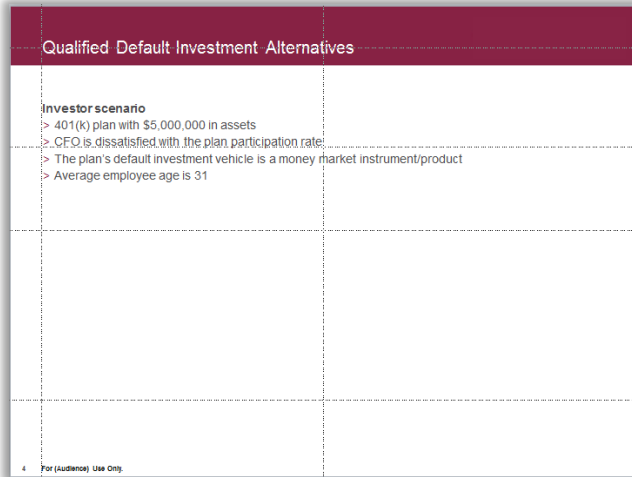
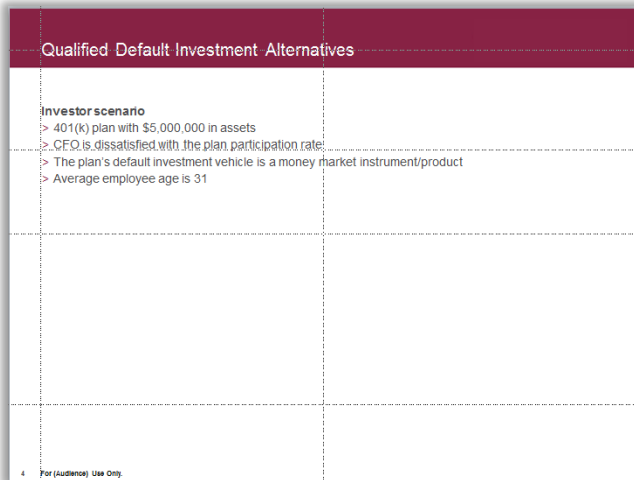


There are a lot of PowerPoint users who are thrilled at the release of PowerPoint 2010. That is until they begin the process of converting their PowerPoint 2003-created presentation to PowerPoint 2010 (or 2007 for that matter). The following series of tutorials will take you through that process, step by step. We'll even address some details that aren't necessarily PowerPoint-related but should perhaps be considered as you move from one format to the next. Before we get into these let's start with some basics.

▼ Here is an example of your presentation as it “used to look” in PowerPoint 2003.



▼ Now here's an example of that same presentation as it looks when you open it in PowerPoint 2010.



Wait – you say. They look exactly the same. And yes – they do. For all practical purposes, you could take your “old” PowerPoint presentation, open it in PowerPoint 2010 and run with it. Until you have to edit it, that is. And that's where the problems start. Here is a list of problems that occur during the transition from PowerPoint 2003 to PowerPoint 2010.

This tutorial assumes that you are using an existing Microsoft PowerPoint theme – or that you’ve created a custom theme.

## Step 1: Getting Your Old Slides to Your New Template

▼ Open your old document in PowerPoint 2010

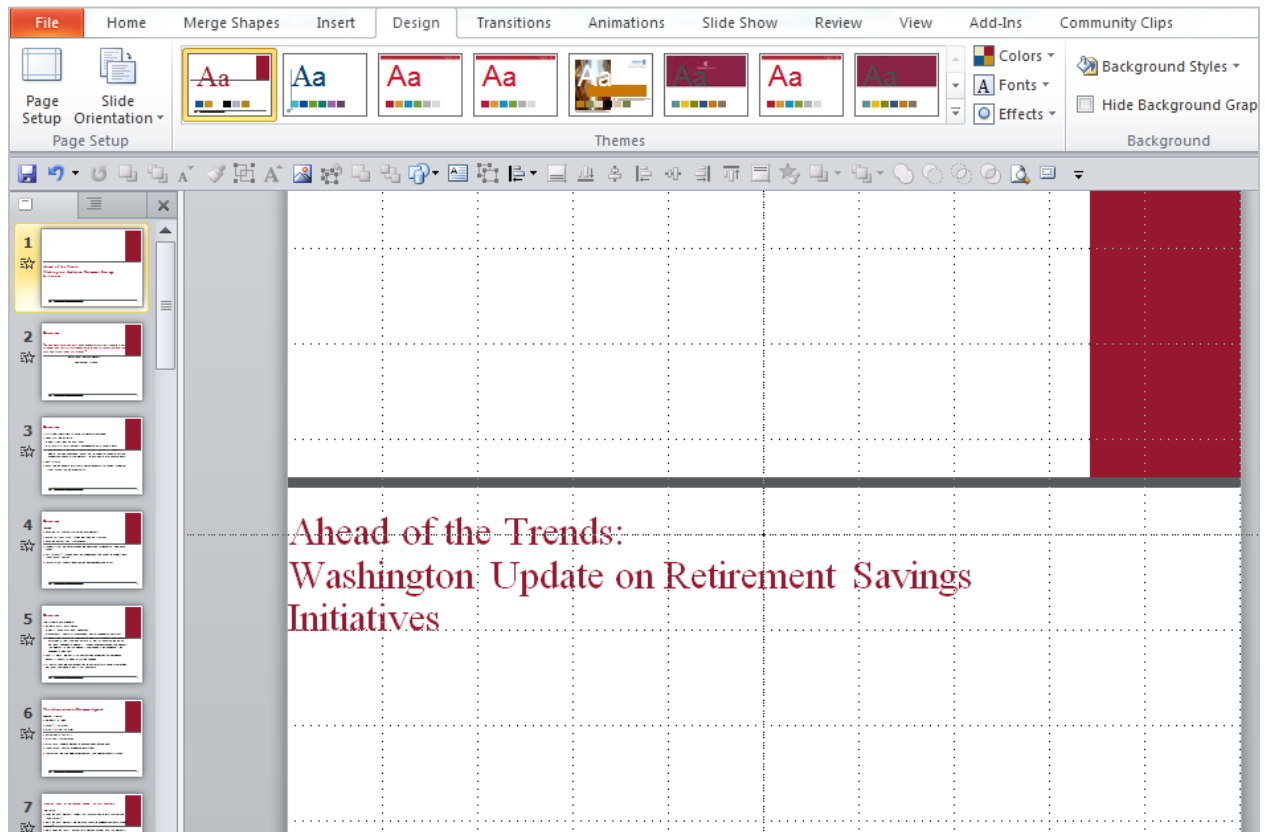



Figure 3

▼ Make sure you are in Normal View by clicking the **Normal** option under the **View** tab or by clicking the

Normal button  toward the bottom right of your screen

▼ Click the Design Tab on the toolbar

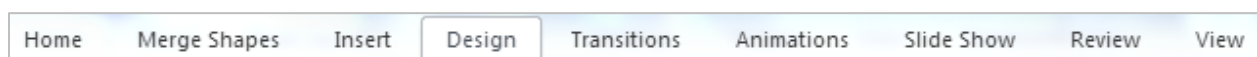


Figure 4

▼ Choose a new theme for your presentation (our custom theme is titled Generic Master Theme)

