



Overview and PowerPoint Setup: Setting Up PowerPoint Correctly with the Quick Access Toolbar (QAT), Slide Master, and Formatting

Hello and welcome to the third lesson in this introductory module. In this lesson, you're going to learn how to set up the Quick Access Toolbar as well as the Slide Master in PowerPoint. Both of which are going to make you far more efficient and effective using the program. And you're also going to learn a little bit about how to set up slides themselves including how to adjust the slide size, how to adjust the theme and how to ensure that everything matches what your bank or other firm wants to see.

So specifically here, we're going to cover those three areas and we're going to start with the slide setup because it's a little bit easier to explain this and there isn't really as much to say. Then we'll progress toward the more involved topics toward the end.

So for the slide set up really the key thing to be aware of is that when you go to the Design Menu, so Alt, G right here, slides can be different sizes and if you press Alt, G, S, to go to slide size right here, you can see this firsthand.

[01:05]

You can select Standard (4:3) for the ratio and then (16:9) widescreen for the ratio right there. So if you change it to wide screen, this looks quite a bit different and if you go to the reading view, you can see that everything is much wider. This matches HD, high definition resolution and screen sizes, more closely.

However, often despite the fact that it is bigger and gives you more space, often you will actually just set it to standard. And I can actually press Undo to shift it back there. The reason being that again, you are printing out presentations for the most part in investment banking. So you want something that fits on a normal sized piece of paper.

[01:52]

So the bottom line with the slide size is that before you go in and start creating or editing a presentation, you want to make sure that is correct because it's going to be a lot of work to go in and redo all the slides if for example you change it to widescreen and then you have to go in and change around where all the text is located, where all the labels are and everything like that.



Now it's possible that your bank is using some kind of weird size for the paper. If that's true, then you have to ask someone and figure that out and change it to the right size. It's probably easiest to look at previous presentations that people there have worked on and use whatever slide size they have used. Here you can see the width is 10 inches and the height is 7.5 inches. If you are in a country that uses the metric system, which is every country outside the US, you're going to see centimeters here instead. So you can adjust this accordingly.

But that is one quick point I wanted to mention here that you want to be careful about the slide size before you start doing anything. We tend to use the standard size and not to use the widescreen one just to make it a little bit easier to print these out on paper.

[03:03]

The other thing I'll mention quickly about the design menu, Alt, G, is that if your bank has a particular PowerPoint theme that they use, you also want to make sure to reflect it here. Now my personal opinion is that most of these built in themes actually look quite bad. So we're not going to even bother. We're going to go with a very minimalist sparse layout right here.

But some banks do have their preferred themes and you want to be conscious of that. Ask around. Figure out if your firm has something like this that you should be using and if so, make sure you apply it in the beginning for the same reason. It's easier to do this upfront then to have to go back in later on and fix it or change it around.

And then the last thing I want to point out quickly is that if you haven't already done so, when you right click a text box or shape in PowerPoint and then . . . this is a bad example. Let me go to something better. So if you right click a text box or shape and go to Format Shape toward the bottom of that menu, you want a box that floats like this.

[04:04]

So if yours is stuck over here on the side, I would strongly recommend detaching it by left clicking and holding it and dragging and moving it out here. It's going to make it a lot easier to format shapes and figure out where they belong on slides if your formatting box is floating like this one is.

So that's about all I wanted to mention on that point about slide setup. Let's go to point number two, the Slide Master.



The Slide Master is a very important topic and we're actually going to be spending several lessons on it later on in this course. But for now, I wanted to introduce you to this concept and show you how you can use it for a variety of different purposes. So the Slide Master, if you go to Alt, W, M to access Slide Master, essentially this lets you create templates for different types of slides.

[05:02]

if you have a slide with a title at top and then some text, you can create a template for that. And then if you have one for just a title, you can do that. If you have one for a company profile which is something we'll be getting into later on, you can also create a template for that. And it lets you handle these different scenarios. And the advantage is that, let's say that you have a couple slides that use something like this company profile template.

If you are not using the Slide Master for this and you want to change the font size or you want to change the font face or something like that, you would have to go in to each slide manually. So to illustrate what I'm talking about let's just go down here. If you have, say, four profiles you have to go into each one manually, make all your changes and cycle through and it would be a very time consuming process because you have to make all your changes on each individual slide and then verify that each change is correct and so on and so forth.

[05:59]

Whereas if you use the Slide Master as we recommend, then you can just make the change once. If you want a change the date, you can go to the bottom and just change date once and that will be reflected everywhere.

So let's say I want to change the date to 2015, by using the Slide Master, I can do just that and then on every single profile slide here, it changes to 2015. And so you only have to make the change in one spot. So the Slide Master can be a very powerful tool. The thing is that most people just use it for templates.

You can also use it to ensure formatting consistency. And to illustrate how that works, I'm going to go to the first slide in our Slide Master over here. This is the master theme slide or office theme Slide Master, as PowerPoint calls it. And whatever is on here will be inherited by everything else down here.

