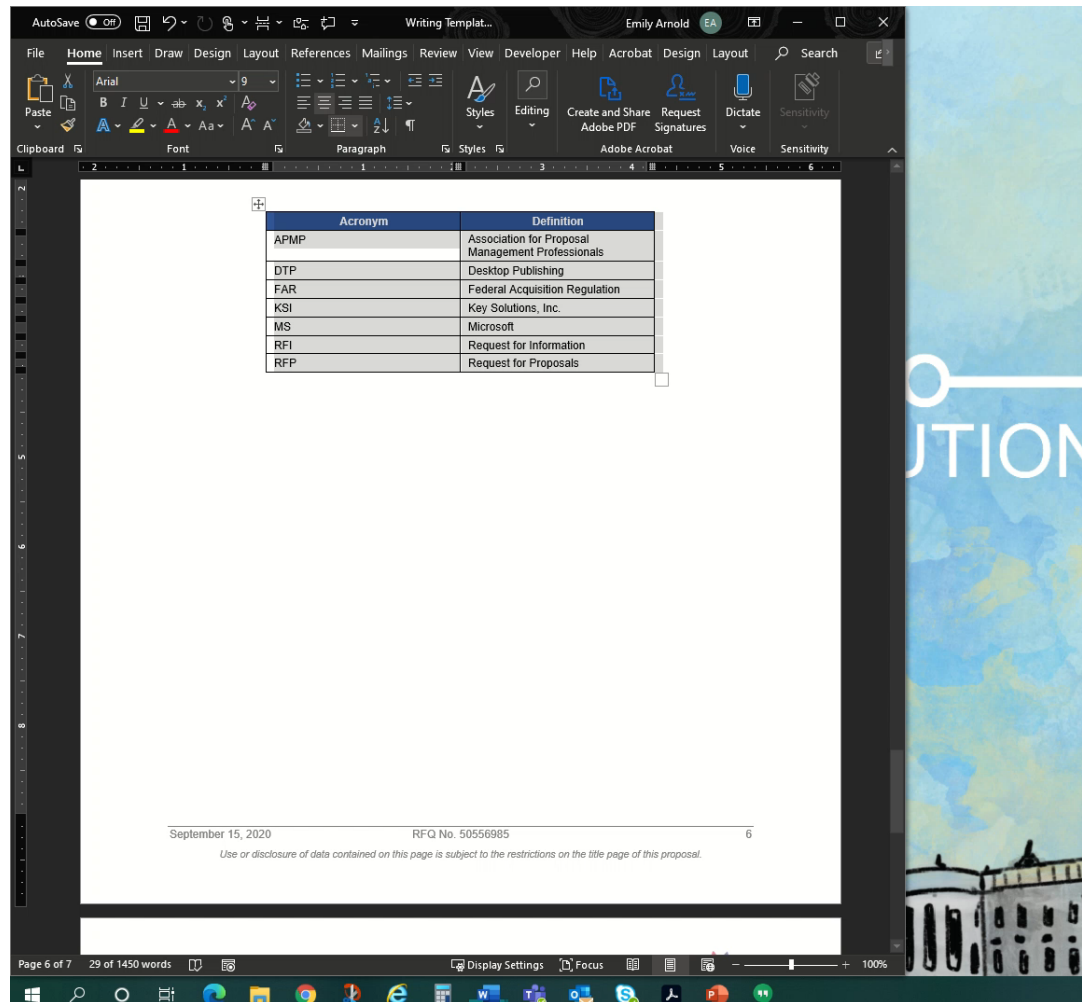
Additional Tools

- **Snip & Sketch (formerly Snipping Tool)**
 - ▶ This is useful for screenshots, markup
 - ▶ Avoid the bloatware! This is included in Windows



Additional Tools

- Snip & Sketch (formerly Snipping Tool)



HOTKEYS, SHORTCUTS, & COMMANDS



Hotkeys, Shortcuts, & Commands

- **The Basics**

- ▶ Basic Functions

- **Save:** [CTRL + S]
 - [F12] opens dialog box for “save as” in MS Word
 - **New:** [CTRL + N]
 - **Open:** [CTRL + O]

- ▶ Character Formatting

- Can be applied to a selection or toggled on/off prior to typing
 - **Bold:** [CTRL + B]
 - **Italics:** [CTRL + I]
 - **Underline:** [CTRL + U]

Hotkeys, Shortcuts, & Commands

- **Moving/Navigating Content**
 - ▶ **Copy:** [CTRL + C]
 - ▶ **Cut:** [CTRL + X]
 - ▶ **Paste:** [CTRL + V]
 - **Paste as Plain Text:** [CTRL + SHIFT + V]
 - ▶ **Undo:** [CTRL + Z]
 - CTRL Z SAVES LIVES
 - ▶ **Search:** [CTRL + F]
 - In MS Word, this opens the Navigation Pane (Word 2010 and newer)

Hotkeys, Shortcuts, & Commands

- **Moving/Navigating Content**


- ▶ Understanding the Difference between “Move” and “Copy” for Files
 - **Copy:** Analogous to “Copy” for content – can be applied to files
 - **Move:** Analogous to “Cut” above. Can be risky!
 - Move can get interrupted (computer instability, power outage, network failure)
 - You might move files to the wrong location and have issues finding them
 - Keyboard Commands are more reliable than Dragging/Dropping

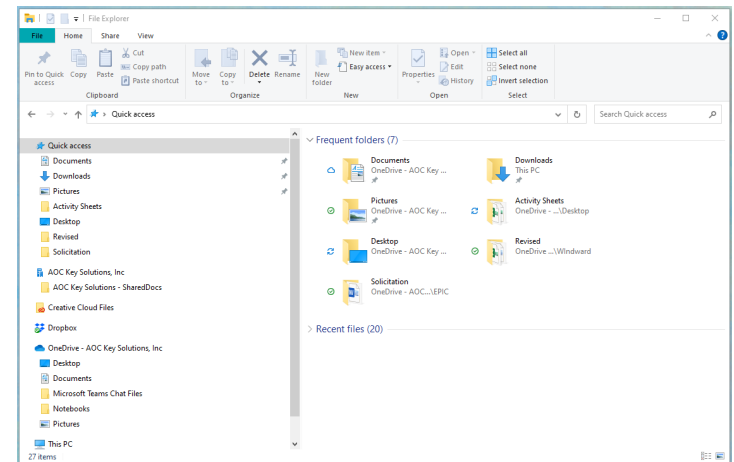
Graphics

	Name ▾	Picture Size ▾	File Size ▾
	Inbox	Open	> items
	Outbox	Preview	5 items
✓	6538 Graphics Template.pdf	Share	60 KB
	Graphic Design Support Guide.docx	Copy link	7.1 KB
		Manage access	
		Download	
		Delete	
		Automate	>
		Rename	
		Move to	
		Copy to	
		Alert me	
		More	>
		Details	

Hotkeys, Shortcuts, & Commands

- **Changing View**

- ▶ **Switch Application:** [ALT + TAB]
- ▶ **Zoom:** [CTRL + mouse scroll]
- ▶ **Launch File Explorer:** [WIN + E]
 - The Windows key is found between CTRL and ALT at the lower left-hand corner of standard windows keyboards: 
- ▶ **Go to Desktop:** [WIN + D]



