The K2 Team's Top Tech Productivity Tips And Tricks

The world of work changed radically and became much more virtual after the pandemic's onset in 2020. Over two years into the "new normal," our team has compiled a list of the top technology productivity tips, tricks, and traps. In this session, you will learn about shortcuts and hacks to help you accomplish more in Excel, Teams, Outlook, virtual meetings, and many other applications you use every day. Attend this session and learn the best tips to help you and your team accomplish more in less time.

Introduction

The two years since the COVID-19 pandemic have caused many people to change how, when, and where they work. Tools like Microsoft Teams and Microsoft Forms, which were both in their early stages of adoption at most organizations at the beginning of the pandemic, are now ubiquitous in many organizations. Since working remotely makes it harder to use paper as part of your workflow, users need to be able to file and search their information digitally with more effective use of search in Microsoft 365. We also need to find ways to do things like compare and store multiple versions of a document in real time so that we can have intelligent discussions about the reasons for changes with managers and subordinates.

Learning Objectives

Upon completing this session, you should be able to:

- Identify steps necessary to construct a Microsoft Teams site
- List examples of essential productivity tips for typical Microsoft 365 applications
- Identify examples of when you can use templates and forms to automate data collection

Microsoft 365 Tips

Customizing the Quick Access Toolbar

The Quick Access Toolbar (QAT) provides you with an easily customizable component of the user interface in Excel 2007 and later versions. You can modify the QAT from within Excel to add buttons for commonly used commands or for macros. In default, the QAT is located above the Ribbon in the Windows title bar, but you can reposition it below the Ribbon, as shown in **Figure 1**.

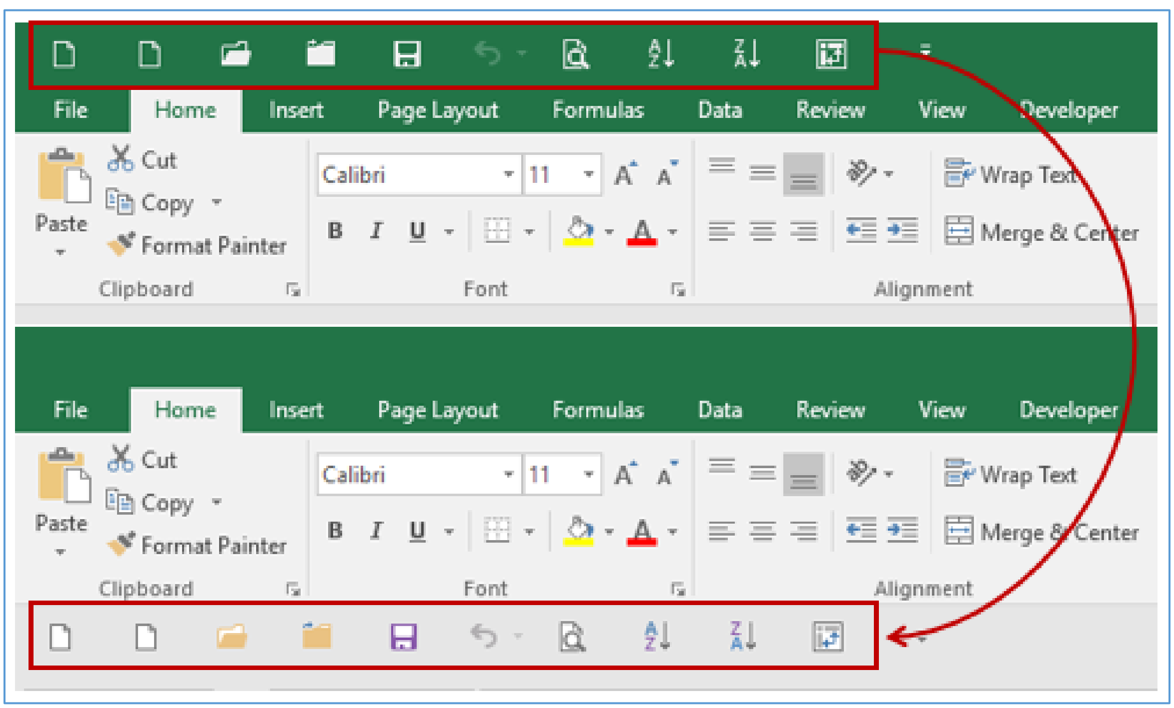

Figure 1 - Positioning Quick Access Toolbar Above or Below the Ribbon

Many users are likely to find that repositioning the toolbar below the Ribbon will deliver better results because it reduces mouse travel to execute commands on the toolbar. You can reposition the toolbar and modify its default commands by clicking the drop-down arrow at the right end of the toolbar to display the **Customize Quick Access Toolbar** menu, as shown in **Figure 2**.

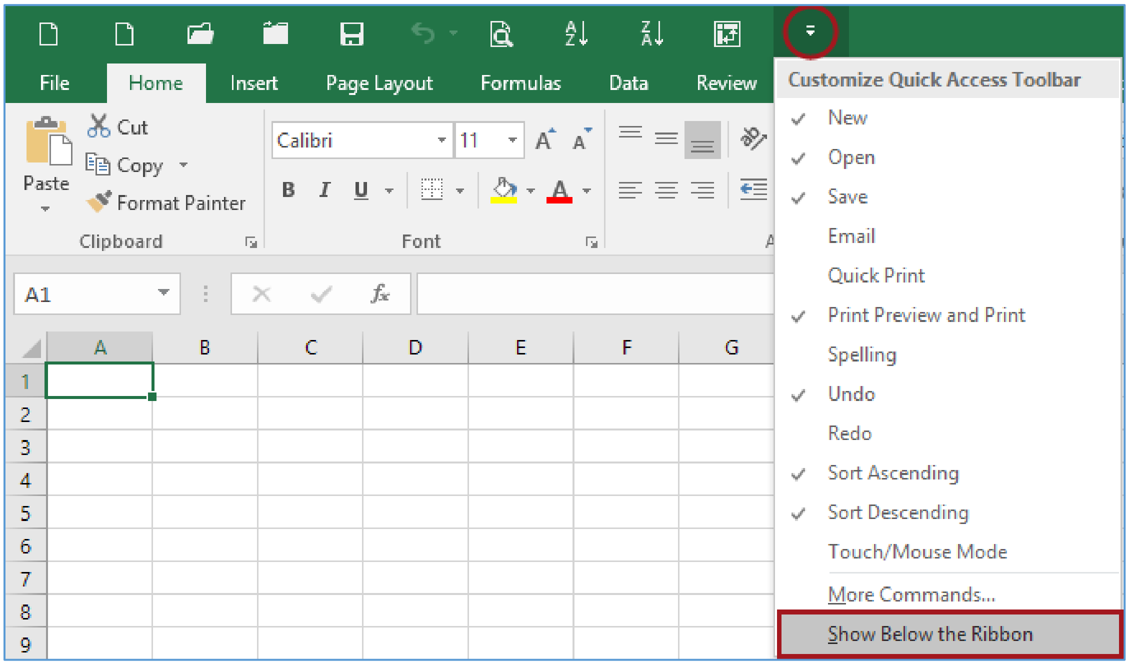

Figure 2 - Customizing Quick Access Toolbar Menu

The default commands appear on the QAT in the order in which you select them from the menu. To rearrange the order, first, unselect all default commands. Then, reselect them in the order that you want them to appear, left to right, on the toolbar.

Perhaps the easiest method for adding a command to the QAT is by right-clicking any command in the Ribbon and choosing **Add to Quick Access Toolbar** from the context-sensitive menu, as shown in **Figure 3**.

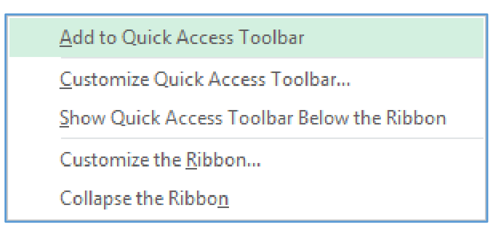

Figure 3 - Adding a Command to the QAT Directly from the Ribbon

To add commands that do not appear in the Ribbon, select **More Commands** from the **Customize Quick Access Toolbar** menu to launch the **Excel Options** dialog box, as shown in **Figure 4**.

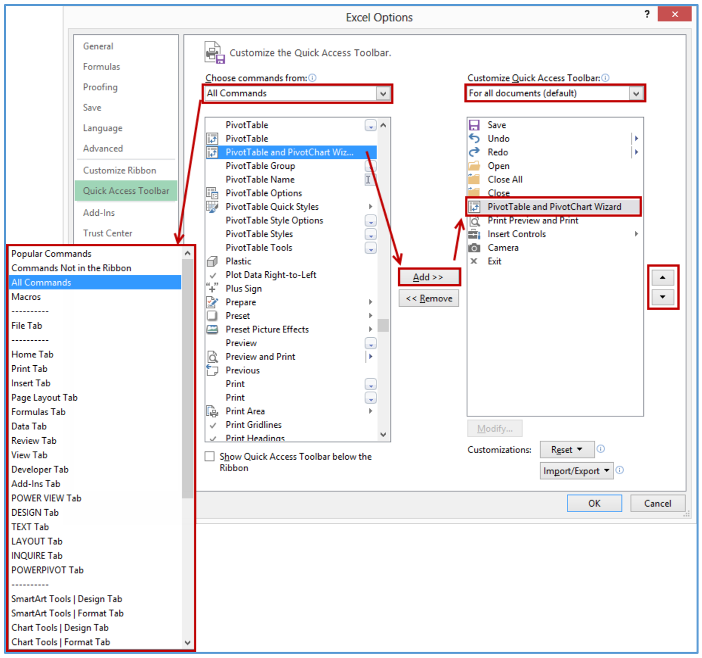

Figure 4 - Adding Commands to the QAT through Excel Options

Note that commands or macros not available in the Ribbon can be added to the Quick Access Toolbar for all documents or for just the active document. This functionality allows you to add macros or special command buttons to a toolbar associated with a single workbook so that the normal toolbar remains uncluttered with little-used functionality.