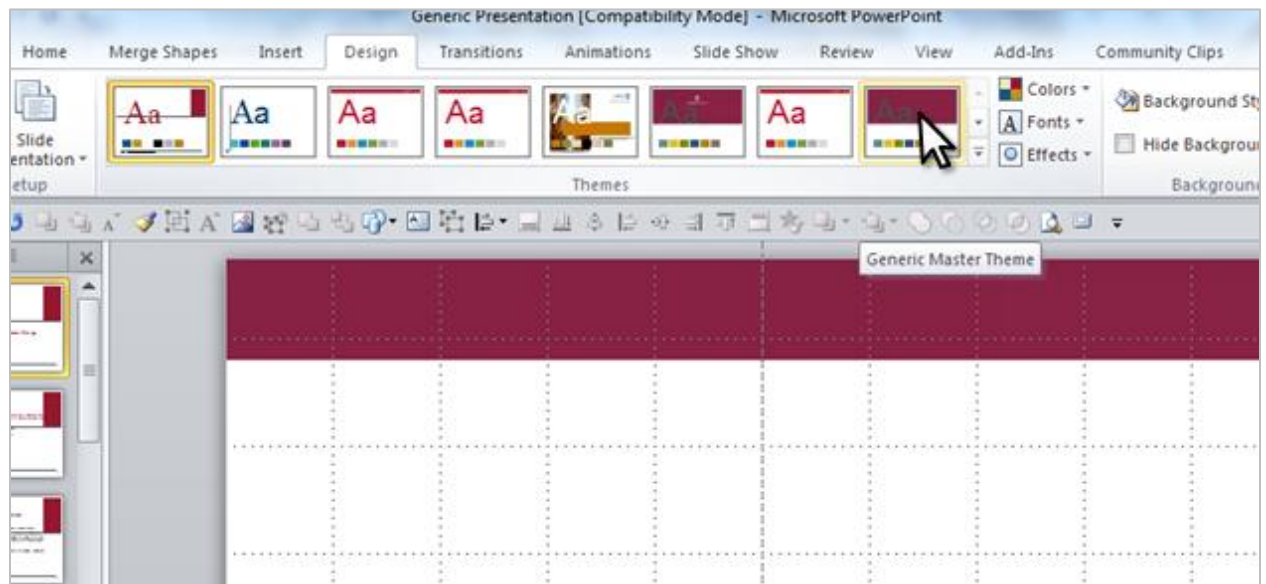


Figure 5

Now that you've applied a new theme, you'll want to make sure that each slide is using the correct Layout.

Note: At any time, perform a File > Save As > [New Name].pptx. The .pptx extension is for PowerPoint 2007/2010. The .ppt extension is for PowerPoint 2003 or older.

## Step 2: Applying Slide Layouts

▼ To find your layout options, **Right Click** the Slide Background (a non-text box occupied section) of the first Slide, select **Layout** and choose proper format. In this case we've chosen **Title and Content**

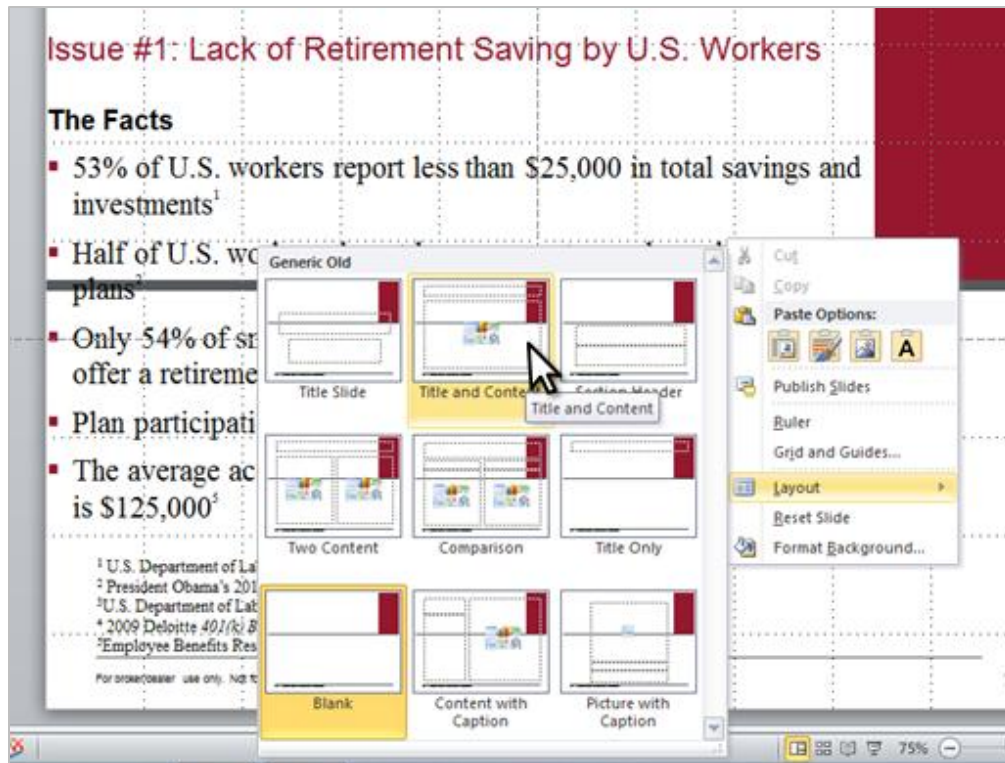


Figure 6

▼ After you've chosen the proper format, **Right Click** the Slide Background once again and hit **Reset Slide**

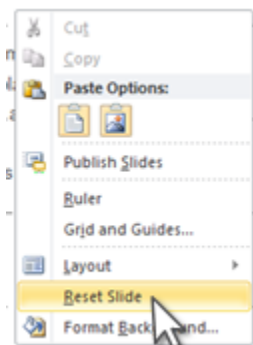


Figure 7

Repeat for each Slide, selecting desired layout from Layout Dialog

## Step 3: Clean Up

In a perfect world all text and clutter would align itself in place instantly. Unfortunately the transition from old to new is often less than smooth. For this reason it becomes necessary to fix the errors brought on by the conversion. Here are some of the most common errors you'll find after bringing your old content into a new environment

- a) My Text is in the Wrong Place – or I hit Reset and nothing happens
  - b) My Bullet Points have Disappeared, or I have bullet points where I shouldn't
  - c) My Bullet Points have been Widowed
  - d) My Bullet Points End with a Period
  - e) Extra Spacing is Throwing things Off
  - f) The Wrong Things are being Capitalized
  - g) My Superscripts Have Disappeared
  - h) I'm Having Issues with my Graphs
- a) My Text is in the Wrong Place. To correct the issue we'll need to take some additional steps

▼This is what the Slide looks like on the old template. "A" is a running header; "B" is the bulleted text