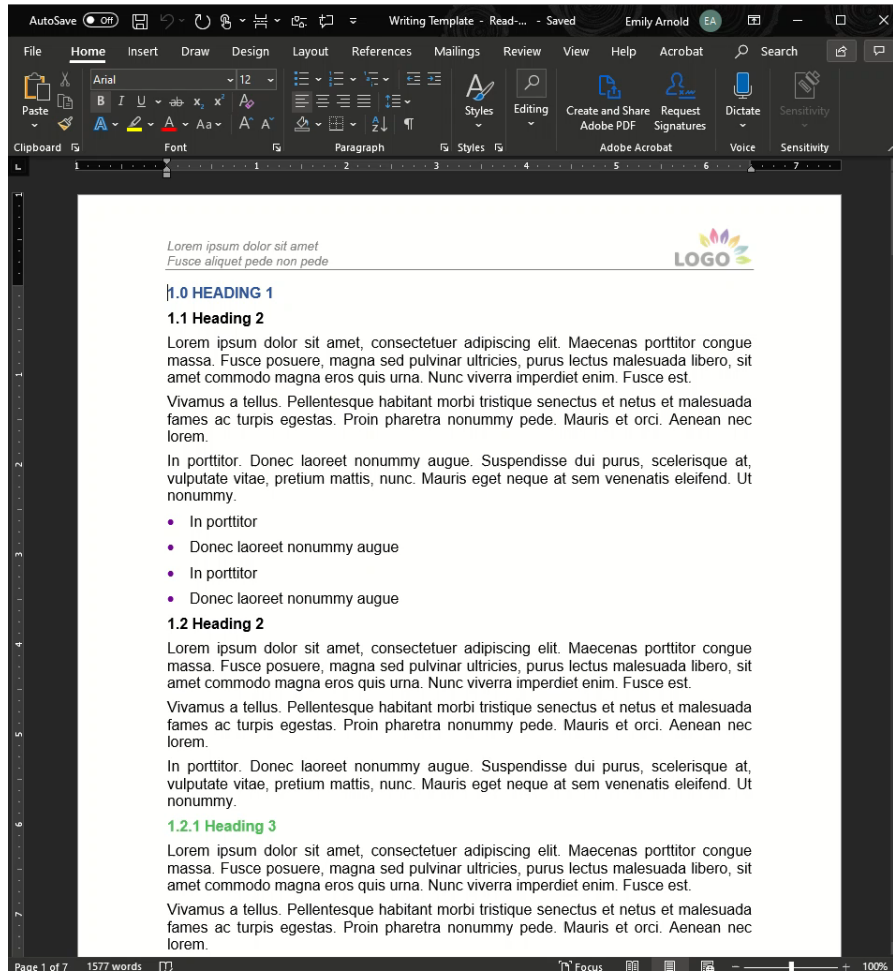
Hotkeys, Shortcuts, & Commands

- **Windows & Arrow Keys**

- ▶ **Maximize:** [WIN + ↑]
- ▶ **Minimize:** [WIN + ↓]
- ▶ **Snap Windows:** [WIN + →] or [WIN + ←] moves side to side
 - **Quarter window:** [WIN + ← ↑] upper left corner (example)
 - Visualize your monitor as having four quadrants; use the arrow keys to move your window to that quadrant while holding WIN.
 - Great for multiple monitor set ups or reviewing multiple documents side by side



Hotkeys, Shortcuts, & Commands



Hotkeys, Shortcuts, & Commands

- **Reviewing/Editing Documents**

- ▶ **Selecting Text:** [SHIFT + ARROW]

- ▶ **Advancing the Cursor:** [TAB]

- [SHIFT + TAB] goes back one field—useful for tables and email

- ▶ **Backspace vs Delete**

- Backspace removes to the left of the cursor; delete removes to the right
 - Backspace eliminates a table; Delete removes the contents (text) but leaves the table shell, applied styles

Hotkeys, Shortcuts, & Commands

- **Reviewing/Editing Documents**

- ▶ **Re-do command:** [F4] (in MS Word)
- ▶ **Subscript:** [CTRL + =]
- ▶ **Superscript:** [CTRL + Shift + plus]
- ▶ **Style Separator:** [CTRL + ALT + Enter]
 - Useful for run-in headings
- ▶ **Toggling Case:** [Shift + F3] for a given selection in MS Word

In porttitor. Donec laoreet nonummy augue. Suspendisse dui vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem nonummy.

SAMPLE TEXT FOR YOUR CONSIDERATION[]

- In porttitor
- Donec laoreet nonummy augue
- In porttitor
- Donec laoreet nonummy augue

1.2 Heading 2

Lorem ipsum dolor sit amet consectetur adipiscing elit. Maec

Hotkeys, Shortcuts, & Commands

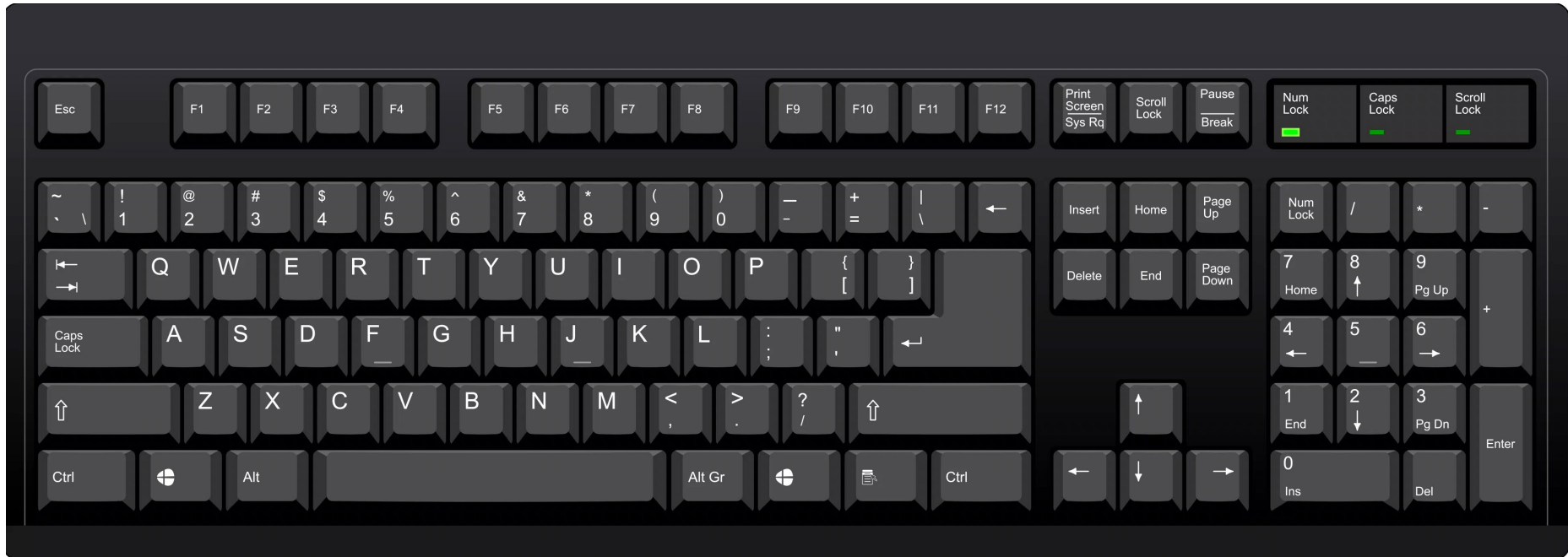
- **Inserting Special Characters**

- ▶ **Hyphen (-) vs En Dash (–) vs Em dash (—)**

- Hyphens for compound adjectives, en dash for range of dates or pages, em dash in place of parentheses, commas, colon for emphasis
 - **En dash:** [ALT + 0150] (on numpad)
 - [CTRL + Minus] (must be minus on numpad)
 - [text(space)-(space)text] results in an en dash with a space on either side as in: text – text.)
 - **Em dash:** [ALT + 0151] (on numpad)
 - [CTRL + ALT + Minus] (must be minus on numpad)
 - [text--text] results in an em dash as in: text—text