If more commands are added to the QAT than can be displayed on a single row of the toolbar, a second row is created. However, Excel displays only the first row until you click the **More Controls** icon at the right end of the toolbar. To remove an item from the QAT, right-click on the item and choose **Remove from Quick Access Toolbar**. Items on the **QAT** can be rearranged by selecting the item you would like to move in the list on the right side of the screen and clicking on the **Up/Down** buttons on the right-hand side of the dialog box.

Keyboard Shortcuts and the Quick Access Toolbar

If you would like to use keyboard shortcuts in Office applications, you can press and release one of the **Alt** keys on your keyboard, which will reveal the keyboard shortcuts associated with each tab of the Ribbon, as shown in Figure 5 below – (e.g., **H** for **Home, N** for **Insert**). The most powerful part of this feature, however, is easily overlooked. Each of the locally installed Microsoft 365 applications (Word, Excel, PowerPoint, Access, Outlook, etc.) support keyboard shortcuts to access both menus and items on the Quick Access Toolbar – and each entry in the **QAT** is assigned a unique keyboard shortcut – the first one is assigned **1**, the second is assigned **2**, etc., giving you access to all of the menus as well as the items on the QAT without the need to use your mouse.

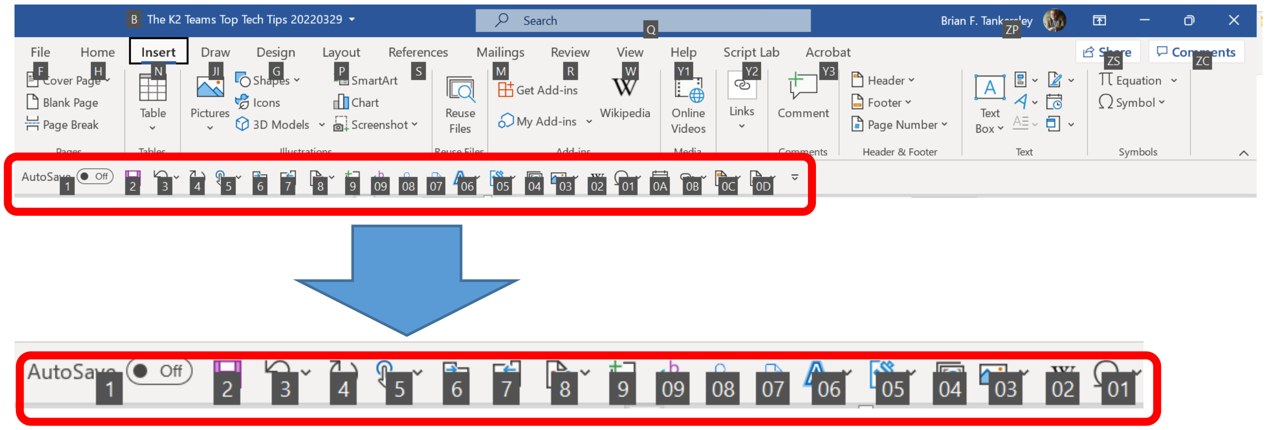

Figure 5 - The Keyboard Shortcuts For The QAT's First Eighteen Entries

Search in Outlook, OneDrive, and the Office Portal Page

- [Microsoft Search Overview | Microsoft Docs]()

Comparing Files in Excel and Word

To compare files in **Excel,** you will need to use the **Inquire** add-in which comes with Microsoft 365 Business Premium, Office 365 E3/E5, Office 365 ProPlus, or Microsoft 365 Enterprise. Inquire's **Compare Files** feature provides a feature that has long been sought by many users. With Compare Files, you can electronically compare two workbooks and instantly identify all differences between the compared workbooks. To use Compare Files, begin by opening the two workbooks you want to compare. Then, choose **Compare Files** from the Inquire tab of the Ribbon and select the two workbooks you want to compare, as shown in **Figure 6**.

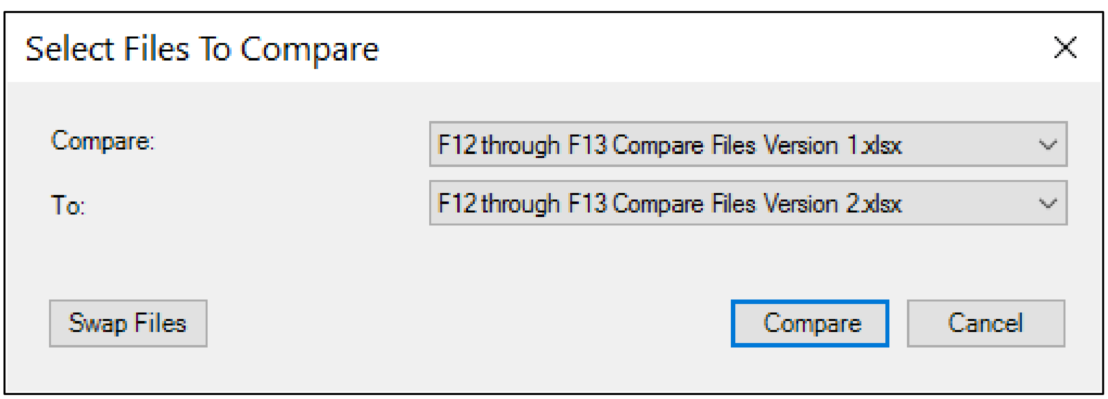

Figure 6 - Selecting Excel Workbooks to Compare

Upon clicking **Compare** in the lower-right corner of the **Select Files To Compare** dialog box, Excel analyzes the two workbooks and generates a detailed analysis that highlights differences in data, formulas, formatting, and other characteristics. **Figure 7** presents a sample of that analysis.

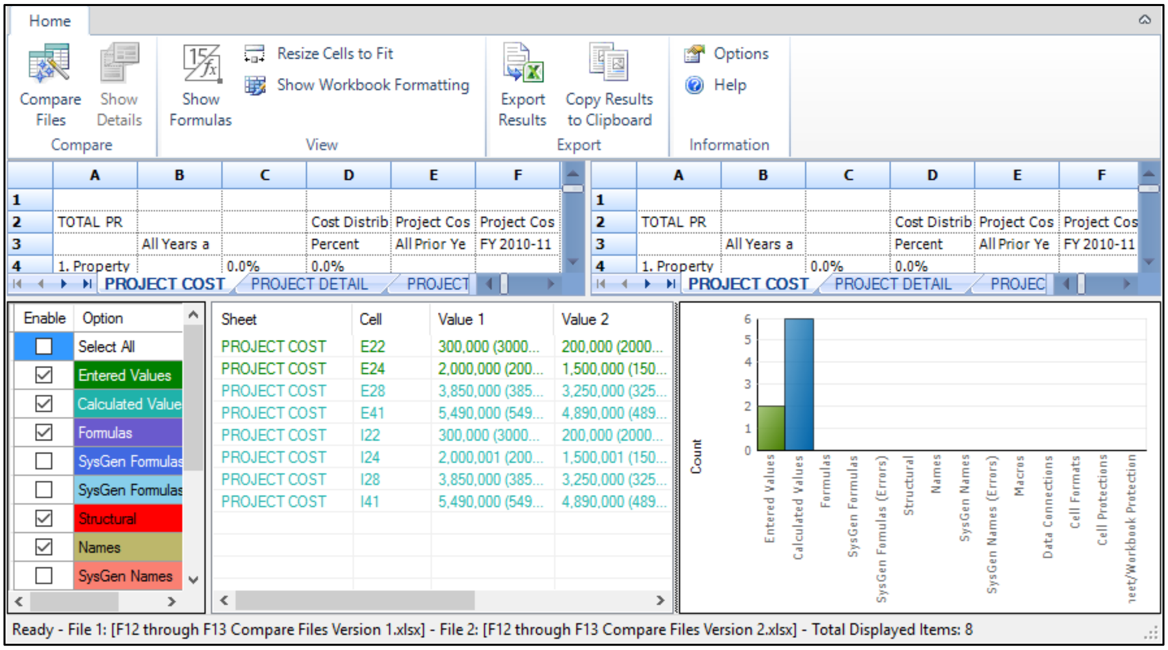

Figure 7 - Sample Output from Excel's Compare Files Feature

To compare files in **Word**, users must click on the **Review** ribbon tab, then **Compare**, as shown in **Figure 8** below.

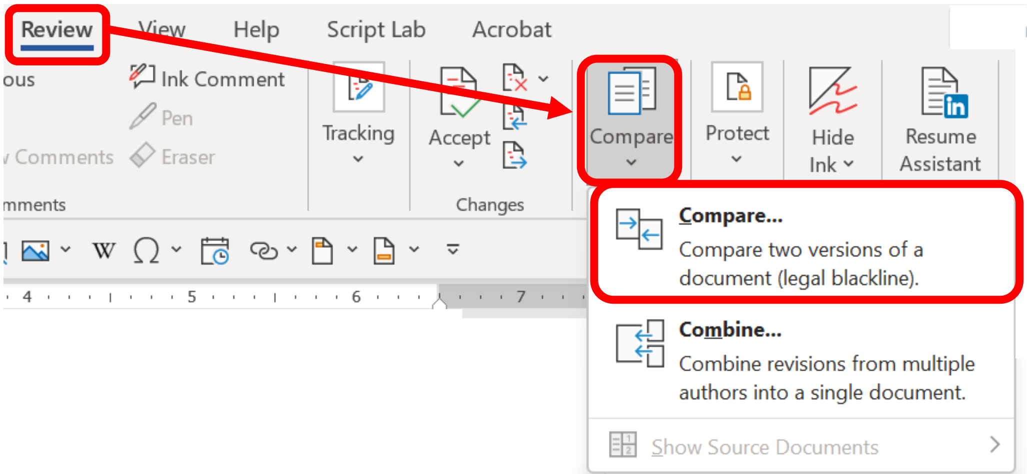

Figure 8 - The Compare Feature in Word Appears on the Review Ribbon Tab

Once this option is selected, Word will allow users to select which file is the **Original Document**, which file is the **Revised Document**, and also allows users to specify how the changes between the two versions will be labeled, as shown in **Figure 9**.