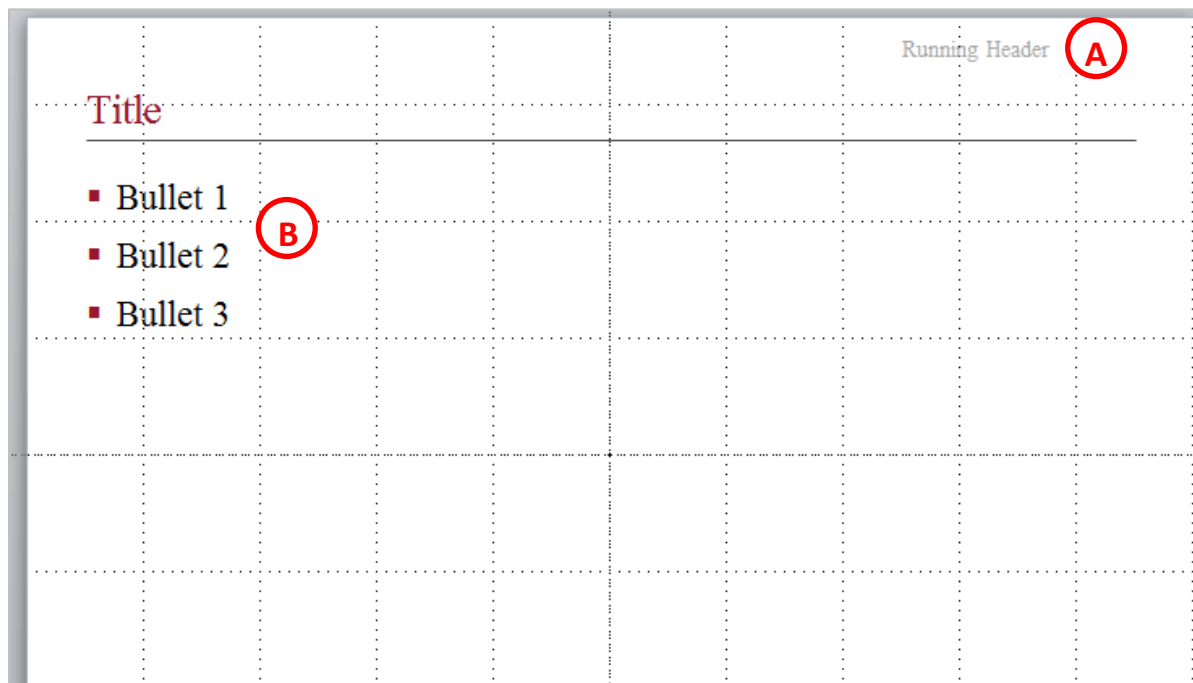


Figure 8

▼ Figure 7 shows what the new template looks like with empty Placeholders. “A” is a running header; “B” is the bulleted. The slide Placeholders are driven by your slide Master/Layouts (running header text box)

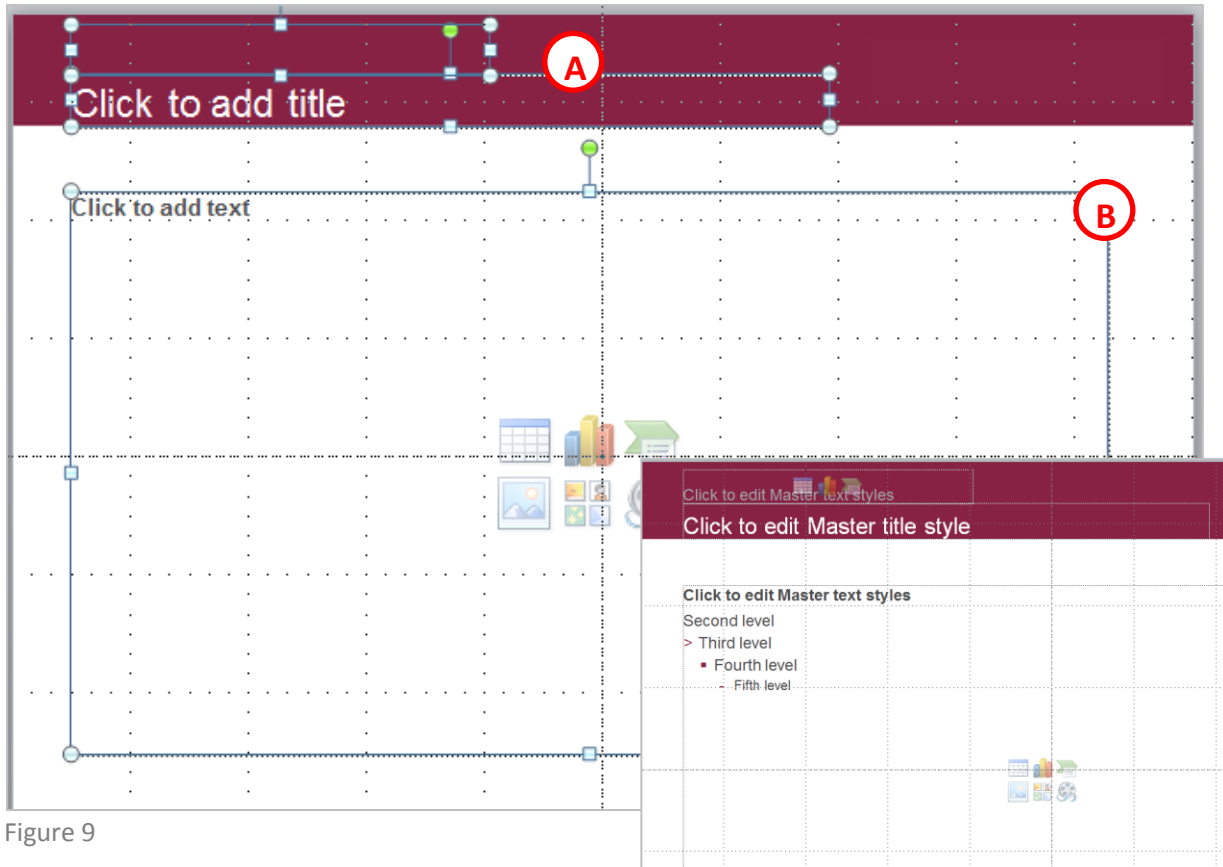


Figure 9

▼ After being converted and Reset, the “running header” text (A) has moved to the Bullet Point Placeholders. And the bulleted text (B) has moved to the Running Header Placeholder causing content to run off the border of the Slide

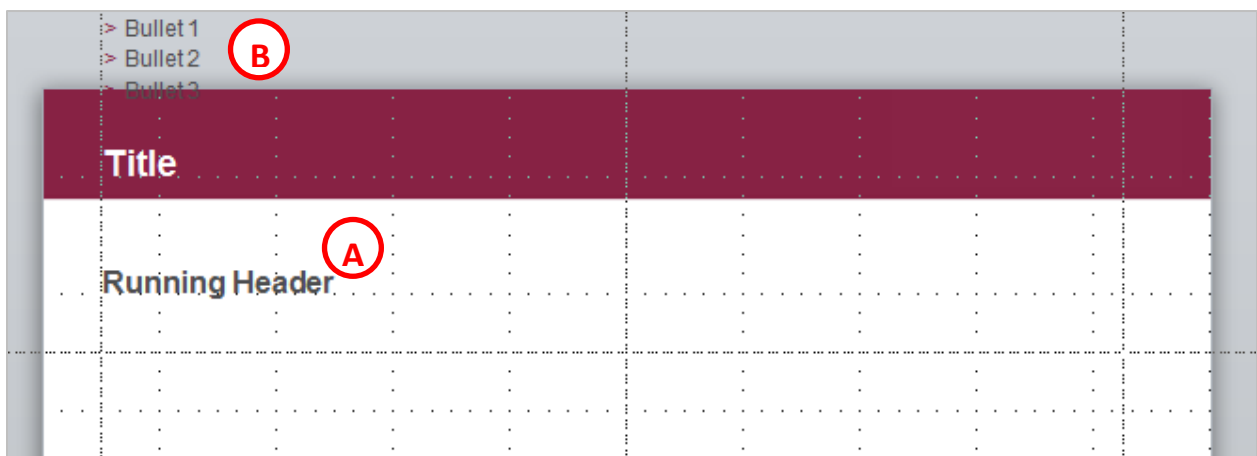


Figure 10

▼ Before switching content, preserve your text: **Copy** and **Paste** your Text Boxes somewhere off to the side of the slide. “1” is our new running header, “2” is the new bulleted text