Hotkeys, Shortcuts, & Commands

- **Inserting Special Characters**
 - ▶ Example – En Dash



Hotkeys, Shortcuts, & Commands

- **Inserting Special Characters**

- ▶ **Insert a copyright symbol©:** [(C)] or [ALT + CTRL + C]
- ▶ **Insert a registered trademark symbol®:** [(R)] or [ALT + CTRL + R]
- ▶ **Insert a trademark symbol™:** [(TM)] or [ALT + CTRL + T]

In porttitor. Donec laoreet nonummy augue. Suspendisse dui vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem nonummy.

- In porttitor
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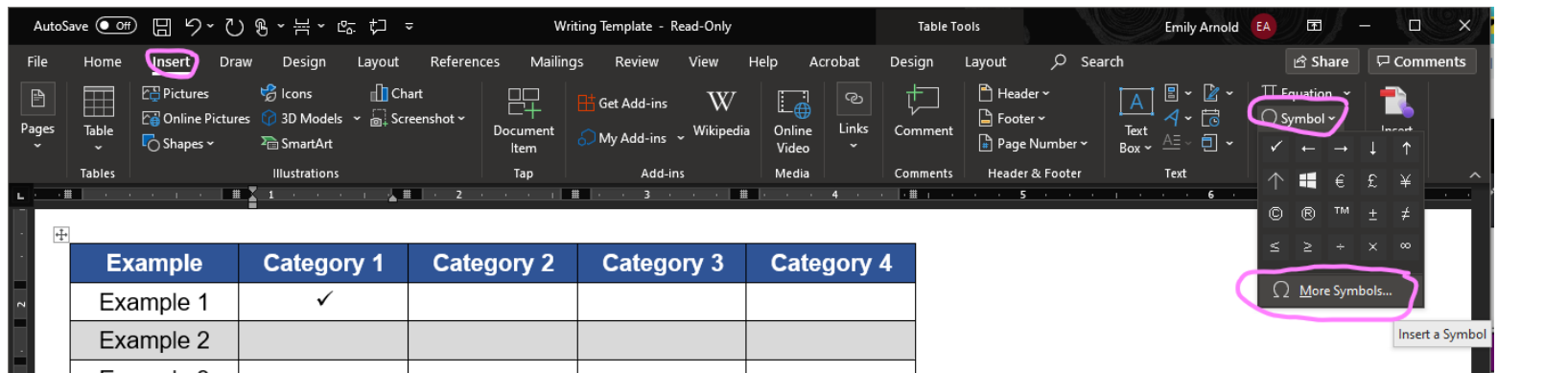
1.2 Heading 2

Lorem ipsum dolor sit amet consectetur adipiscing elit. Maec

Hotkeys, Shortcuts, & Commands

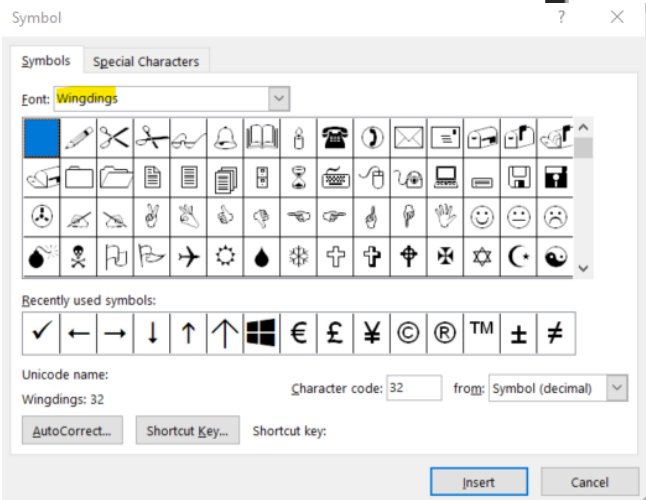
- **Inserting Special Characters**

- ▶ For other symbols, refer to the “insert” tab in the ribbon, then the “symbols” group.



The screenshot shows the Microsoft Word ribbon with the 'Insert' tab selected. The 'Symbols' group is highlighted, and the 'Symbol' dropdown menu is open, showing various symbols and the 'More Symbols...' option.

Example	Category 1	Category 2	Category 3	Category 4
Example 1	✓			
Example 2				
Example 3				
Example 4				
Example 5				
Example 6				



The Symbol dialog box is open, showing the 'Wingdings' font. The 'Recently used symbols' section displays a list of symbols, including the checkmark, arrows, and currency symbols. The 'Unicode name' field shows 'Wingdings: 32' and the 'Character code' is 32.

Hotkeys, Shortcuts, & Commands

- **Additional Commands: Security and Operating Issues**
 - ▶ **Lock Computer:** [WIN + L]
 - ▶ **Open Task Manager:** [CTRL + Shift + ESC]
 - Use the more common [CTRL + ALT + DEL] if your system is completely locked
 - ▶ **Close Active Window:** [ALT + F4]
 - Useful for pop-ups, malware, lost control of your mouse
 - If you're just on your desktop, it brings up the shutdown menu

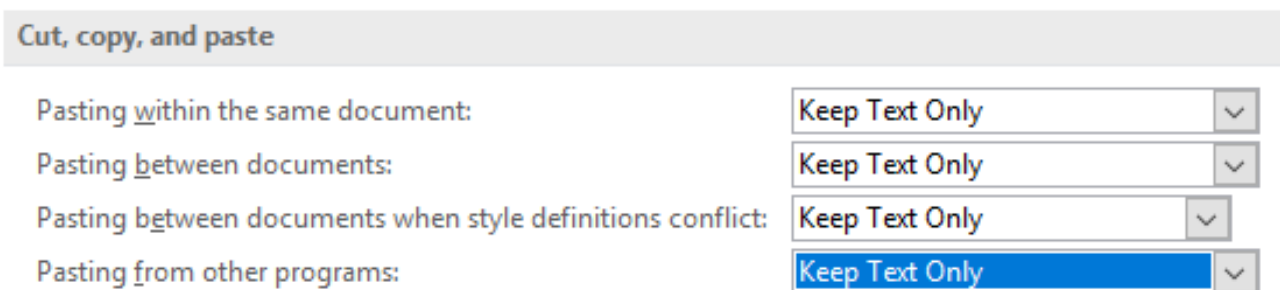
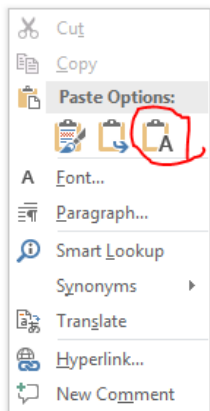
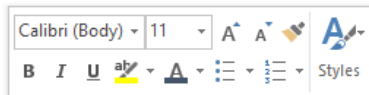
PRACTICAL APPLICATIONS: GRAPHICS, DESKTOP PUBLISHING, & PRODUCTION