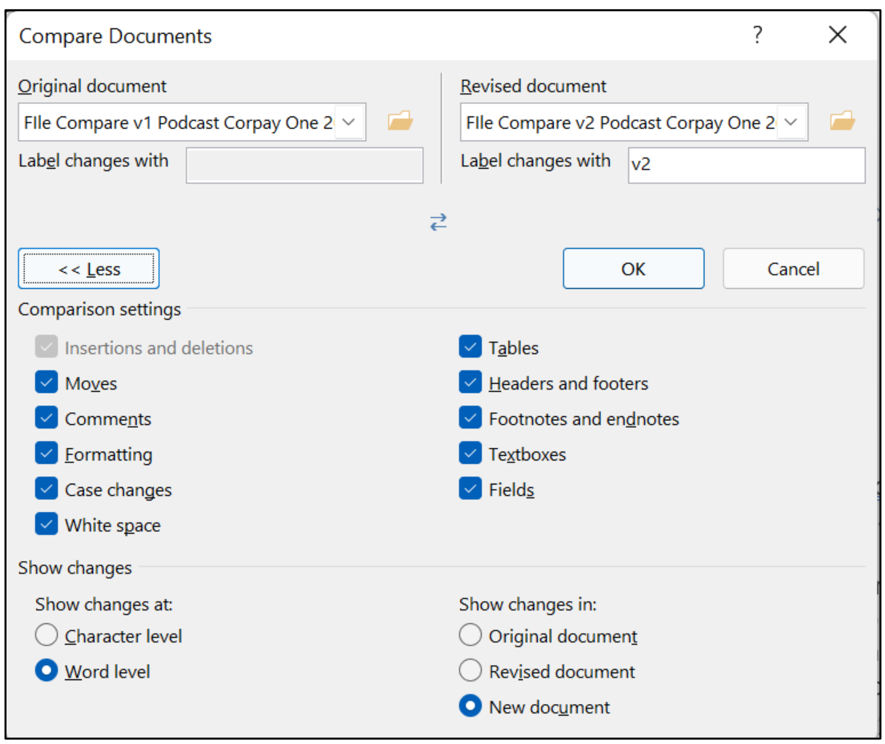

Figure 9 - The Compare Documents Dialog Box in Word

Once users click on **OK**, they can review the changes in detail by scrolling through the **Compare Result** window shown in **Figure 10**.

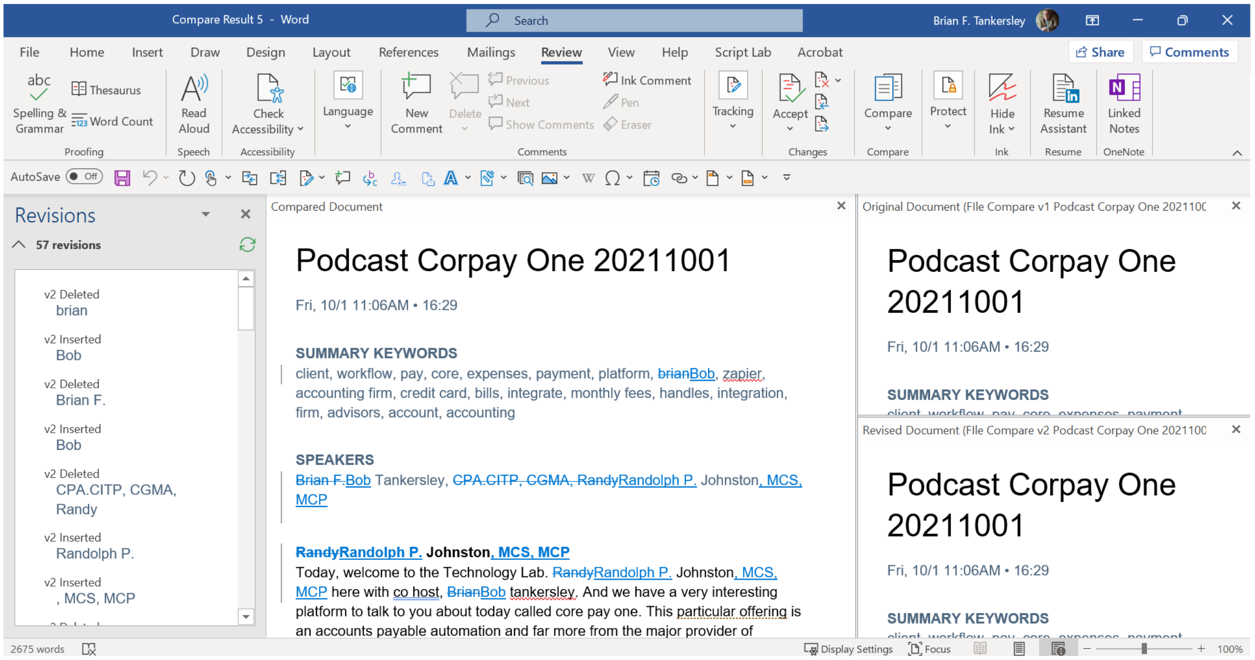

Figure 10 – Compare Documents Allows Users to See Changes Between Two Versions of a File

Co-authoring in Microsoft 365

Users can collaborate on Word, PowerPoint, and Excel files which are stored in personal OneDrive, OneDrive for business/school, SharePoint, and SharePoint Server. To co-author, you need

- **A shared storage area** - OneDrive, OneDrive for work or school, SharePoint, and SharePoint Server are shared storage areas that enable co-authoring.
- **Apps that support co-authoring** - Word and PowerPoint on all devices and versions more recent than Office 2010 support co-authoring. The Excel mobile apps and the latest version of Excel for Microsoft 365 also support co-authoring.
- **A co-authoring friendly document** - Co-authoring is only supported on modern file formats including: .docx (Word), .pptx (PowerPoint), and .xlsx (Excel).
- **Edit permissions for co-authors** - All co-authors must have permission to access and edit the documents.

Users can use the Web version of the Office 365 apps in their browser, or files can be co-authored in the Office applications on your Windows computer, your Mac, or your mobile device.

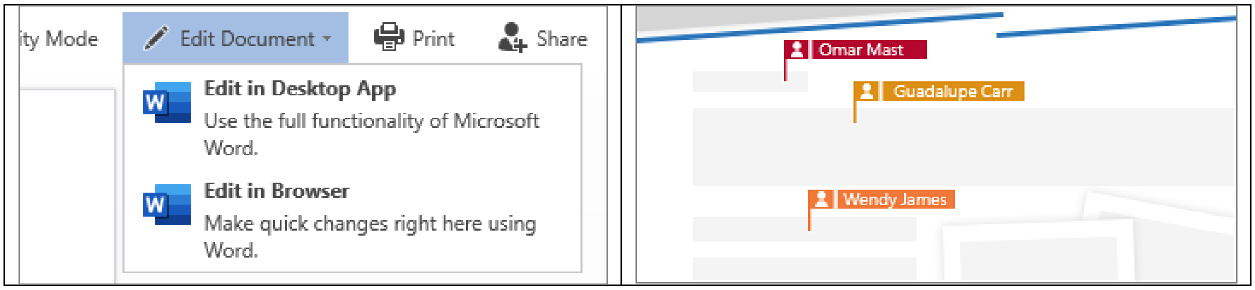

Figure 11 - Users Can Choose to Coauthor Office 365 Files in a Browser or in the Native Applications

Specifics on how authoring is accomplished in each of the following Office applications are available at the links below:

- [Word]
- [Excel]
- [PowerPoint]

Users can also co-author files when they are opened in the **Files** tab of a **Channel** within a **Team**.

Microsoft 365 Forms

Microsoft 365 Forms (forms.office.com) is a relatively new web-based form tool for **Microsoft 365** and is included with most Microsoft 365/Office 365 plans, including plans for Home, Business, Enterprises, and Education**.** Forms is designed to provide end-users with interactive links that can be used to gather information from customers and employees alike. The data from Forms exports cleanly to **Excel** and can create **Labels** such as name tags from the **Mailings** tab in **Word**.