[07:00]



So if you set your logo at the bottom in a certain way or you have things over here on the side that are set up a certain way or you have a certain font size, every other type of template that you create will start by using those styles by default. So with this slide at the top, what you can do is put over here everything that you are going to need for formatting. So I have set up our font face area and set the size 24 right here. And then below that I have another font size 14 for any type of title text and the normal bullet and subtitle text size 12 and then chart, profile, and currency text size 10.

This is important because if you're ever creating a new slide rather than having to go back and forth and check other slides in your presentation to see what font size you're using, it's very easy because as soon as you insert it, it just appears on the left hand side.

[08:00]

So, for example, if you press Alt, M, C to close out of the Slide Master view, let's say we insert a new slide right here. Well, I don't have to guess what font to use because it's all laid out on the left-hand side of the slide. I don't have to guess about the colors because they're all laid out right here. I don't even have to guess about the types of boxes or the border widths to use because they're all laid out right here.

Now you don't have to do this. A lot of people skip it, but in my opinion it saves you a lot of time and headache and makes things far easier, especially if someone else later on is editing your presentation.

So that is one way that you can use this. Now we're not going to get into actually how you create all these different types of boxes and shapes for now. That's something we're going to be covering in the second module here. But I just wanted to introduce this concept that you want to set the formatting up front and make sure it's reflected in all the template sides that you're using in your presentation.

[09:02]

The other important thing to note is that since these are off to the left hand side of the slide, they're not going to appear when you actually print this out. They're not going to appear when you actually view the presentation. They only appear in editing mode and they only appear to help you make the appropriate edits and to set up everything correctly. Let's close out again with Alt, M, C.



That's pretty much what I wanted to cover for the Slide Master, so just a few quick points there and I want to explain how and why we're using it. You'll get a lot more practice with the Slide Master later on when we get in to the dedicated lessons on the Slide Master. But again for now, I'm just introducing the concept.

And then the last major topic I wanted to cover in this lesson is the Quick Access Toolbar. We went over this briefly in the first lesson here. But this is important because it lets you build faster versions of shortcuts that are normally cumbersome or shortcuts for commands that normally do not have shortcuts at all in PowerPoint.

[10:00]

The example I showed you before is probably the best one to illustrate why this is so important. But the built in PowerPoint command for alignment is not exactly intuitive. To access it, you have to press Alt, H and then G and then A for align and then L for left, R for right, C for center. That part is intuitive, but having to press Alt, H, G, A first is quite cumbersome. It's quite cumbersome to reach on your keyboard.

So a much better solution is to be able to press something like Alt, 1 and format everything like that. Of course the problem is that PowerPoint doesn't know what shortcuts you're going to use the most frequently. So you have to make that call yourself and decide what the best shortcuts to use for this Quick Access Toolbar actually are. Now the way I typically do this is that you can just right click here and go to Customize Quick Access Toolbar.

[11:02]

And then PowerPoint will actually let you export a customization for this area. And it will also let you import one. So if I go to Import Customization File, I can go to my folder right here and you see this file PPT-01-03-PPT-Setup-QAT-export and it is the .exportedUI file right here.

I can actually open this and then say, "Yes, replace all existing ribbon and Quick Access Toolbar customizations" and now I get everything up here. And you can see the reason why I've chosen these commands because they're very common. The shortcuts to access them are a little bit cumbersome as is and we're going to be using them with high frequency. Aligning objects is probably the single most important command in PowerPoint. In investment banking, really any type of finance role or any type of business role in general, you're going to be aligning shapes all the time, so that needs to be the number one command here.

[12:01]

<http://breakingintowallstreet.com>



You'll be changing font colors and fill colors and border color for shapes all the time as well, as general formatting. So that explains these next four commands. You'll be arranging shapes as well which is a slight variation on alignment. This basically refers to moving shapes backwards and forwards in front of other shapes and you'll be doing that a fair amount as well. Changing the font size is very common. And then we have some other common shortcuts here for drawing rectangles, text boxes, shapes, connector lines and then merging shapes.

So I've gone through and tried to select the most common ones and list them here. When you hit OK, you can see that everything is now updated and you can now access all these keys. And it may not seem like that big a deal to be able to type Alt, 1 and then L for alignment. But if you try the normal short cut key Alt, H, G, A, L, added up over time over thousands of operations, you're going to save of hours and hours by pressing Alt, 1, L instead.

[13:01]

And the same goes for something like changing the font size. You could press Alt, H, FS. Or with our custom shortcut, you could press Alt, 7. Alt, 7 is much quicker to type and is also a little bit less cumbersome to type as well because you can do it all with one hand without reaching any weird position.

Now once you move past the basic nine shortcuts here, PowerPoint starts using 09, 08, and 07. What this means is that now you can no longer type these with one hand. You're going need to press Alt and release it and then 09 and then that'll let you access the shape menu or Alt and 08 to access the connector menu right here. So you do need to be aware of that and make sure that any common shortcuts that you use the most often are all here on the left-hand side so that you do not have to use the mouse so that they all are just Alt and then the number that you want to use.

[14:01]

I've arranged them in a way that's helpful for me. But feel free to change this around yourself. You can certainly do that if you go to the options menu with Alt, T, and then O. You can go to Quick Access Toolbar and you can customize everything here, you can add and remove commands yourself.