Guidelines for Writing/Editing

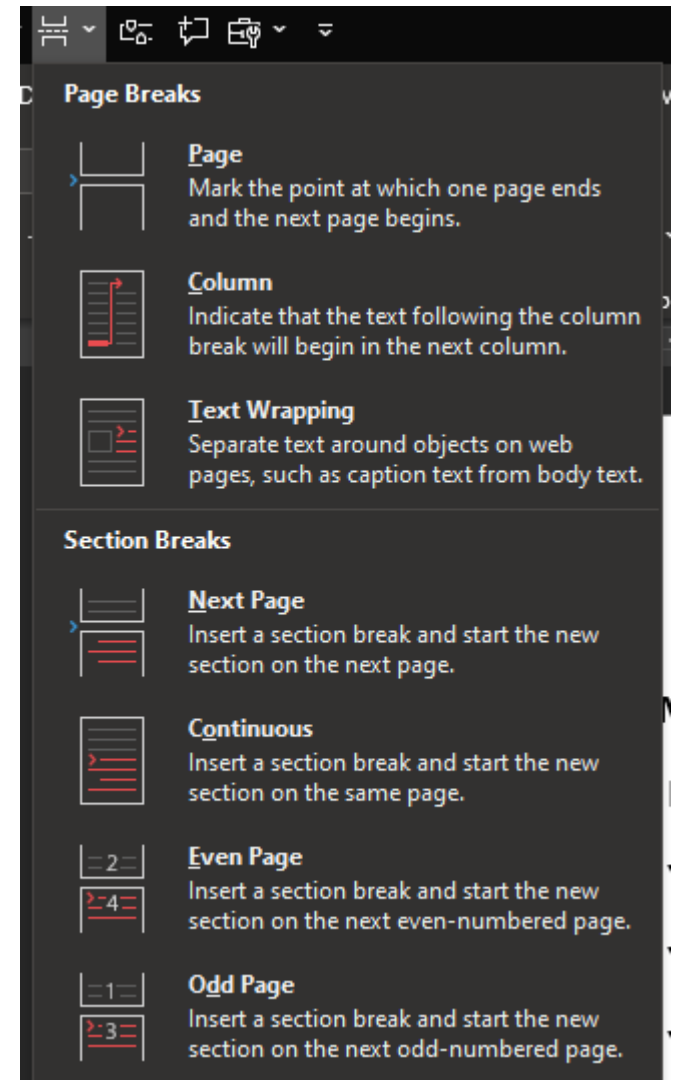
- **Use Paste Special**

- ▶ Use paste special to avoid inadvertently bringing in non-compliant fonts to your document
 - Right Click → “Paste Options”, Click the clipboard with the letter “A”
- ▶ You can set your default paste to be special (without formatting)
 - File → Options → Advanced → Cut, copy, and paste → Set all drop downs to “Keep Text Only”



Guidelines for Writing/Editing: Breaks

- **Page vs Section Breaks**
 - ▶ **Page Breaks** separate content between pages
 - ▶ **Section Breaks** split your document into sections, partitioning the new section from the previous one
 - Next page, continuous
 - Any changes apply from the point of the break to the next section break (or the end of the document)



Guidelines for Writing/Editing: Breaks

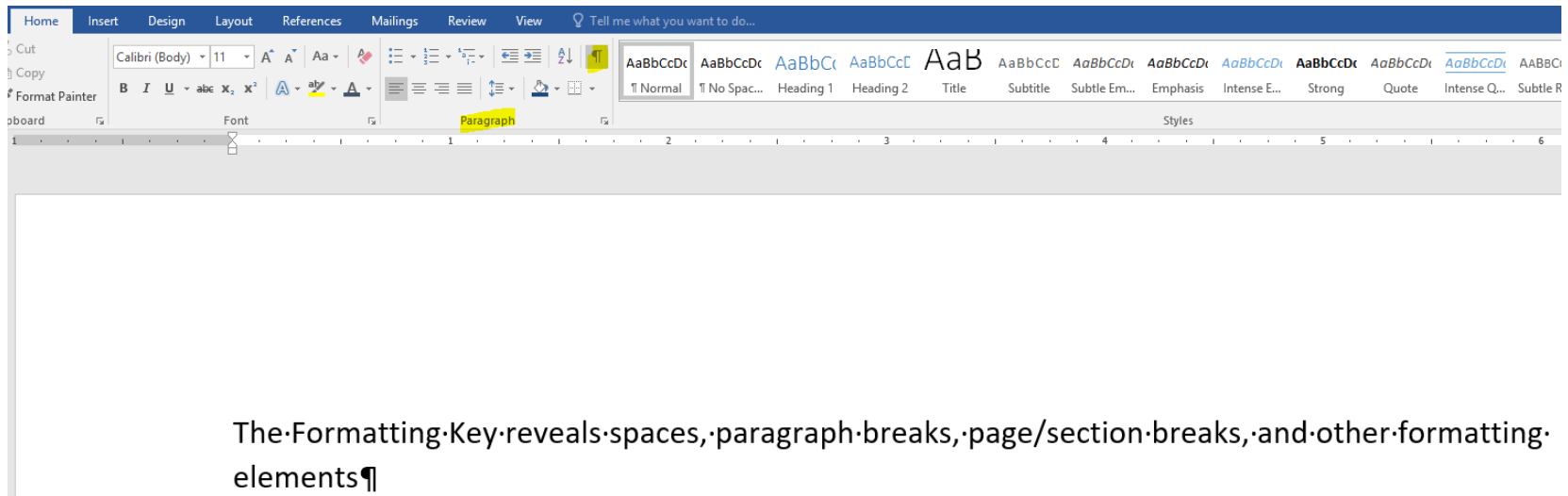
- **Section Breaks**

- ▶ **Useful for:**

- Creating multiple columns for bulleted lists
 - Having a landscape page in the middle of a portrait document
 - Having header/footer changes for new tabs
 - Make sure your header/footer are unlinked to make changes to just that section
 - Click within header/footer → click Header & Footer Tools – Design Tab → Look in Navigation Group → Make sure “Link to Previous” is unselected