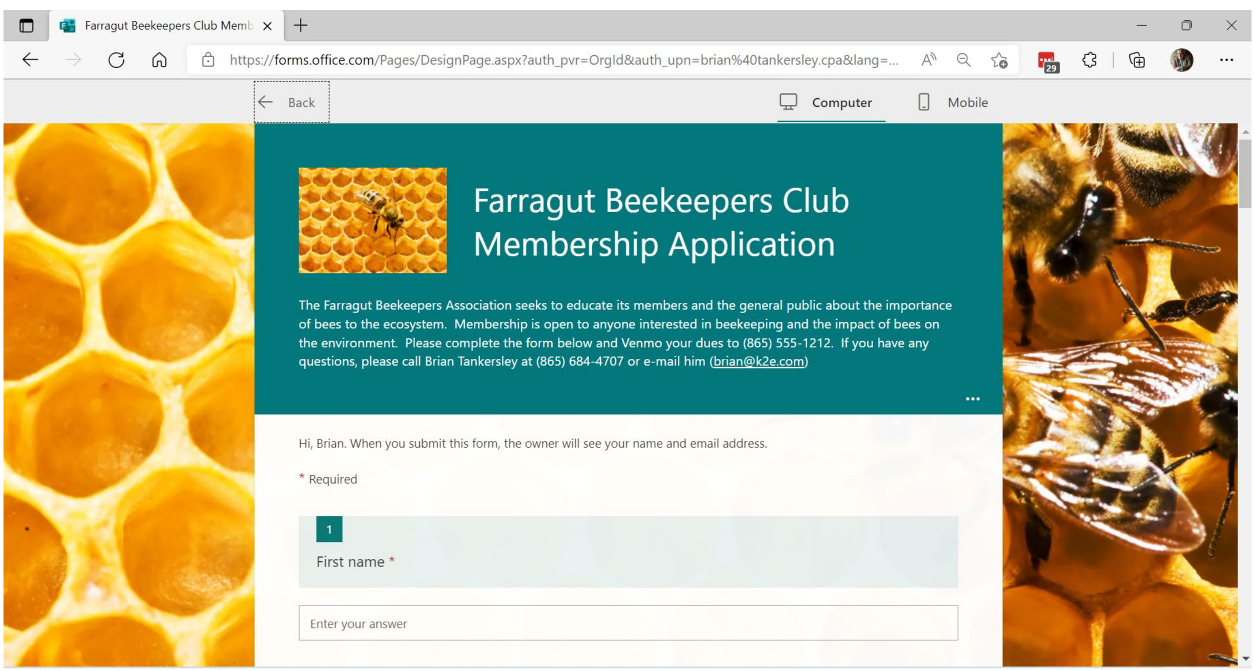

Figure 12 - Microsoft Forms Simplifies the Process of Collecting Data With Web Forms

Users can create their own custom forms using themes created by Microsoft or themes of their own design and can create forms with sections, multiple-choice questions, ratings, rankings, and can filter fields for text, date, or numeric input, as shown in **Figure 13**. The process of creating a new Form is relatively simple and can be completed even by novice users with no formal training on the application.

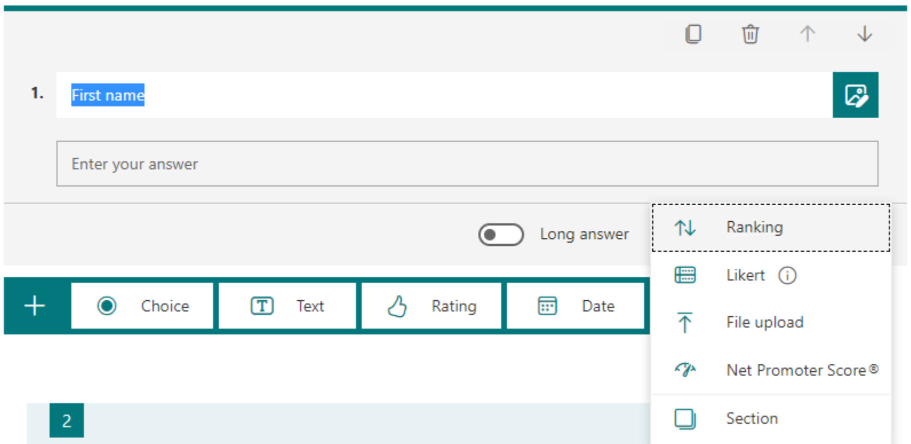

Figure 13 - Users Can Insert Many Different Types of Fields Into Microsoft Forms

Users who require more sophisticated features like branching logic or integrations with other applications may need more sophisticated tools like **SurveyMonkey** or **Microsoft Power Automate**.

Approvals in Microsoft Teams

One interesting application of Forms is an integration with Microsoft Teams called **Approvals**. Approvals creates a tracking form associated with an event or a transaction which is created, evaluated, and monitored from within a Team. Users can create new approval forms using any of the 24 prebuilt templates in categories like activities, administration, attendance, finance, and order management, or they can choose to create their own forms using the Microsoft Forms toolset.

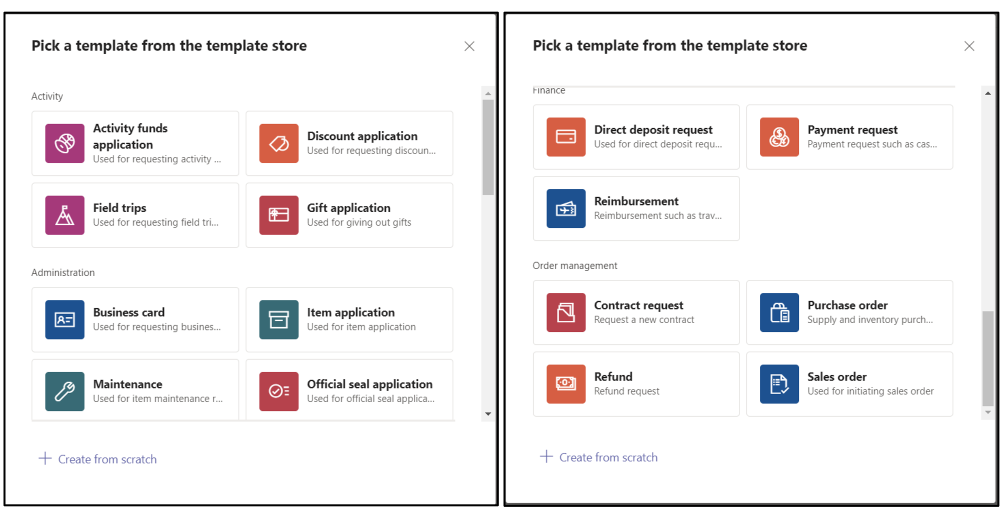

Figure 14 – Some of the 24 Available Form Templates in Approvals for Teams

Users can initiate forms from within Teams, and completed forms can be routed to one or more approvers who can be pre-configured, or approvers can be selected at the time the form is completed. File attachments are permitted in these forms, and Approvers can add comments before either approving or rejecting a request (as shown in **Figure 15** below)

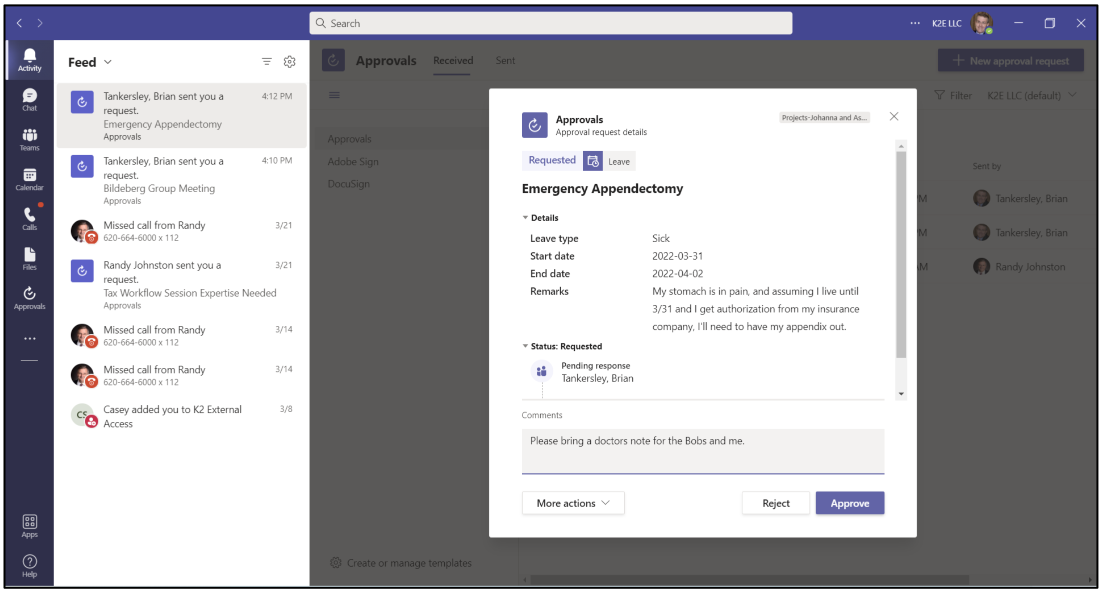

Figure 15 - The Approver Interface in Approvals for Teams

User requests are logged and tracked in Teams in the **Approvals Hub** (shown in **Figure 16**), which consolidates the approvals which have been sent or received by the user's account in Power Automate, Teams, SharePoint, and Dynamics 365 in one place. While the capabilities of Approvals in Teams tool are not as rich as the more sophisticated options in **Power Automate** or those in a dedicated expense reporting tool like **Zoho Expense**, **Tallie**, or **Concur**, the tool should scale well for small businesses and compact workgroups within larger organizations.