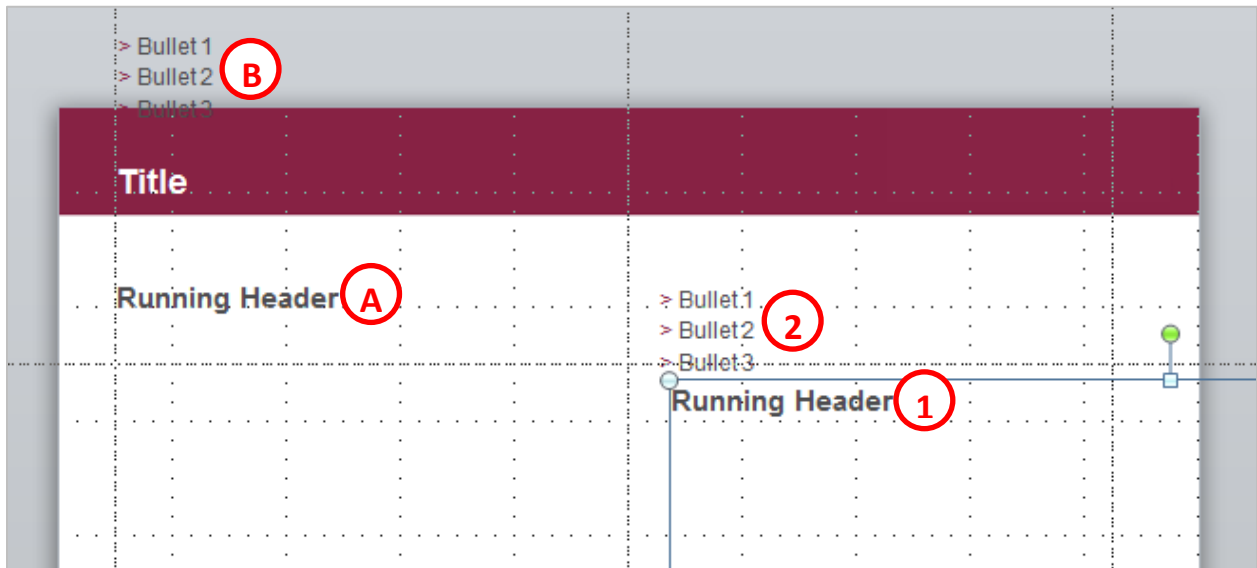


Figure 11

▼ **Delete** the content from your original Text Boxes but do not delete the boxes themselves. The Placeholders will remain.

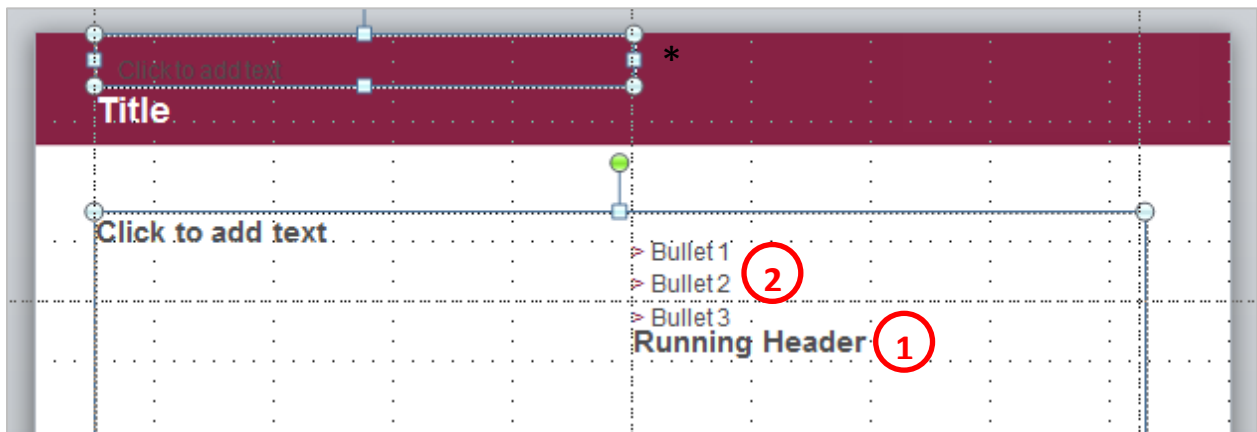


Figure 12

*\*Notice that the “Running Header” Placeholder is not formatted correctly. See Figure 9. This is a bug in PowerPoint 2010. To correct the formatting simply select the offending Placeholder (hold the **CTRL** key down and hover over the Placeholder) and hit **Delete**. The properly formatted placeholder will appear as follows.*

▼ Copy the text from one of your preserved Text Boxes and Paste it into its proper Placeholder