Guidelines for DTP: Diagnosing Issues

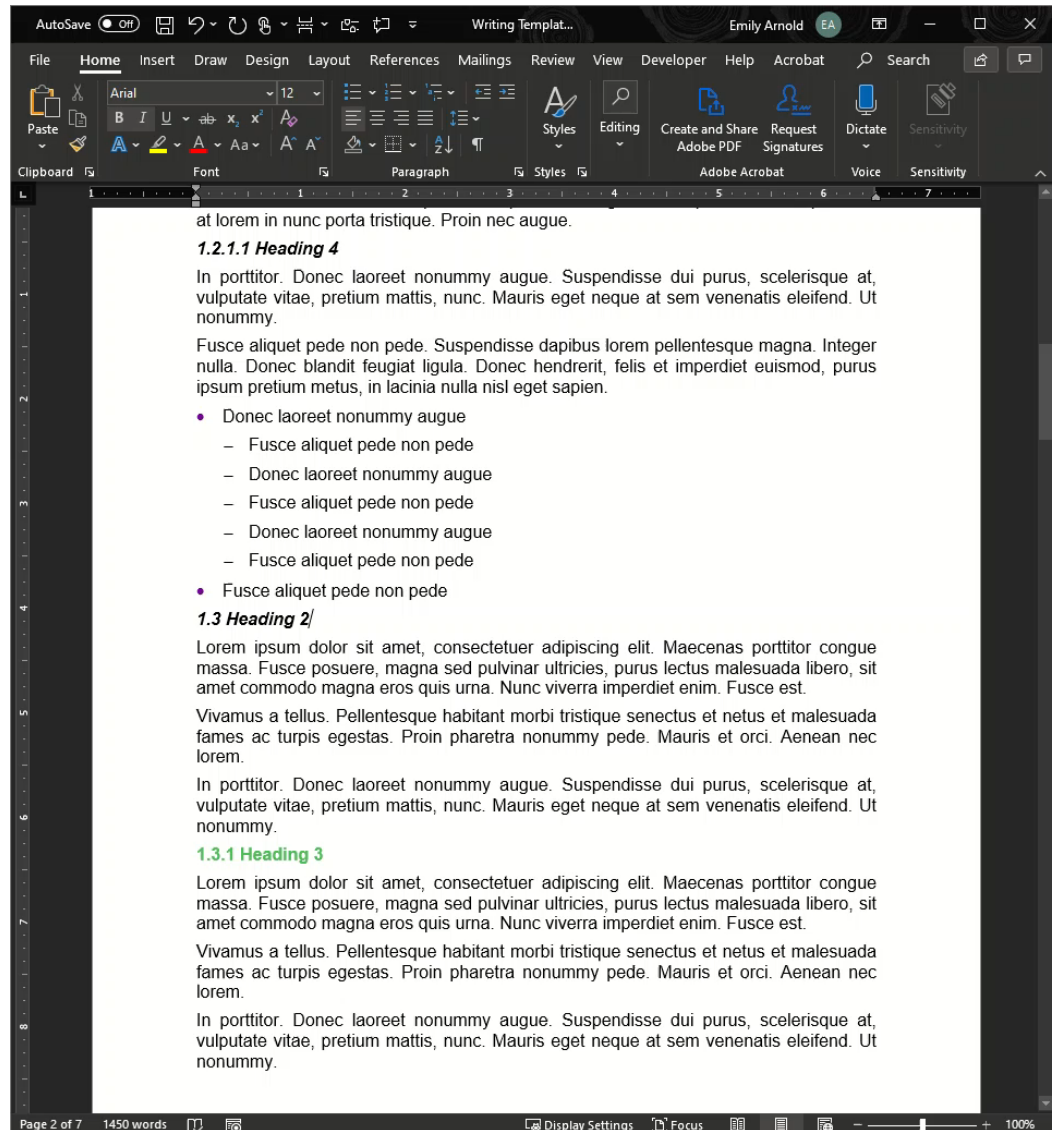
- **Check for Strange Formatting by Showing Formatting Key**
 - ▶ Something strange happening in your document? Turn on the formatting key (¶) to reveal underlying formatting.



The Formatting Key reveals spaces, paragraph breaks, page/section breaks, and other formatting elements¶

Guidelines for DTP: Diagnosing Issues

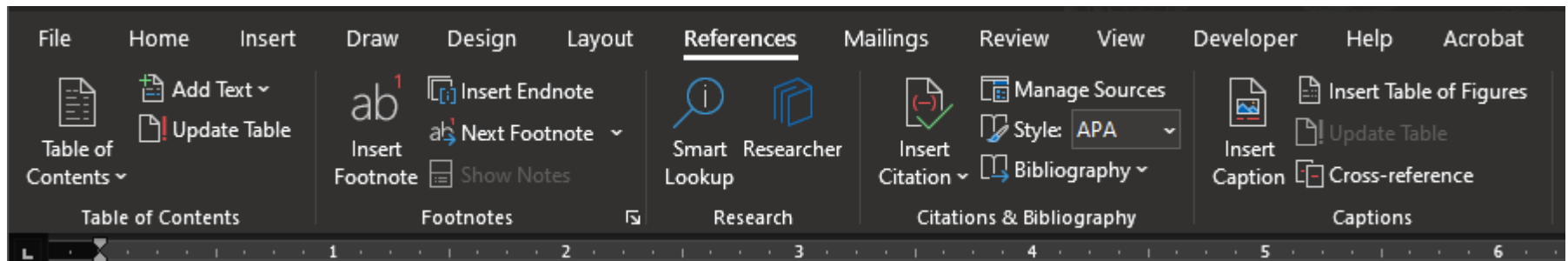
- **Style Inspector**
 - ▶ At the bottom of the style pane, click the button with the magnifying glass
 - Click the next button with the magnifying glass to further “Reveal Formatting”



Guidelines for DTP: Field Codes

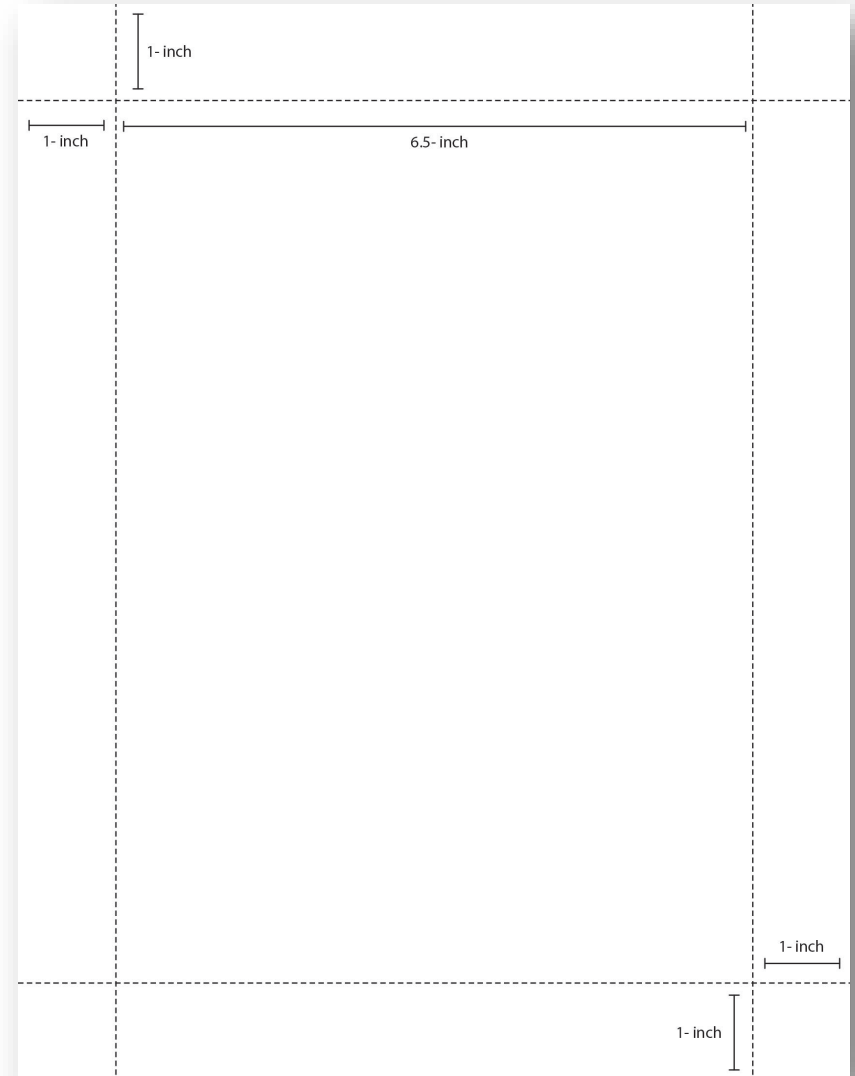
- **Working with Field Codes**

- ▶ Examples of Field Codes: page numbers, tables of contents, captions and figure references
- ▶ Use the Captions group in the References Tab to insert auto-numbered/linked captions and figure references
 - Also useful for creating a list of figures, tables, etc.
- ▶ **Refresh Field Codes: [F9]**
 - [CTRL + A] to select all then [F9] to refresh entire document
 - May have issues for fields that are in frames/text boxes
- ▶ **Remove Field Codes: [CTRL + Shift + F9]**
 - Useful when creating a master table of contents