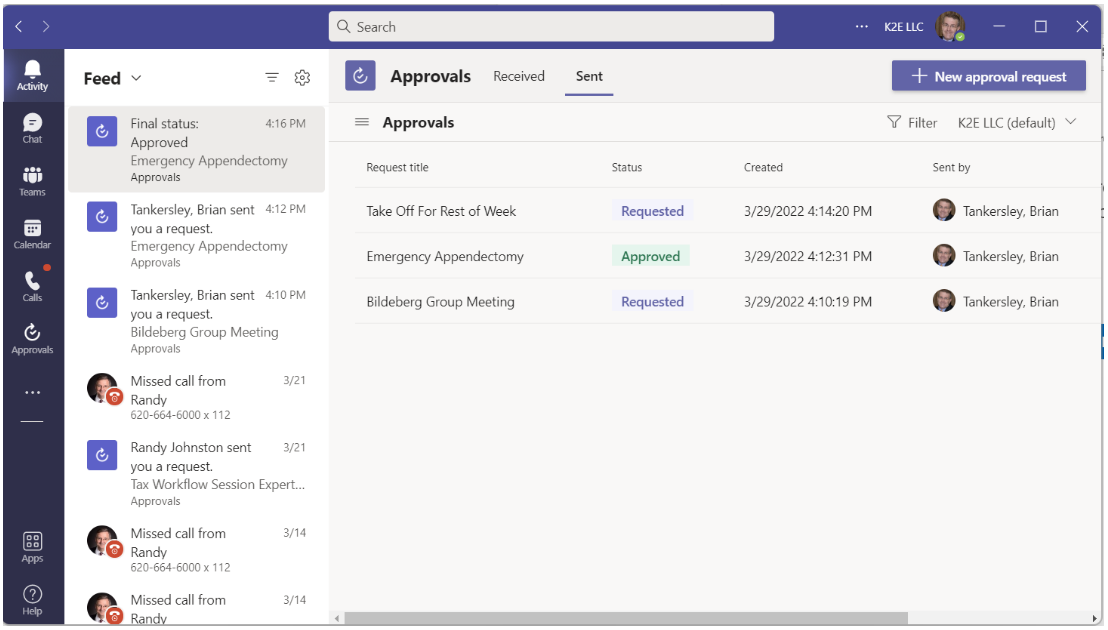

Figure 16 - The Approvals Hub in Microsoft Teams

Collaborating Effectively With Microsoft Teams

The unprecedented quarantines of the COVID-19 pandemic have made fundamental changes in how, where, and when employees do their work. One tool which has revolutionized how many organizations operate is Microsoft Teams. Teams provides telephony, video calls, chat, document sharing, approvals, and integrations with hundreds of different solutions. Unfortunately, poorly designed **Teams** and **Channels** can create data sprawl on an unprecedented scale in Microsoft 365 deployments. While Microsoft makes it easy to create teams, its integrations with Outlook Groups and SharePoint can create a wide range of issues in your organization. As the K2 team learned in 2021, a simple act such as renaming a channel in a team can break the integrations between Teams and SharePoint such that files which were once available are no longer visible. Accordingly, we recommend that you have a steering committee provide input to your IT group on how you would like to use Microsoft Teams so that the proper structure and naming conventions can be created. While it is possible to change the Teams configuration after the initial implementation, these problems are challenging to identify and repair, so we recommend that you implement this powerful tool right the first time.

Automating Meeting Setup in Outlook With Calendly and Bookings

One of the most powerful productivity enhancers for many executives is the ability to automatically schedule meetings with others without having to speak with an executive assistant who coordinates times, sets up the Zoom/Teams video calls, and shares that information with all of the participants. This unpleasant task can be automated for many routine meetings using automated scheduling solutions like **Calendly** (shown in **Figure 17**) and **Microsoft Bookings** (shown in **Figure 18** and **Figure 19**).

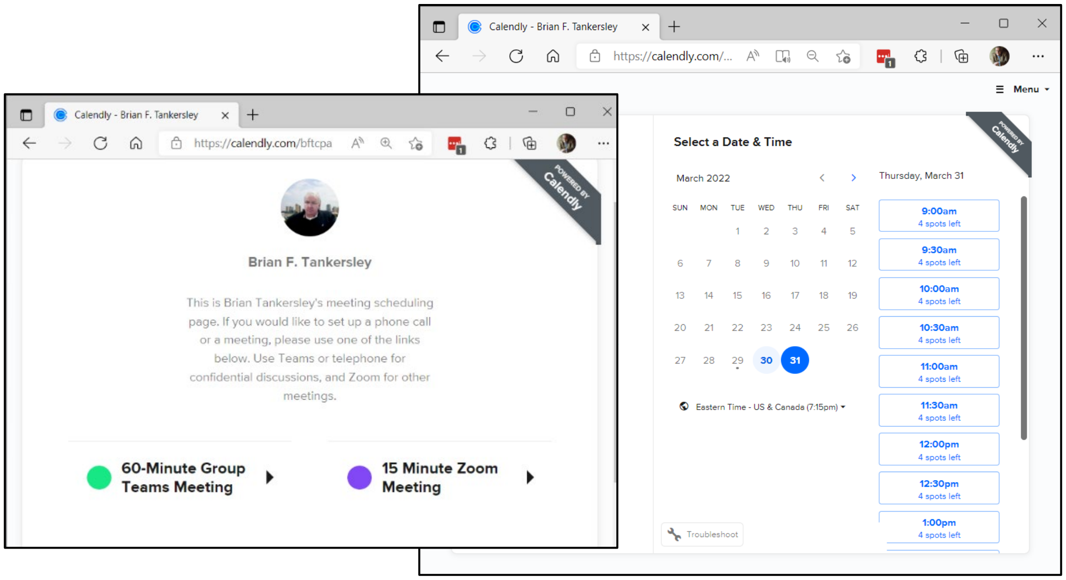

Figure 17 - Scheduling a Meeting in Calendly with Automated Availability Checking

Calendly integrates with Microsoft 365, Google Calendar, Outlook, Apple iCal, as well as most major meeting platforms, including Zoom, Teams, and GotoMeeting. Users can specify many different kinds of meetings with different lengths and goals, can check up to six different calendars for conflicts, set limits on the hours when those meetings are accepted, and once accepted, Calendly will automatically record the meeting in the user's calendar and sent a completed invitation with all meeting details to required attendees.

Calendly is a powerful tool that many on the K2 team now find essential for managing appointments and meetings. To learn more about Calendly, visit their website at http://www.calendly.com.

Office 365 Bookings

Microsoft provides a tool called **Office 365 Bookings** with Microsoft 365/Office 365 for businesses and enterprises to facilitate self-service appointments made by your clients and associates. Bookings integrates with Office 365 Exchange and is included with Office 365 Business Premium and Office 365 Enterprise E3/E5 subscriptions. The service allows users to create services for clients to purchase, set hours available, link to staff calendars in Office 365 Exchange, and create and publish a customized portal that can be shared with others, as is shown in **Figure 18**. A mobile app is available for both iOS and Android devices, which allows staff to easily record service requests received by e-mail or phone call.

Data can be exported in an Excel format for the next 120 days so that users can review their future appointments and import them into other applications.

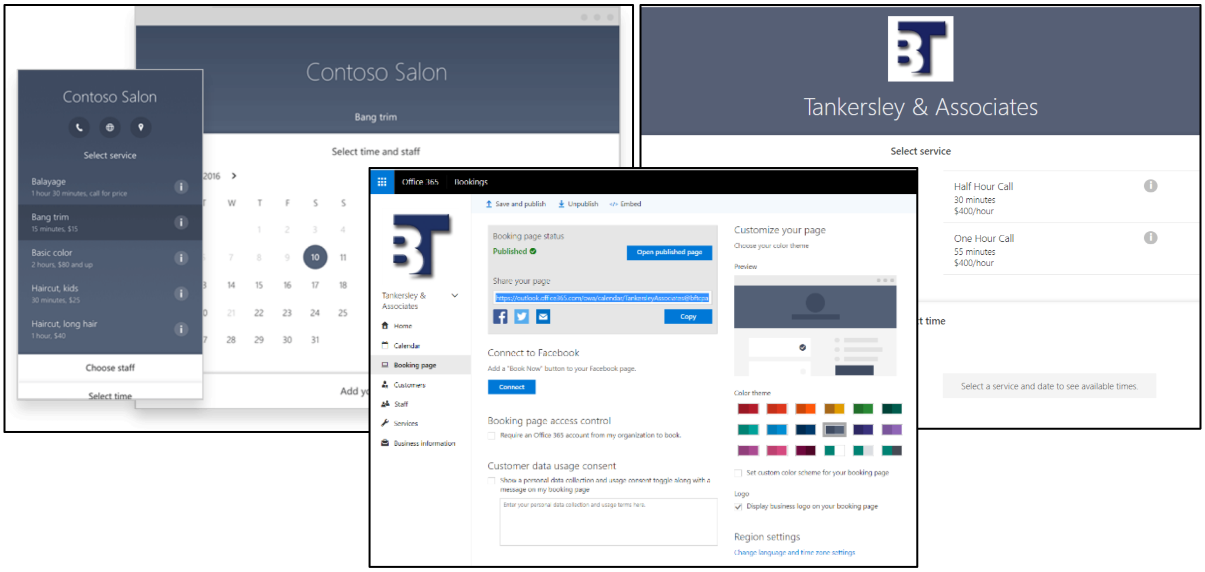

Figure 18- Microsoft Bookings Creates Custom Pages for Use by Your Customers

Any appointments scheduled are confirmed via e-mail for both the client and staff person, and the application can be used to cancel, reschedule, or add new appointments with little effort, as shown in **Figure 19**.

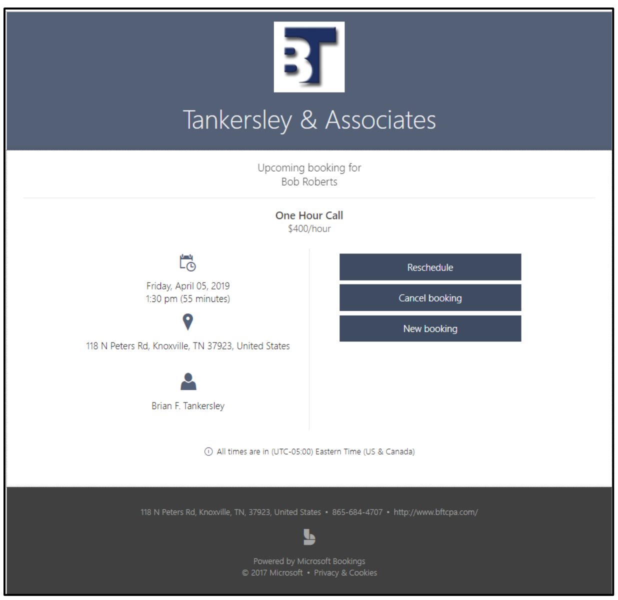

Figure 19 - A Client Landing Page in Microsoft Bookings

Teams and Multiple Account Domains

Although we are impressed with Microsoft Teams, there are many difficult problems that arise when you use Teams in multiple organizations. For example, K2 instructor Brian Tankersley is a member of Teams for his work with K2 Enterprise (k2e.com), his volunteer work with AICPA, and his own organization. Although Outlook will handle all of these calendars seamlessly, Teams often doesn't work as expected unless you are fastidious about how you manage your local Teams login and select the proper Microsoft 365 tenant every time when joining a meeting or otherwise collaborating with others.