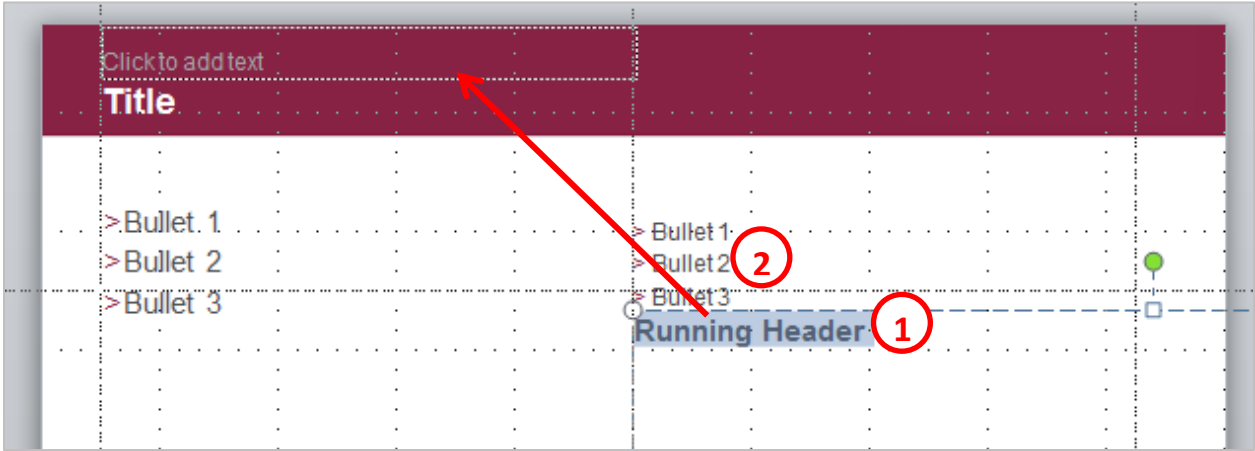


Figure 13

▼ Repeat the action for the second text box

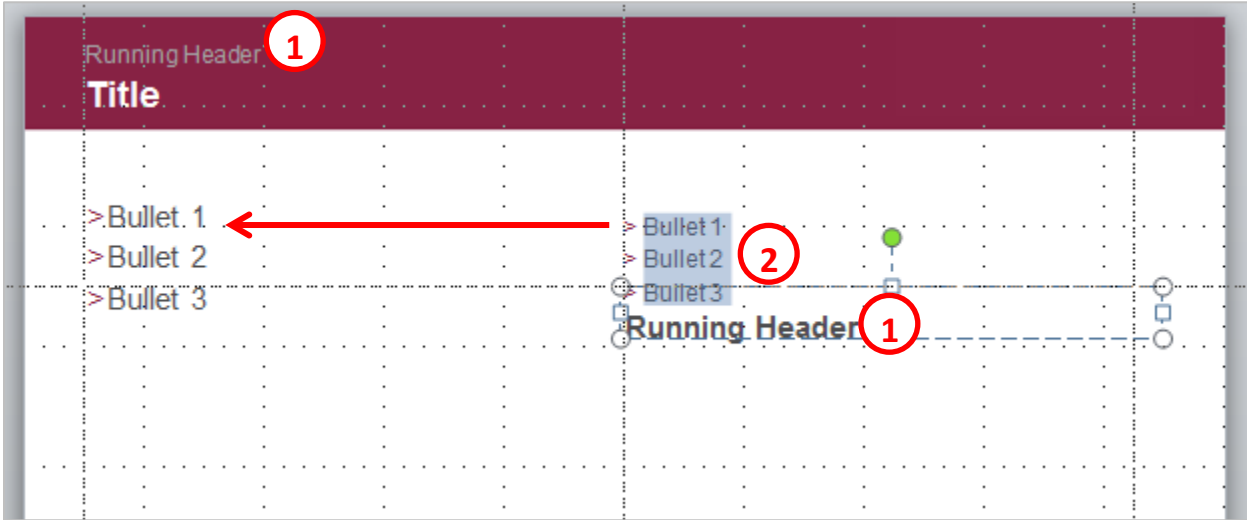


Figure 14

▼When you've finished, **Delete** the extra text boxes

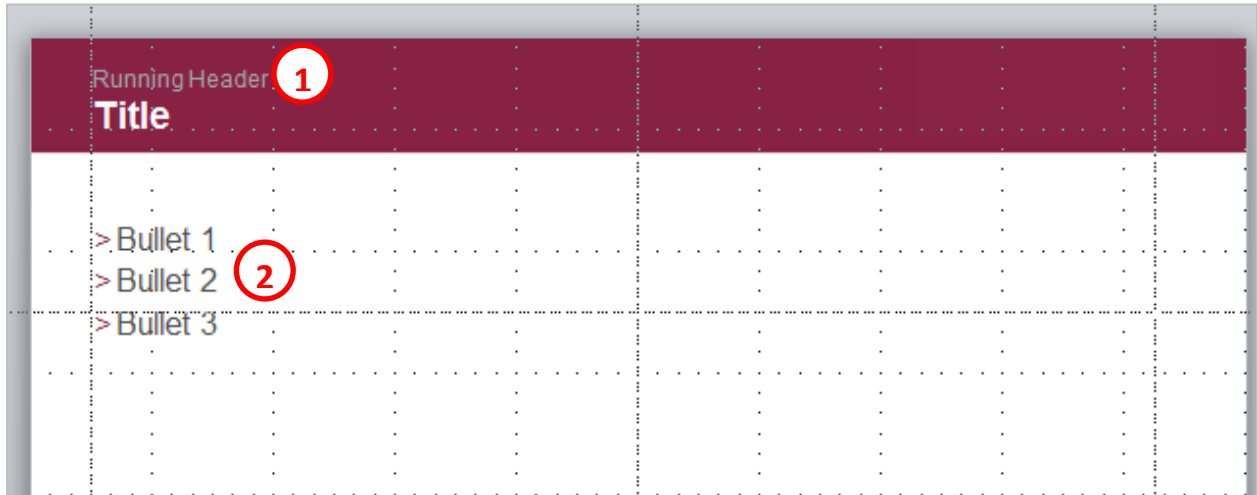


Figure 15

b) My Bullet Points have Disappeared or I Have Bullet Points Where I Shouldn't.

The only way you'll know this, is to know what is on your Master/Layout. The Designer of your Template may have provided you with this information. If not, go to View > Slide Master in the Ribbon. Here you will see your bullet levels as shown in the example in the inset in Figure 9.

But no matter what: **DO NOT USE THE BULLET BUTTON** to get your bullets back! If your template has been formatted correctly, you won't need to



Figure 16

▼ **Highlight** the lines that should have bullet points; increase the Indentation by pushing the **Increase List Level** button on the Ribbon (NOTE: the Indentation correlates directly with your new Template regulations, you can adjust the settings on the master slide)

Before

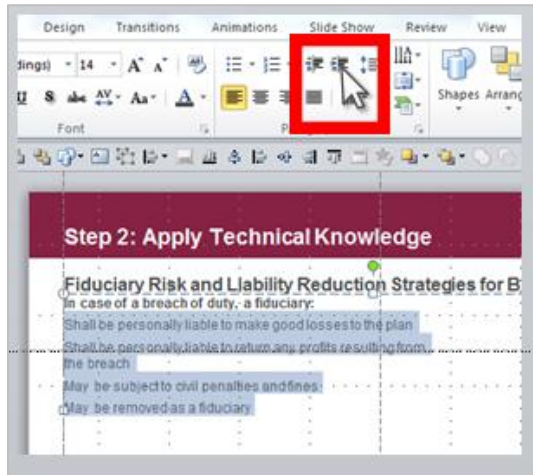


Figure 17

After

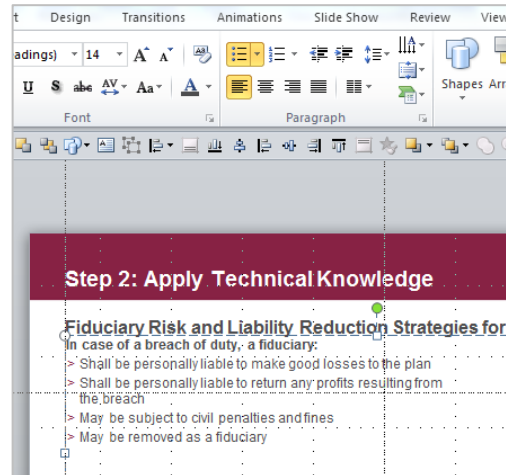
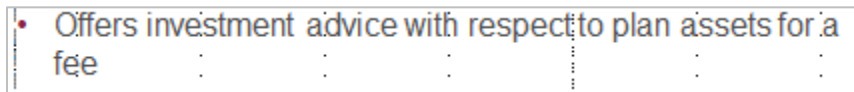


Figure 18

Repeat **Increase List** until you've reach the desired list level. You can always use the **Decrease List Level** button to return to a previous level.

c) **My Bullet Points have been Widowed.** Widows are bulleted statements where a single word spills into the next line, you can correct this by placing your cursor after a word and creating a **Soft Break** (Shift + Enter)

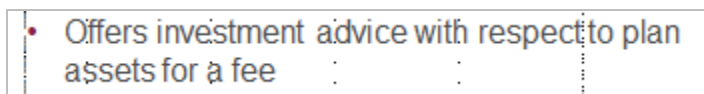
Before



• Offers investment advice with respect to plan assets for a  
fee

Figure 19

After

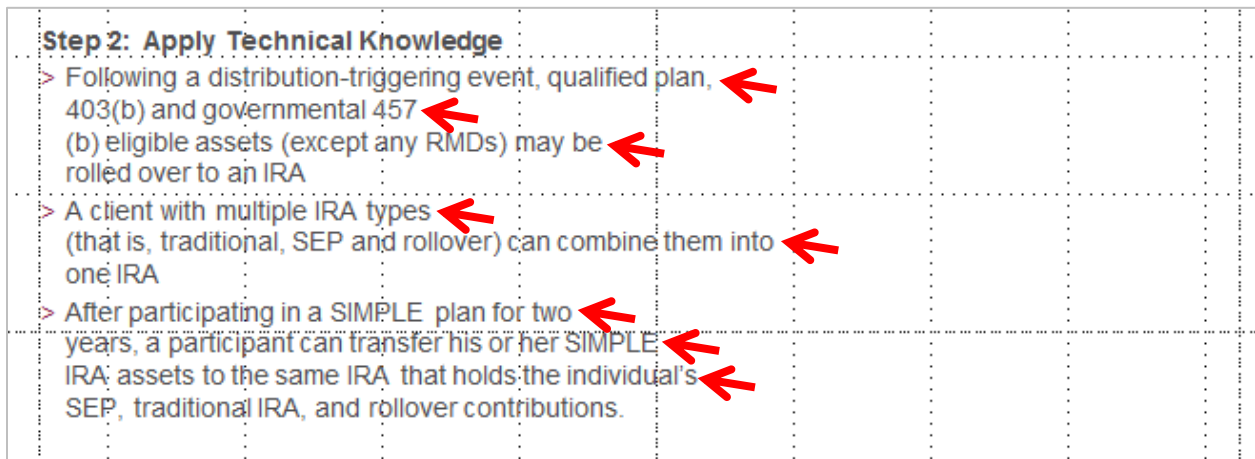


• Offers investment advice with respect to plan  
assets for a fee

Figure 20

▼The opposite may also occur, causing unneeded breaks in bulleted statements

Before (notice all the places an unnecessary break occurs)