Guidelines for Sizing & Positioning

- **1. Make the graphic compliant to begin with.**
 - ▶ Tell the graphics artist the requirements for the proposal (font type, size, spacing, margins, etc.)
 - ▶ Good graphics people will know how to set their artboard to fit in your document.
 - ▶ Example: On 8.5x11 sheet with 1-inch margins, a full width graphic will be 6.5 inches wide.

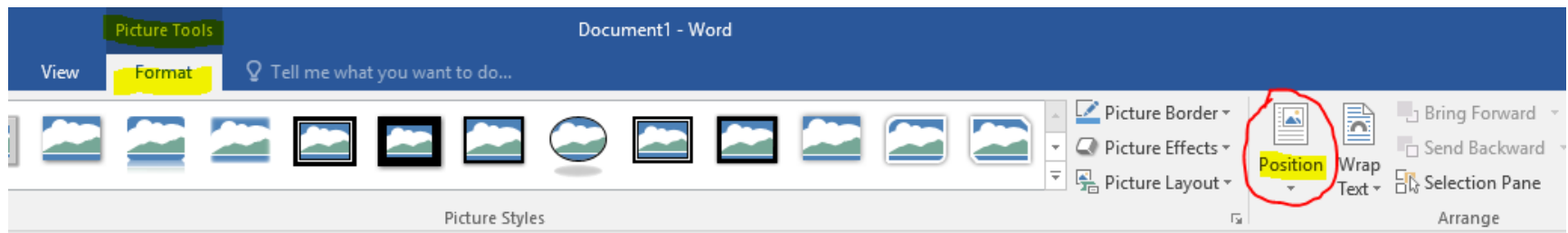


Guidelines Sizing and Positioning

- **2. Keep the graphic at the right size**
 - ▶ When you insert the graphic, make sure it is set to 100%.
 - Right Click Image → Size and Position → Scale → Make sure height and width are 100%
 - ▶ Don't shrink graphics on your own—you risk non-compliance on the font size!
- **3. Double check graphics that you're not sure about**
 - ▶ If you're unsure, check the font size using a text box with the same text over your graphic and compare the text size.

Guidelines for Sizing & Positioning

- **1. Follow the rules for getting full-width graphics set to the right size**
 - ▶ Follow previous instructions for font size
 - ▶ For placement, either drag the document, right click → size and position, OR use built in tool
 - Click the graphic → click the “Picture Tools: Format” tab → in the “Arrange” group, click the drop down for “Position”.

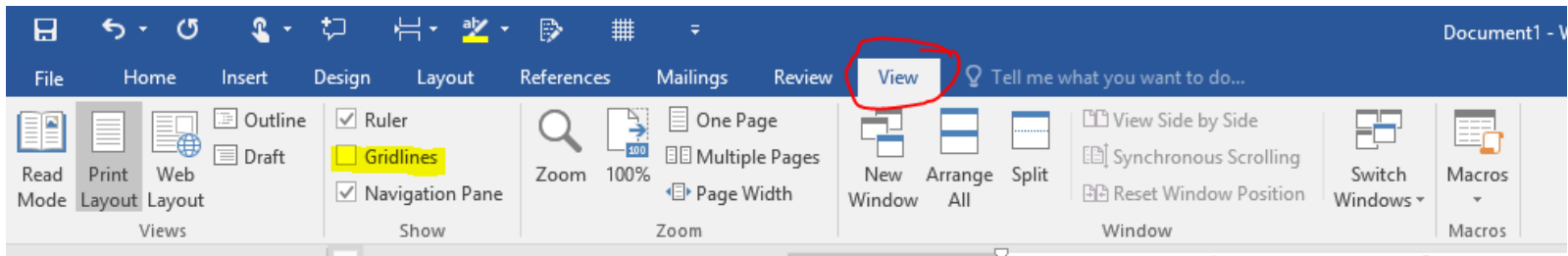


Guidelines for Sizing & Positioning

- **2. Set all full width tables to the right size**
 - ▶ Right click the table → Table Properties → Set Preferred Width and Check Box
 - ▶ 6.5" for 8.5 x 11" paper with 1" margins
 - 9" for a landscape page
 - ▶ 7" for 8.5 x 11" paper with .75" margins
 - ▶ 7.5" for 8.5 x 11" paper with .5" margins

Guidelines for Sizing & Positioning

- 3. Double check using Gridlines in word
 - ▶ Click the View Tab
 - ▶ In the “Show” group, click the box next to “Gridlines”



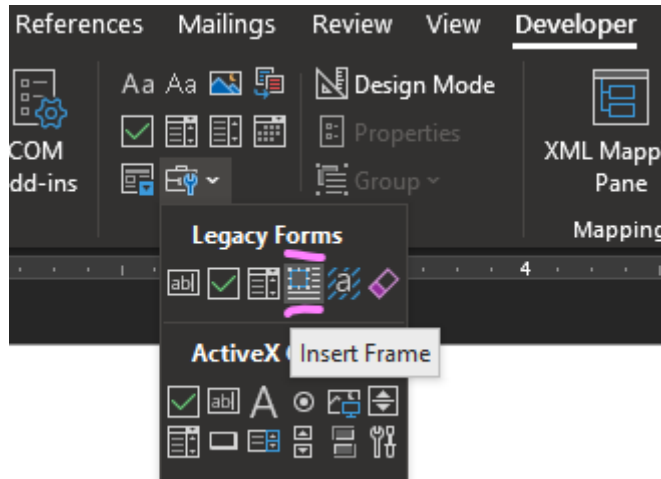
Guidelines for Sizing & Positioning

- **Nudging a Graphic:** To manually place the graphic but use fine adjustment, click the graphic, hold [CTRL], then use your arrow keys to “nudge” the graphic in your desired direction
 - ▶ Useful for making tiny adjustments to improve how the text is wrapping or move it closer to the margin/gridline.
- **Keep Objects Together:** Hold [CTRL] while clicking multiple objects to select more than one object at a time.
 - ▶ Once you have multiple graphics selected, right click one of the graphics → select “group” to group multiple objects within a single frame.
 - ▶ Group is also a command within the “Arrange” group of the “Drawing Tools: Format” and “Picture Tools: Format” tabs

Guidelines for Sizing & Positioning

- **Using Developer Tools to Add Frames**

- ▶ Developer Tools: This Tab is used for creating macros, developing in VBA, and other advanced tasks
 - Not a default tab in Word (follow instructions for customizing the ribbon)
- ▶ To add a frame: Developer Tab → Controls Group → Legacy Tools Command Drop-down → Insert Frame



Guidelines for Sizing & Positioning

- Using Developer Tools to Add Frames

The screenshot shows a Microsoft Word document with the following content:

- A bulleted list item: Donec laoreet nonummy augue
- A heading: **1.2 Heading 2**
- Two paragraphs of Lorem Ipsum text.
- A table caption: **Table XX. Table Title Here**
- A table with 2 columns and 4 rows:

Lorem ipsum dolor sit amet	In porttitor
Lorem ipsum dolor sit amet, consectetur adipiscing elit	Donec laoreet nonummy augue
<ul style="list-style-type: none">In porttitorDonec laoreet nonummy augueIn porttitorDonec laoreet nonummy augue	<ul style="list-style-type: none">In porttitorDonec laoreet nonummy augueIn porttitor
Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.