In our experience, for Teams calling to work properly, many settings must be configured properly in Teams and Outlook, including:

- The user associated with the Edge browser must have the same e-mail address as the person who was invited to the meeting.
- The correct username must be logged in to Teams, and the proper Teams instance (e.g., AICPA/K2/Adept) must be selected from the drop-down menu in Teams.
- The calendar on which the appointment is stored must be the same as the user who is invited to the meeting

Despite our best attempts, we find that if we do not make sure that we are logged into the proper Microsoft account, the correct Teams instance is selected, and the browser logged in as the proper user is active at the time the meeting is joined, we are often informed that we are locked out of the meeting until we are admitted by the proper user with the proper credentials. While we expect Microsoft to continue to make improvements to these features so fastidious attention to these steps are not required before joining Teams meetings. At the time this session is being written, the controls and tools for managing these problems are clunky and unwieldy in some cases for even the most advanced users.

Productivity In Other Areas

Using Zoho Social to Manage Your Social Media

Social media has become a significant marketing channel for most businesses, and the sheer number of platforms and the frequency with which we post to these platforms make it helpful to have a tool to manage your social media interactions. As these interactions become more important to your sales efforts, you may find that you need a tool to help you schedule all your posts, track the response rates, and funnel the leads and social media interactions into your marketing campaigns and your CRM from one simple tool.

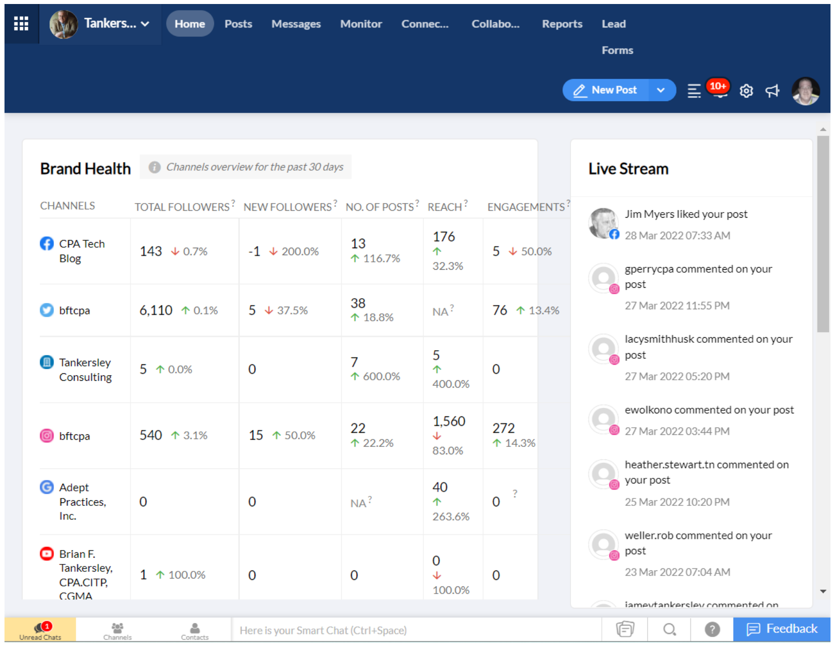

Figure 20 - Zoho Social Helps Marketers and Entrepreneurs Manage Their Posts Across Multiple Services

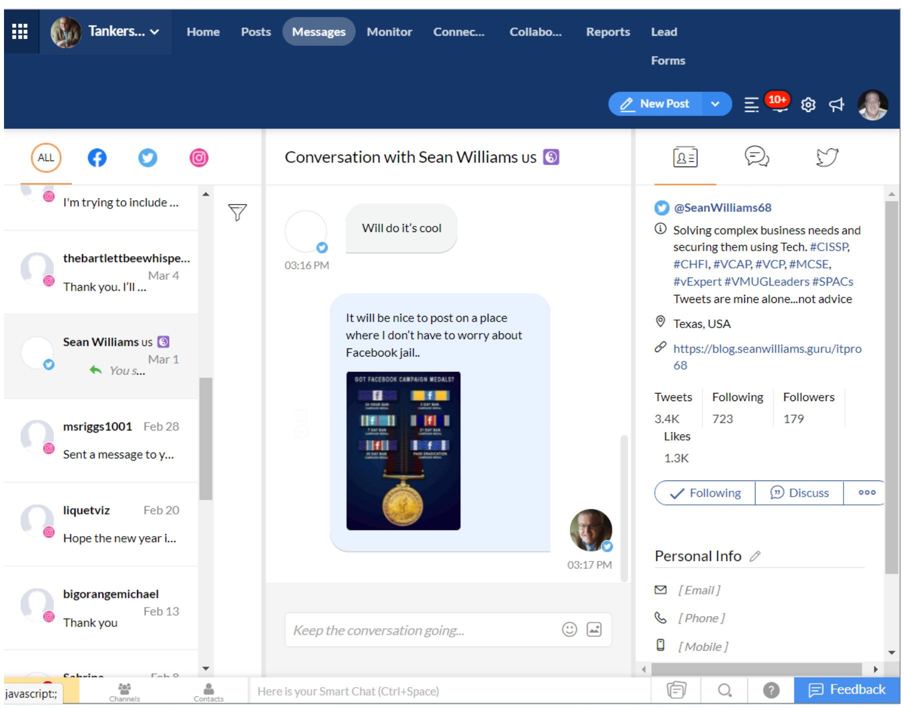

Figure 21 - Zoho Social Handles Most Direct Messages In One Unified Interface

Zoho Social will manage activity on Facebook, Twitter, LinkedIn, Instagram, Google, and YouTube. The application can be used from the mobile app or any web browser and is available as a standalone solution or as part of the larger Zoho One bundle. For more information and pricing details, visit zoho.com/cpa.

OCR Data Extraction and Data Entry for Payables and Expense Reports

Data entry has been the bane of bookkeeping since inception, and innovative accounting professionals are banishing the tales of keying invoice data to tales overheard in the break room. While nothing will rescue you from the exaggerated horror stories of your bosses and coworkers, you can truly end most of your data entry using next generation optical character recognition (OCR) tools which are built into expense reporting tools like **Zoho Expense** and **SAP Concur** and are also in payables processing tools like **Corpay One** and **Bill.com**. While there are many other standalone OCR data extraction services that can extract information from statements, invoices, and other business documents (including **Dext/Receipt Bank**, **PlateIQ**, **Sage AutoEntry**, **Vic.ai**, and many others), we will focus our efforts on the point solutions mentioned above which include OCR capabilities as one part of their more comprehensive service offerings.

Expense Reporting

Expense reporting is one of the easiest areas to automate in any business. There are dozens of well thought out, highly capable solutions available to help automate the tedious process of assembling, totaling, approving, and reimbursing employees for out-of-pocket expenses. Over the last 15 years, K2 Enterprises has used three expense reporting solutions: **SAP Concur**, **Tallie by Emburse**, and our current solution, **Zoho Expense**. While a detailed discussion of the merits and challenges of using each of these tools in our environment is beyond the scope of this session, the key areas for automation include:

- Automatic or simplified import of receipts
- Bank feed support for personal and corporate credit cards
- Data extraction and receipt matching
- Built-in accuracy and duplication checking
- Customizable approval workflow and status tracking

A significant advantage of these tools is the ability to "scan as you go," capturing receipts and other information on a contemporaneous basis while the trip is in process. Zoho Expense's mobile application allows users to capture receipts using the phone's camera, by e-mail forwarding, or by manual upload. The amounts can be extracted from the receipts using OCR, matched to amounts from credit card bank feeds or manually entered. The "autoscan" OCR feature is remarkably accurate and uses OCR with human validation to retrieve the date, vendor, and amount from the image of the receipt.

Users can assign multiple optional fields to each expense. K2 captures the general ledger account and job number associated with the expense, as well as the state where the expense was incurred. The solution includes tools to split expenses which should be assigned to more than one job or expense code. Expense requires a receipt for all expenses above a threshold amount ($50 for our organization)

Duplicate expenses, amounts/dates that match previously reported expenses, and missing receipts are flagged and the user and reviewer must confirm that these amounts are not duplicates.

The approval workflow is configurable and gives organizations a great deal of flexibility in how they choose to approve employee expense reports. Employees can be reimbursed online using ACH payments, added to paychecks, or paid using a manual check.