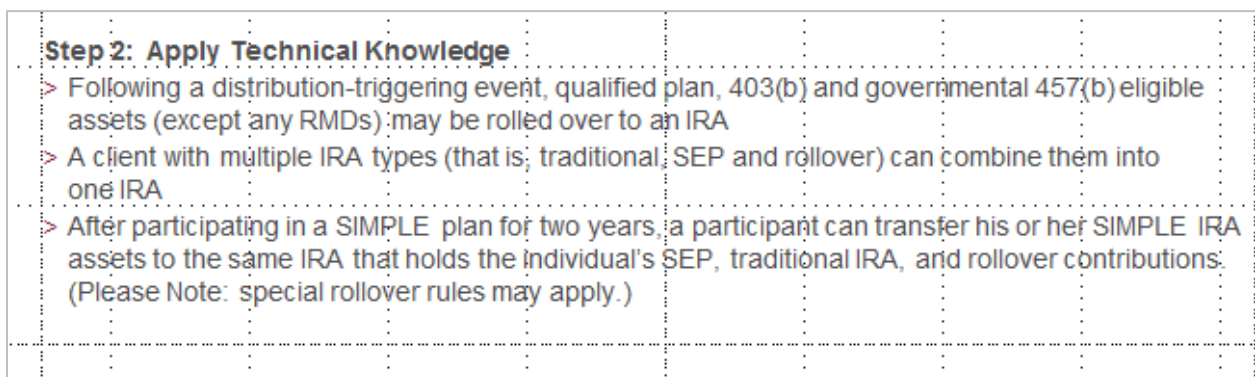


**Step 2: Apply Technical Knowledge**

- > Following a distribution-triggering event, qualified plan, 403(b) and governmental 457 (b) eligible assets (except any RMDs) may be rolled over to an IRA
- > A client with multiple IRA types (that is, traditional, SEP and rollover) can combine them into one IRA
- > After participating in a SIMPLE plan for two years, a participant can transfer his or her SIMPLE IRA assets to the same IRA that holds the individual's SEP, traditional IRA, and rollover contributions.

Figure 21

After (now that all those have been Deleted, the text can fill the page properly)



**Step 2: Apply Technical Knowledge**

- > Following a distribution-triggering event, qualified plan, 403(b) and governmental 457(b) eligible assets (except any RMDs) may be rolled over to an IRA
- > A client with multiple IRA types (that is, traditional, SEP and rollover) can combine them into one IRA
- > After participating in a SIMPLE plan for two years, a participant can transfer his or her SIMPLE IRA assets to the same IRA that holds the individual's SEP, traditional IRA, and rollover contributions. (Please Note: special rollover rules may apply.)

Figure 22

- d) **My Bullet Points End with a Period.** Standard Slide etiquette dictates that bullet points should not end in a period. This rule is not entirely universal and is therefore susceptible to exception. When in doubt **Delete** the period. If the bullet contains more than one sentence, however, it's acceptable to use a period to separate the inner sentences. Also if the bullet poses a question it's acceptable to end with a Question Mark

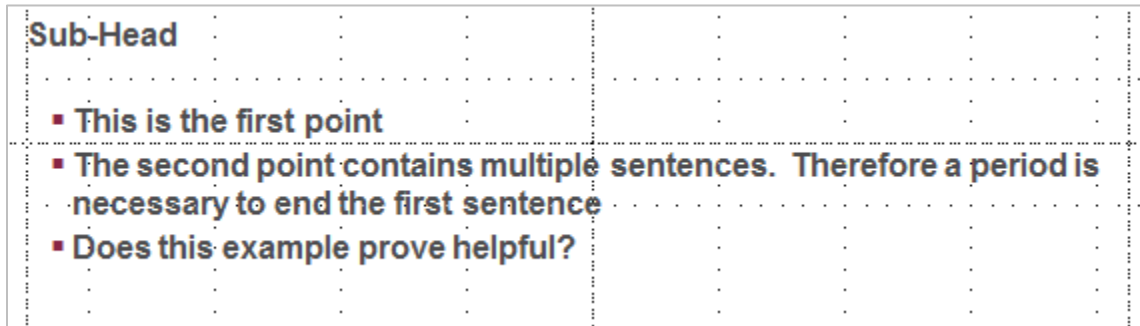


Figure 23

- e) **Extra Spacing is throwing things off.** Here it can be seen that an extra space below the text is causing content to run off the screen, solve the problem by **Deleting** the space

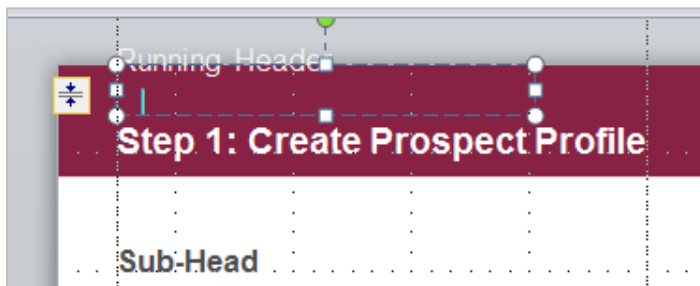


Figure 24

▼ Extra spacing can also occur between bullets, you will also have to delete these.

Before



Figure 25

After

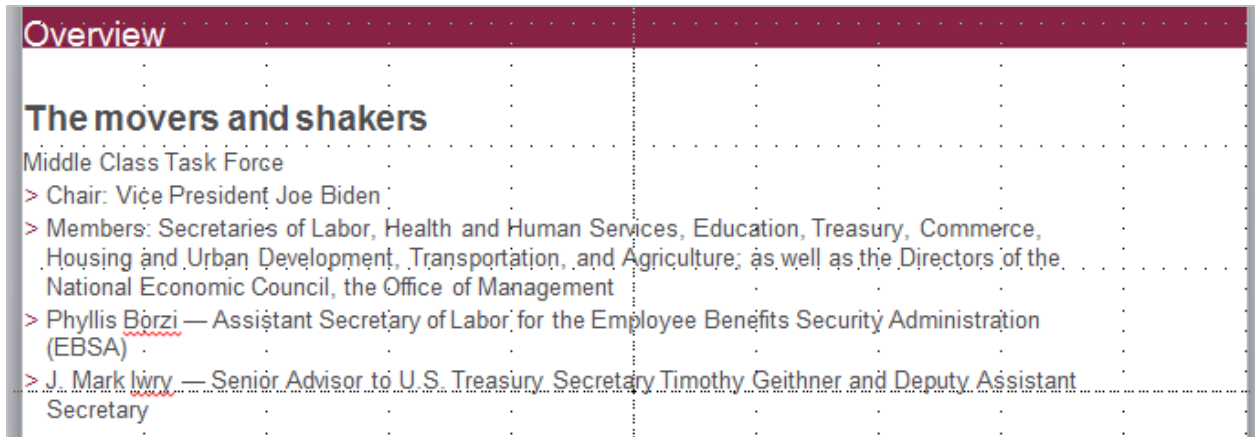


Figure 26

- f) The wrong things are being Capitalized. Your company's Graphic Guidelines have very specific rules about Capitalization. For example, words in title sections that are not articles such as *a*, *the*, *in* may need to be capitalized. This can be changed "manually" by retyping each incorrectly capitalized letter.