Below the table is another paragraph of Lorem Ipsum text.

- A heading: **1.2.1 Heading 3**
- A paragraph of Lorem Ipsum text.

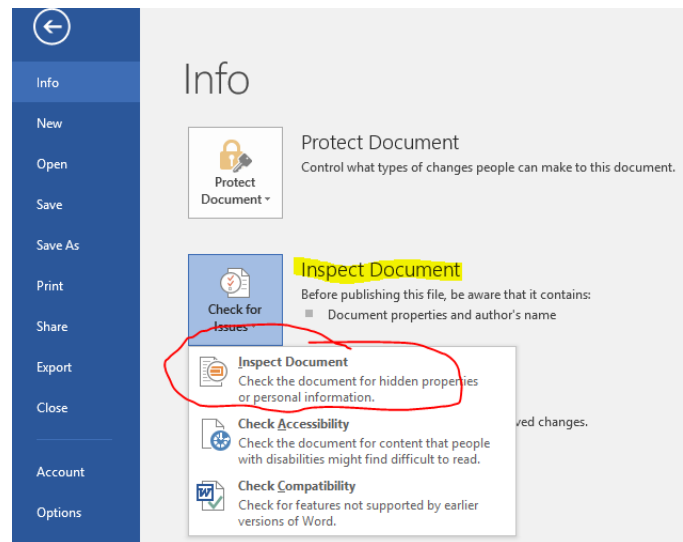
The document footer contains the following information:

September 15, 2020 RFQ No. 50556985 1

Use or disclosure of data contained on this page is subject to the restrictions on the title page of this proposal.

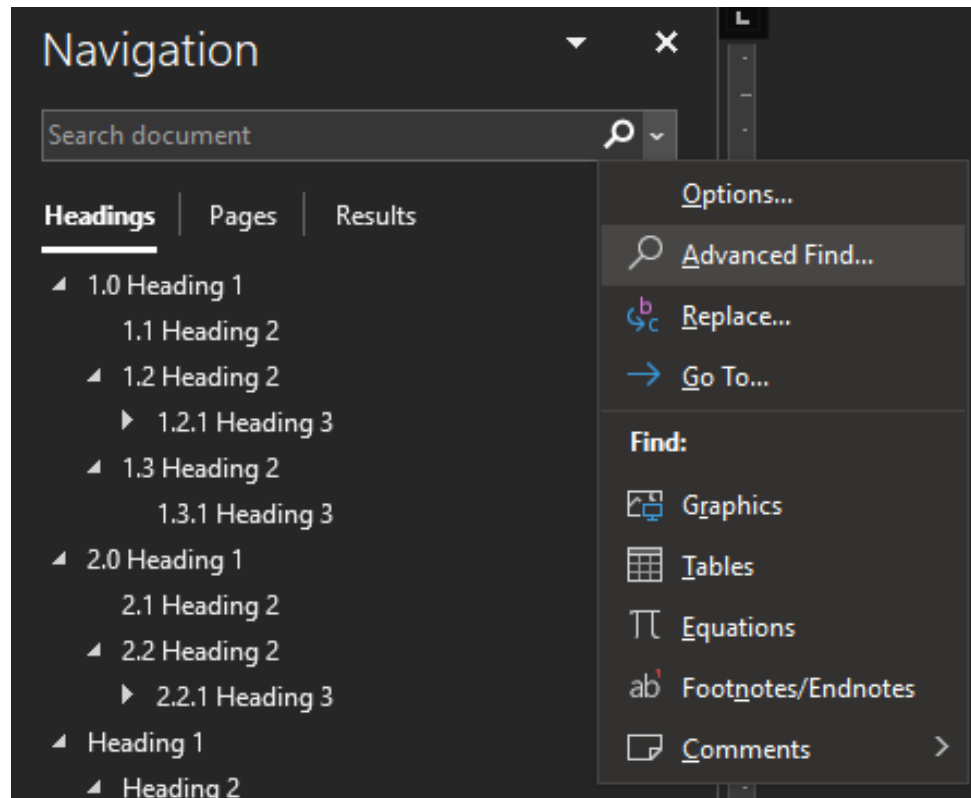
Final Checks before Submission

- Does the Customer Require a Word submittal (instead of hard copy and/or PDF)?
 - ▶ Double check your document in different versions of word
 - ▶ Tracking changes between Word 2010 and Word 2013
- Inspect Your Document before Submitting
 - ▶ Use the “Inspect Document” tool to check for remaining track changes, comments, and author information.
 - ▶ File → Inspect → Check for Issues (drop down) → Inspect Document



Advanced Applications

- **Navigation Pane – Advanced Find**
 - ▶ Advanced Find Options



Advanced Applications

- **Navigation Pane – Advanced Find**

- ▶ Find and Replace

- Global changes when editing documents, wall of truth and one voice
 - Remove extra space after period

The screenshot shows the 'Find and Replace' dialog box with the 'Replace' tab selected. The 'Find what:' and 'Replace with:' fields are empty. Below these fields are buttons for '<< Less', 'Replace', 'Replace All', 'Find Next', and 'Cancel'. The 'Search Options' section includes a 'Search:' dropdown set to 'All' and several checkboxes: 'Match case', 'Find whole words only', 'Use wildcards', 'Sounds like (English)', 'Find all word forms (English)', 'Match prefix', 'Match suffix', 'Ignore punctuation characters', and 'Ignore white-space characters'. The 'Replace' section at the bottom has 'Format', 'Special', and 'No Formatting' options.