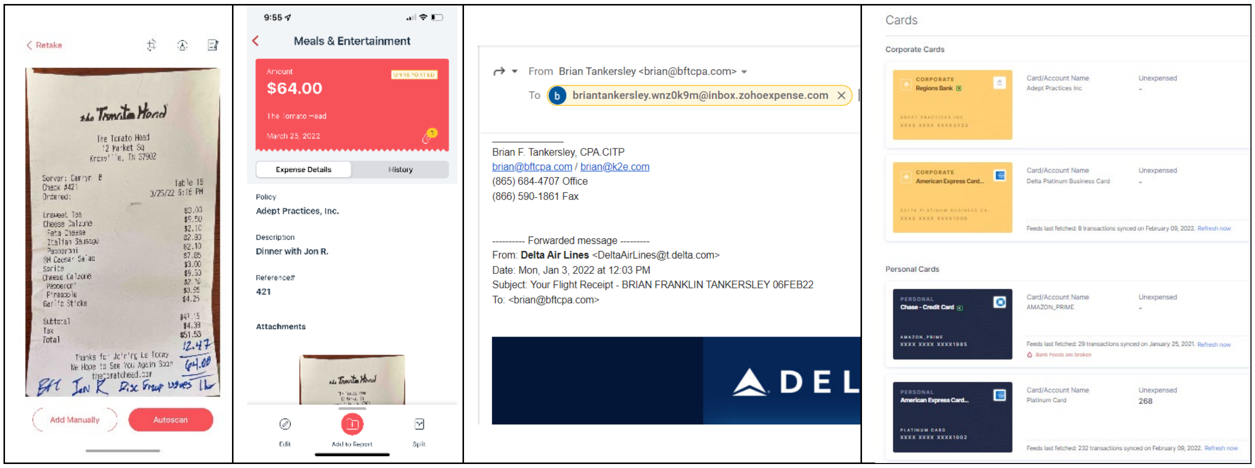

Figure 22 – Input Options Include (From L-R): Mobile Receipt Capture, Data Extraction, E-mail, and Bank Feeds

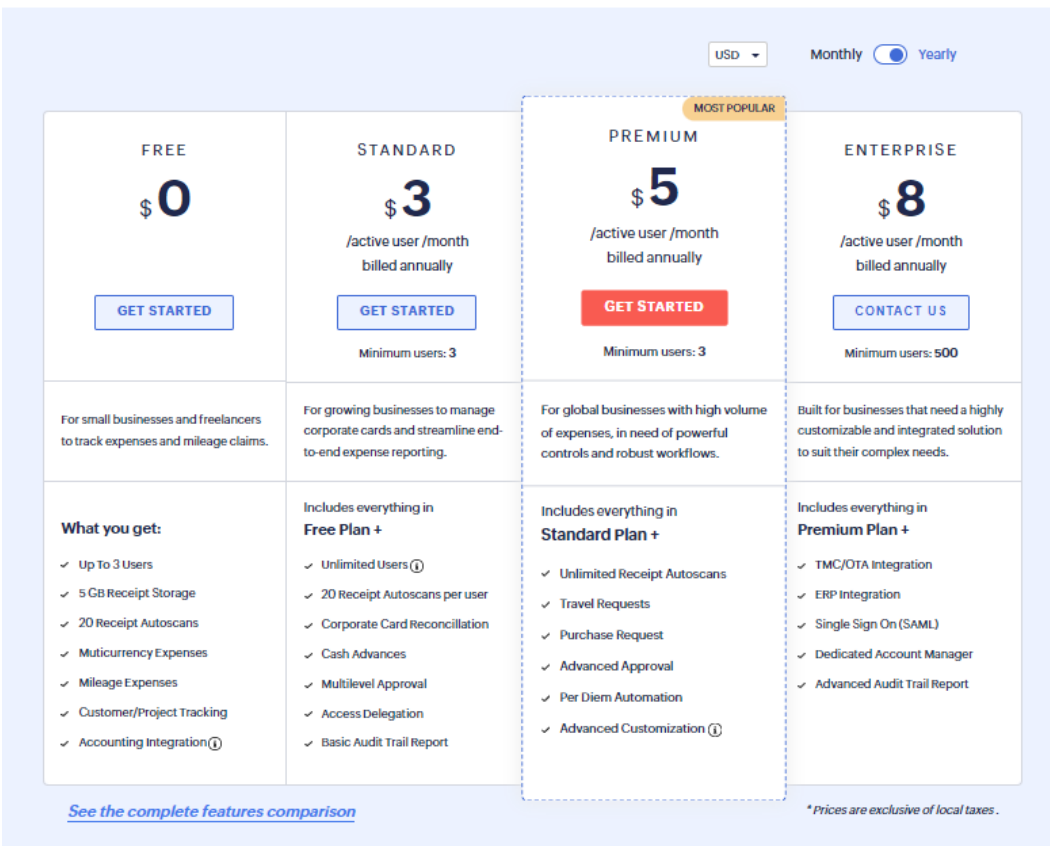

Figure 23 - Zoho Expense Is Available In Four Different Tiers

Payables Processing

While expense reporting is similar from organization to organization, payables processing tends to be more complex in larger organizations than in smaller organizations and has many different requirements based on the company's industry. Restaurants may need line item detail for food supplier invoices so they can accurately manage their inventory, while service-based businesses may just need totals off of each invoice. Some payments, like rent, may need to be made monthly without an invoice or an explicit monthly approval, while others, like utility bills, may need to be scanned and approved by an employee. There are literally dozens of payables processing services that one can use, but we will focus on one tool which is used across companies of all sizes – [Corpay One](), a subsidiary of FleetCor.

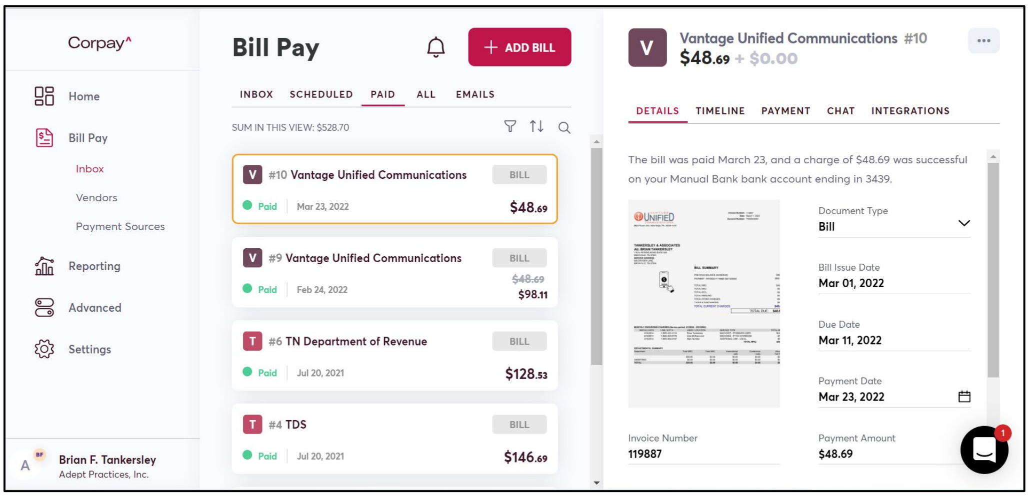

Figure 24 – Corpay One's Bill Pay Screen Summaries Payment Activities

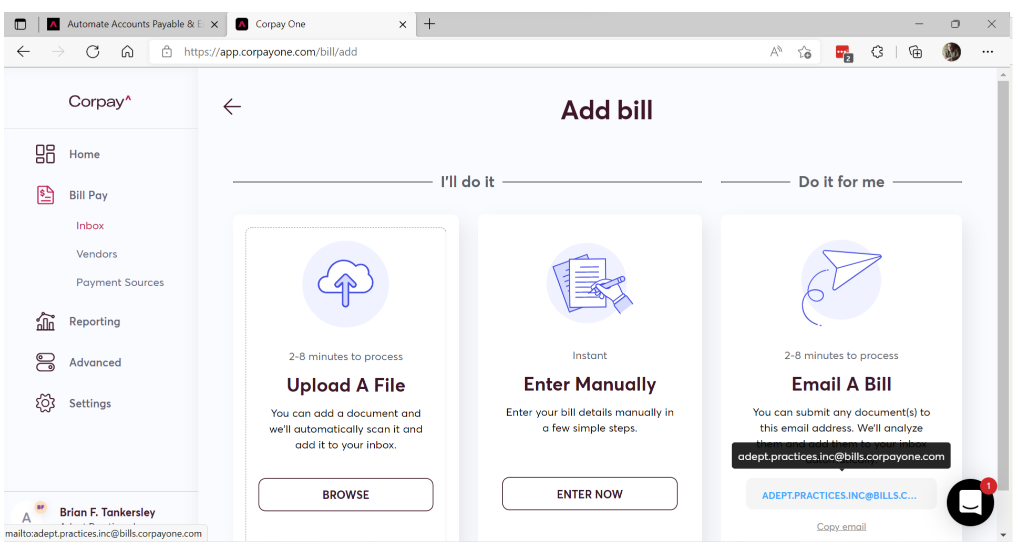

Figure 25 - Invoice Import Options In Corpay One

Corpay gives organizations a free payables workflow tool with integrated programmable workflow management. Bills can be entered by e-mailing them to a custom e-mail address or scanning/uploading them to the Corpay portal. Once uploaded, the vendor, amount, date, and invoice number will be extracted from the invoice image. The bill will be classified to the same account which was used for previous payments to the vendor, will be scheduled for payment on or before its due date, and is queued for approval by the appropriate person.

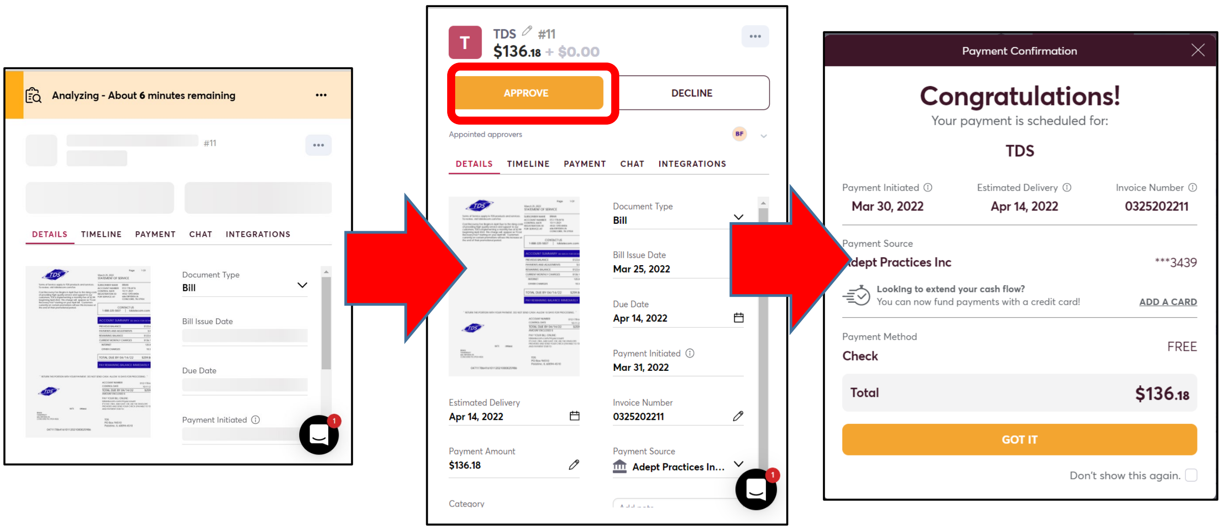

Figure 26 - Data Extraction From Uploaded Invoices and Approval Process in Corpay One

Once the approval process is complete, the payment information is available in the portal for future use. A payment from 2021 is shown in **Figure 27** below.