Figure 27

▼To quicken this process, highlight the affected text and use the **Change Case** button then select **Capitalize Each Word**

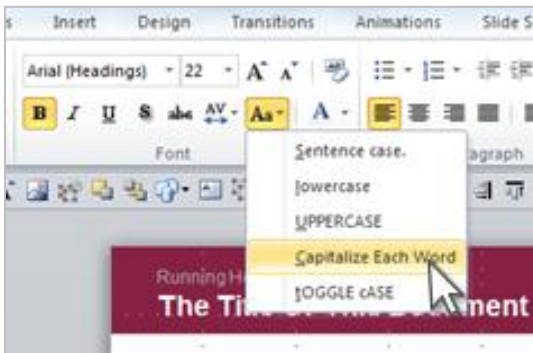


Figure 28

g) My Superscript has disappeared. If superscripts are lost in the conversion, they will appear as normal sized characters and cause confusion

▼ Select your misformatted superscript,

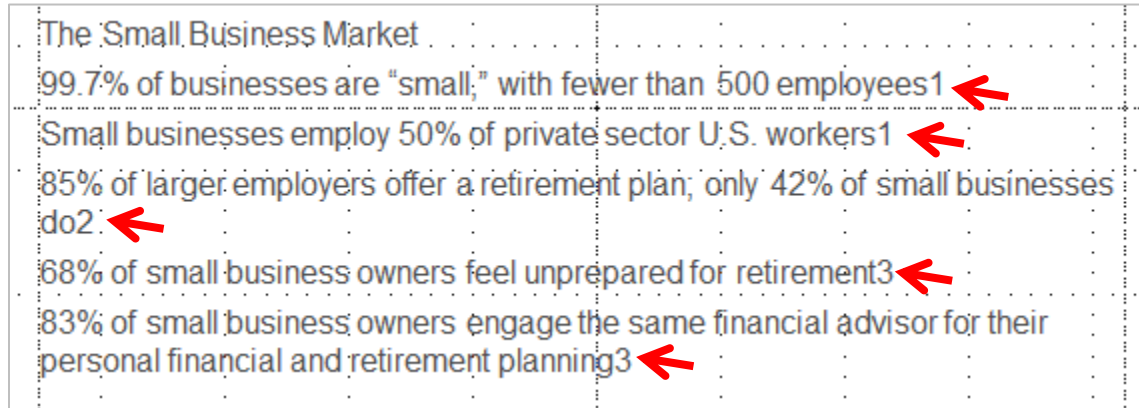


Figure 29

▼ right click and select **Font**

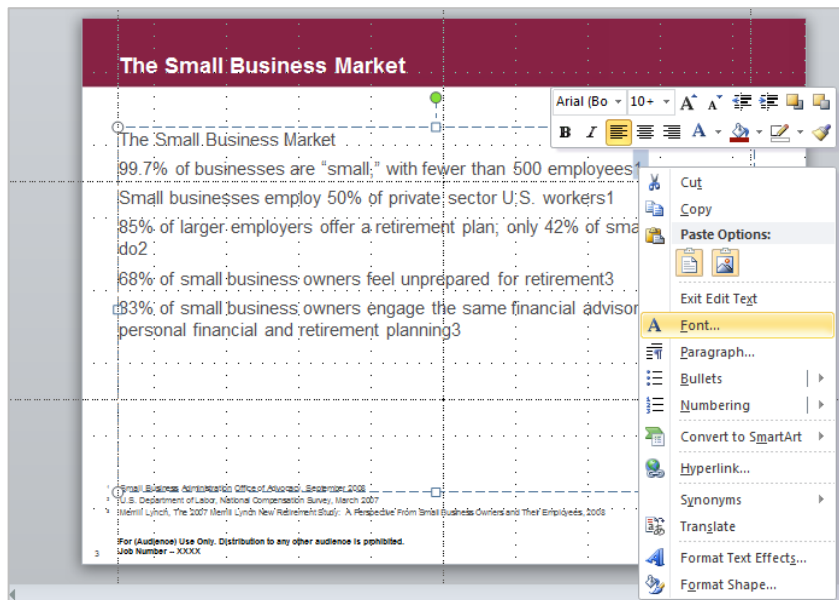


Figure 30

▼When the menu pops up check **Superscript** and adjust **Offset** to 30% or whatever Offset you'd like to default to

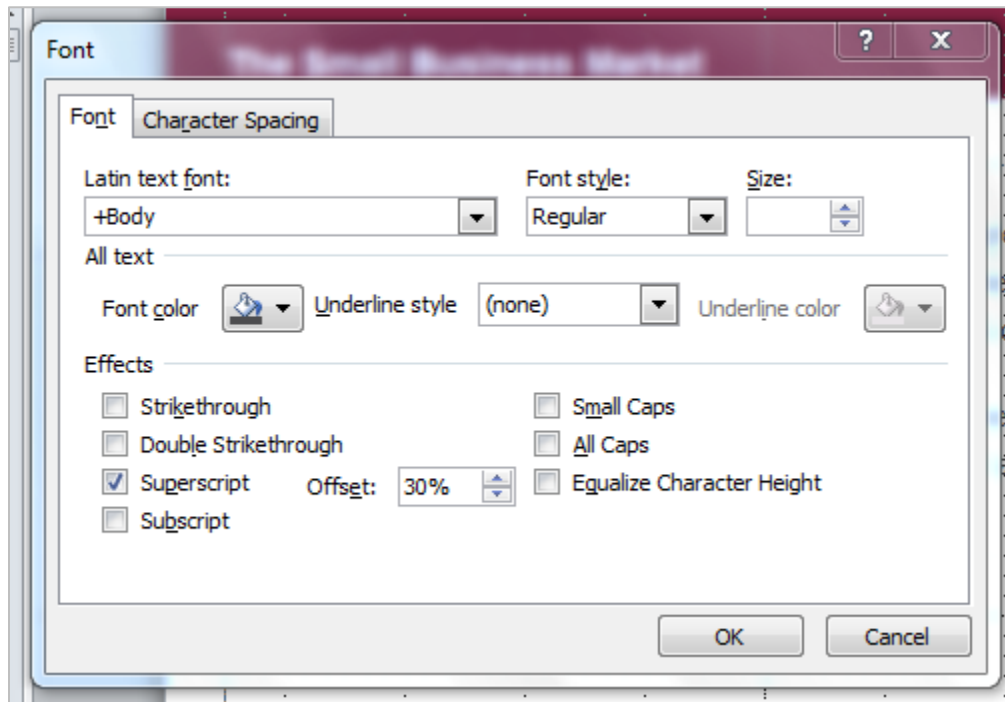


Figure 31

## h) I'm Having Issues with my Tables

▼Often times the fonts in tables change to unwanted sizes, solve this dilemma by highlighting the text and selecting the correct font size