So to reiterate, the criteria for using the Quick Access Toolbar is that it has to be a very common shortcut. It has to be somewhat long and cumbersome and there should not be an existing control shortcut for it. So something like hiding the ribbon with Ctrl + F1, you would not use



here because it already has a shortcut and it's pretty quick to type. You can do it with one hand, so there's really no point in doing that.

Opening a presentation or creating a new presentation would also be silly because Ctrl + O and Ctrl + N are also both easy to type and you can almost do those with one hand. You're not going to be opening presentations that much anyway.

[14:57]

Use positions 1-4 for the most frequent commands, then 5-9 for the less frequent ones and then 01-09 for the even less common ones.

You can also import and export your customized Quick Access Toolbar as I showed you before. The only catch here is that the PowerPoint versions have to match up. If you're using PowerPoint 2013 or 2016, it's no problem. They'll always work. But 2007 and 2010 exported toolbars will not work correctly in newer versions, and vice versa. The ones from the newer versions will not work correctly in the older versions of PowerPoint. So just be careful of that.

If you cannot import this for whatever reason, I would recommend just taking a few minutes and customizing the Quick Access Toolbar yourself. Yes, it takes some time to set up but you're looking at spending five minutes to save hours and hours and days of time later on if you do this correctly and if you're using PowerPoint frequently.

[15:58]

So don't let your bank's policies or your PowerPoint version stop you. If you don't have this or you can't import my customized Quick Access Toolbar, just create yourself and take a few minutes to do it via the menu for the customization of the Quick Access Toolbar. With that all said, let's now move into your exercise.

Here's what I want you to do. I want you to create your own customized Quick Access Toolbar using the steps that I just showed you and the menus that I showed you. So the items that should be on here are Align Objects and then a Separator, Font Color, Shape Fill, Change Outline Color, More Options, Arrange, Font Size, another separator and then Rectangle, Draw Horizontal Text Box, Shapes, Straight Connector and Merge Shapes. Now for the easiest way to do this, just go back to the other presentation here.

[16:52]



So I just reset everything in my Quick Access Toolbar. Press OK. The easiest way to do this is to right click, you go to Customize Quick Access Toolbar and then where it says Choose Commands From change it to All Commands and then you'll be able to find everything right there.

So pause the video yourself right now and then find the relevant commands, click on Add and then make sure they're over here, add separators where necessary and then you can refer back to the list over here for all the commands that you should be including. So pause the video right now and try it yourself. When you're done, un-pause it and then we'll walk through this together.

[PAUSE VIDEO FOR EXERCISE]

Okay, good. So let's right click and go to Customize Quick Access Toolbar, Choose Commands From, let's set this to All Commands and then we'll go to Align Objects. I can just type AL or just A actually and search for this right here. Align Objects, let's add that. Let's add a separator because this is a separate group of commands.

[17:58]

And then for Font Color, I just press F to jump down here. Here's our font color. So I'll add to this. And then Shape Fill, I'll type S to move down there and then let's find Shape Fill, Change Outline Color. So press C and then Change Outline Colors right here. And then More Options is basically a generic formatting menu that let you make changes to a lot of different types of text boxes and shapes. So it's very, very useful. And if I just scroll down More Options, the one we want is the second one listed here. So let's just click on Add and add that.

And then the last one for this group is the Arrange button. So this is the one we want, the second one that actually has the shape icons. We'll click Add.

[18:57]

Also in this group we want to control the font size. So let's go down, quick on add and bring that over. And then click on separator and then add and then our next section here we have the rectangle first off. The rectangle is probably the most common shape. So I actually created a separate icon for that or separate shortcut for it right here. And then we also want to draw horizontal text box, another very, very common shape you're going to be creating a lot.

And then we want the generic button here for creating any type of shape that we want. So again, it's the second one right here with those shape icons right next to it, click on Add. And



then Straight Connector. So let's take this one right here and then Merge Shapes is not quite as common which is why it's at the end, but it has its uses, as you'll see later on.

[19:57]

So now we have the full menu and I can just click OK here at the bottom and now we can access everything using Alt, N, number shortcuts here at the top. Again it's much easier to import a customization file than to recreate this manually. But if you have to recreate it manually, I definitely think it's worth the time to do so and it's going to save you a whole lot of time in the long term. So that's pretty much it for this lesson.

To do a quick recap and summary now, we covered the slide set up and I showed you how used to be careful of different sizes and themes. Then I showed you the Slide Master and explained the basics and also how we use it for formatting consistency as well. Then we went through the Quick Access Toolbar and I showed you how you can build faster versions of shortcuts or add shortcuts for commands without them using this. You learn about the criteria for using the QAT. You learn about the order and then the import and export commands and then you got practice building a customized QAT on your own.

[21:04]

So that's it for this lesson. Coming up next we're going to take a step back and look at all this at a higher level and see some examples of how you actually use PowerPoint in investment banking, private equity, hedge funds and other roles. Then you'll get the quick start guide to this course. And then we'll get started with Module 2 and going into the fundamental shortcuts you need to know there.