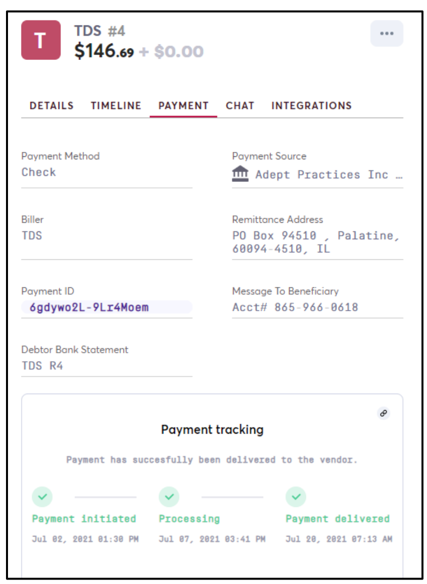

Figure 27 - Payment Status Tracking in Corpay One

More information on Corpay One is available on their website at www.corpayone.com.

Automatic Vehicle Mileage Tracking

Maintaining paper mileage logs is an unpleasant task for many professionals, and while we have covered a number of different mileage tracking applications in the past, including **QuickBooks Online Self-Employed**, **QuickBooks Online**, **TripLog**, and **Mileage Expense Log**, some in our team still can't live without **MileIQ**. Mileage is tracked using a mobile application for iOS/Android which uses location services to detect drives, and users are prompted to classify their activity by messages sent to the user via the mobile app. Like some popular dating applications, users are presented with drives, and they are then asked to swipe left if the drive is personal or swipe right if the drive is for business.

The app can also be used to track ancillary expenses like parking and tolls, which can all be summarized into PDF reports using the MileIQ dashboard and reporting portal shown in **Figure 28** below.

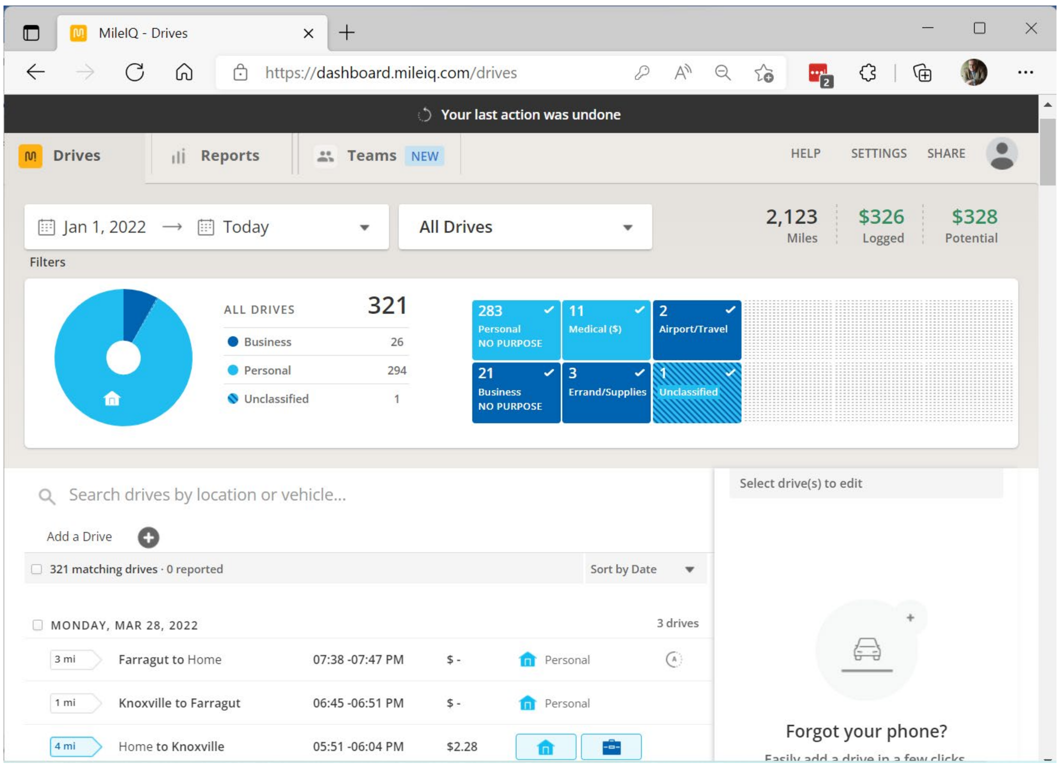

Figure 28- The Mile IQ Mileage Tracker

MileIQ is available online for $59.99 per year (or $5.99/mo).

Using Mobile Scanning Applications on iOS and Android

The transition to knowledge workers operating from home has left many remote workers without access to the workgroup scanners they had in their offices. Fortunately, scanning using a mobile device has improved significantly over the last few years, and apps like the **Adobe Scan** app (included with most Acrobat DC subscriptions) and **Genius Scan Pro** for iOS and Android can make workable scans from images captured with your smartphone.

Employees who prefer the quality and ease of use associated with a scanner that can scan documents to mobile devices (using an app), cloud services, or the ScanSnap Home software for Windows or Mac, this unit does duplex scanning at 15 pages per minute (30 images per minute) and its paper tray will hold up to 20 pages. This scanner for home and small home office use appears in **Figure 29**.

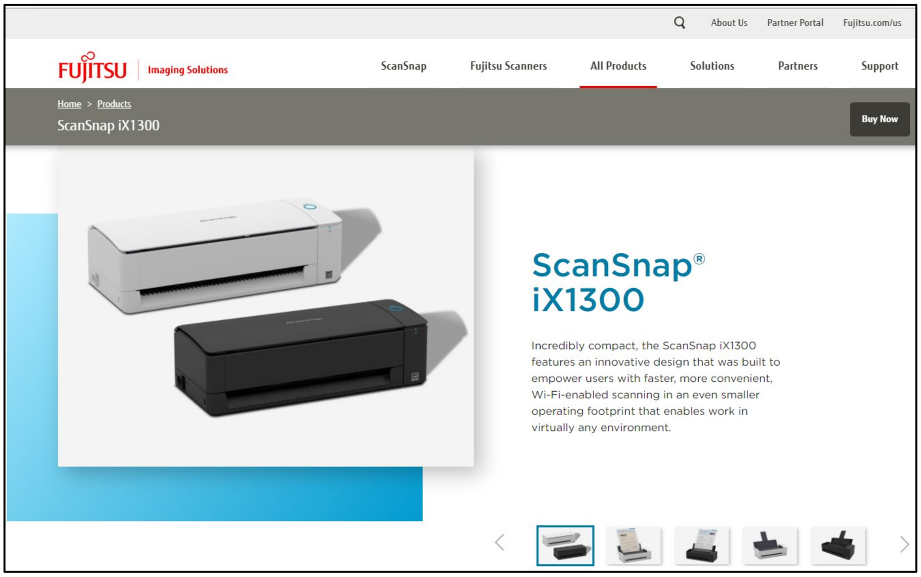

Figure 29 - The Fujitsu ScanSnap iX1300 For Home Offices With Light Scanning Workloads

Larger scanning jobs in most organizations will take place in the office using more robust scanning hardware like a Fujitsu fi-8170 (shown in **Figure 30**).

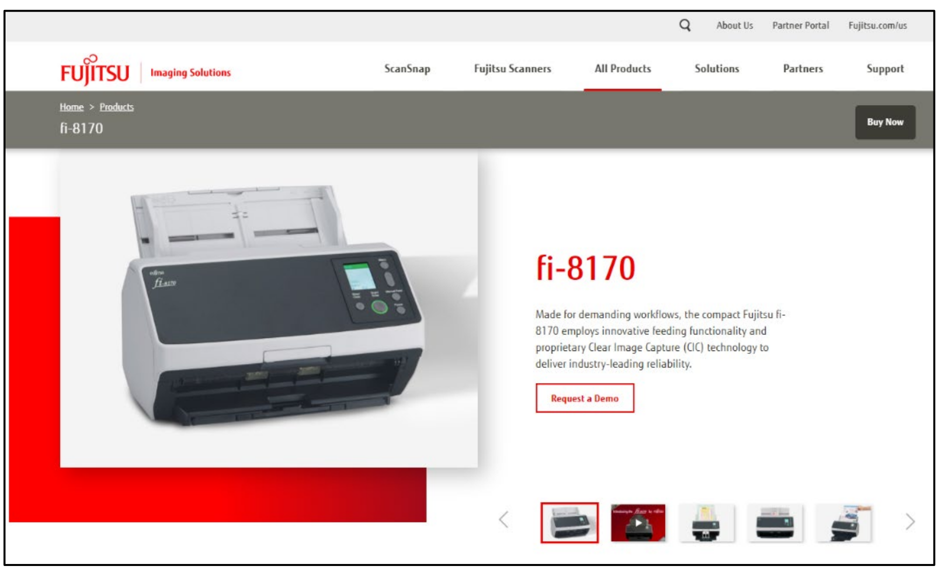

Figure 30 - Fujitsu's fi-8170 Workgroup Document Scanner Handles Robust Workloads