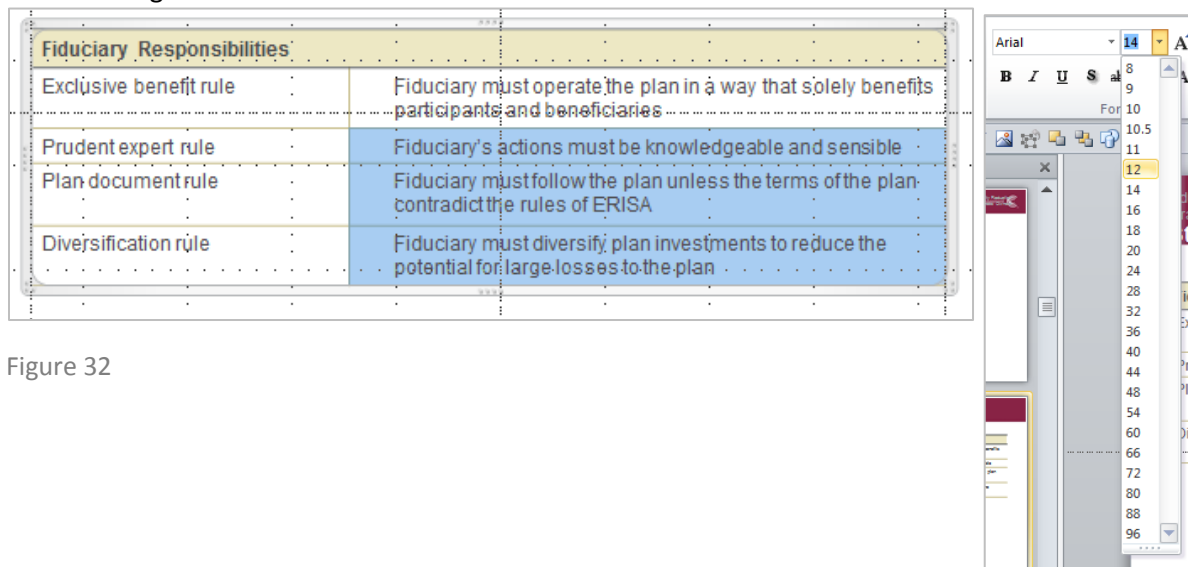


Figure 32

Figure 33

▼ A table's color can be changed by selecting a section and choosing a new color in the **Shape Fill** button

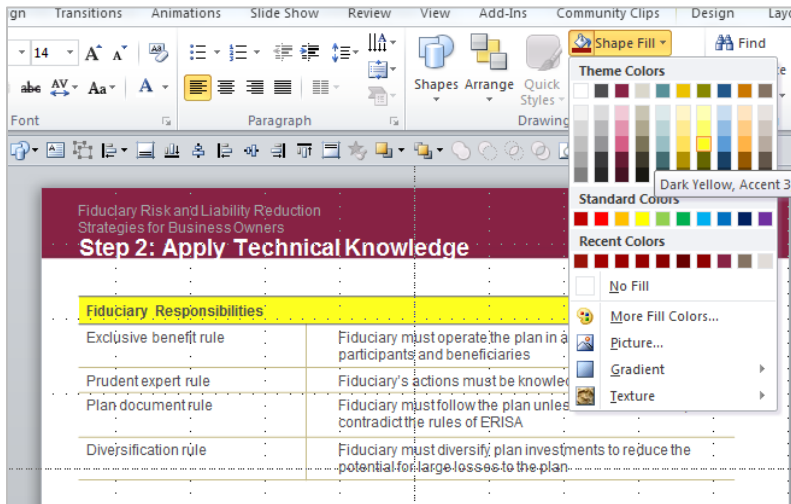


Figure 34

▼ The table's borders can also be adjusted in both width and color under the **Design** tab after selecting the chart (More table design options are available when tables are created in PowerPoint 2007/2010 vs. importing them from 2003)

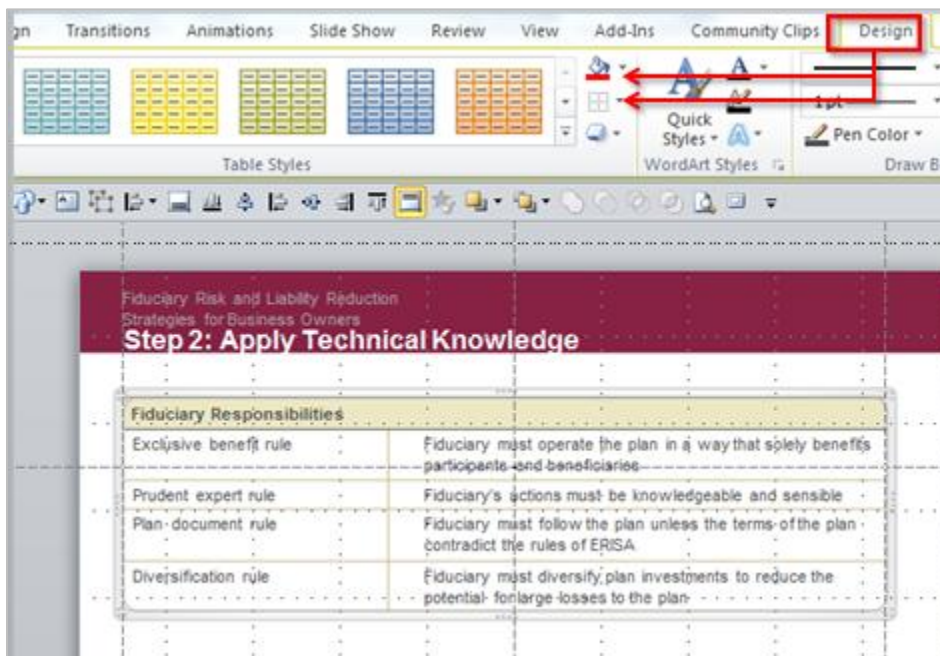


Figure 35

▼ For more color options select **More Fill Colors** under the **Shape Fill** or **Shape Outline** menus. You can type in the actual RGB proportions under the **Custom** tab

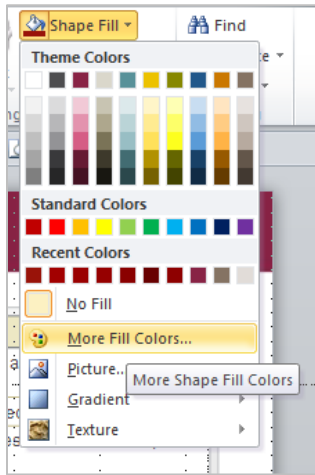


Figure 36

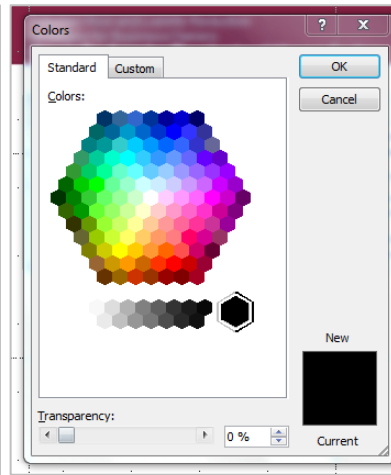


Figure 37

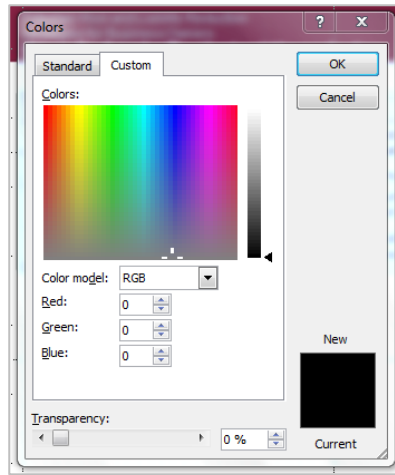


Figure 38