Advanced Applications

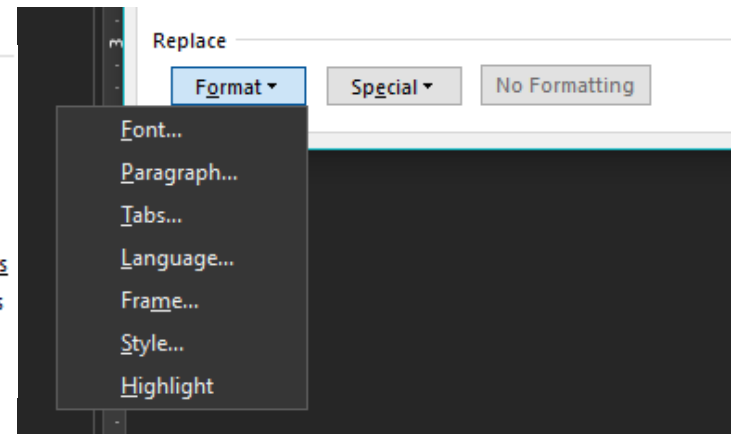
- **Navigation Pane – Advanced Find**
 - ▶ Match Case
 - Useful for finding acronyms
 - ▶ Format
 - Useful for finding highlighted text

Search Options

Search: ▼

- ☐ Match case
- ☐ Find whole words only
- ☐ Use wildcards
- ☐ Sounds like (English)
- ☐ Find all word forms (English)

- ☐ Match prefix
- ☐ Match suffix
- ☐ Ignore punctuation characters
- ☐ Ignore white-space characters

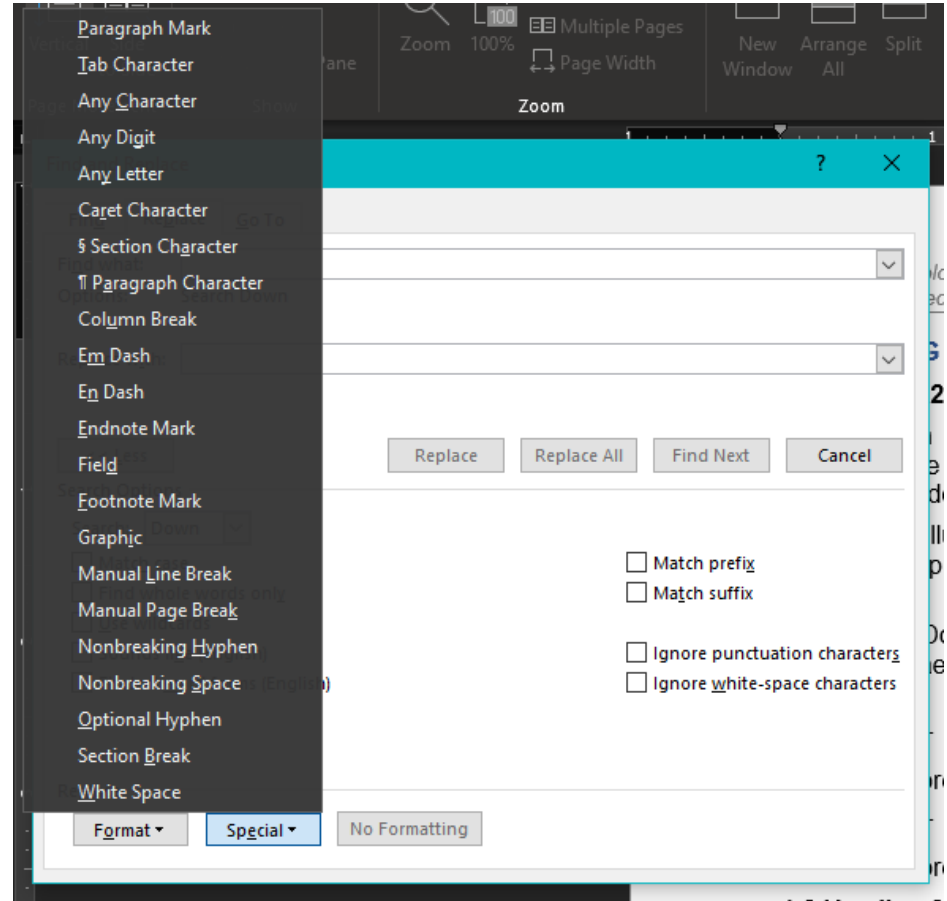


Advanced Applications

- **Navigation Pane – Advanced Find**

► Special Characters

- Use ^p in find and replace to remove paragraph marks from text pulled from a PDF



Advanced Applications

- **Navigation Pane – Advanced Find**

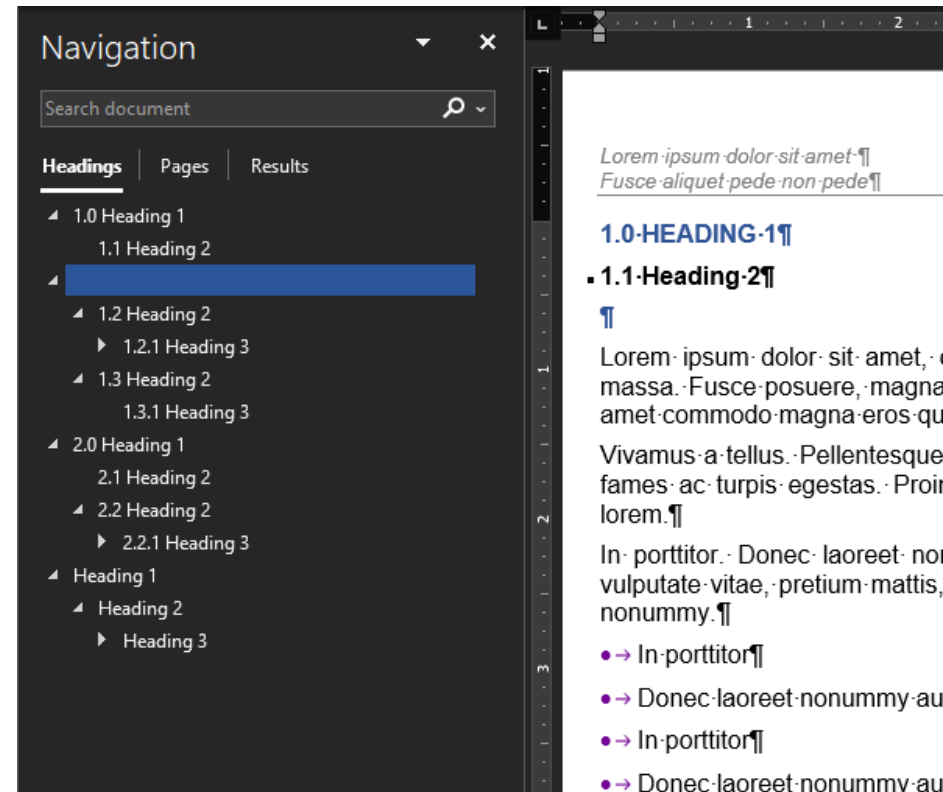
- ▶ Wildcard Searches (based on regex)

Wildcard	Description	Example
?	Any Character	s?t will find sit, sat, and s t (but not seat)
*	0 or more characters	s*t will find sit, seat, and should not
[]	One of the specified characters	s[aie]t will find sat, sit, set, but not seat
[-]	Character in range	s[a-i]t finds sat, set, sit, but not sot or st
<	Beginning of word	<present finds presented, presentation, but not represent
>	End of Word	vent> finds prevent, invent, but not ventilate
[!]	Not	s[!ae] finds sit, sot, but not sat or set
{n} {n,} {n,n}	n occurrences, minimum, min/max	go{2} finds goo, good, but not go [A-Z]{3,} finds any all caps word with 3 or more characters (useful for acronyms)

Advanced Applications

- **Navigation Pane – Additional Examples**

- ▶ Searching for all instances of a company name without “Team” before it (finding “ABC” but *not* “Team ABC”)
- ▶ Use the Navigation Pane to show errors in heading styles
 - Shows blank sections (paragraph markers, spaces) that have picked up a heading style
 - Shows body text that has picked up a heading style



QUESTIONS?



Thank you!



Emily Arnold, CF APMP, ITIL 4

Proposal Specialist

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AOC Key Solutions, Inc. (KSI)

www.aockeysolutions.com

<https://www.linkedin.com/company/aoc-key-solutions/>