

Microsoft Office System Tip Sheet

**Tips
& Tricks**
Get quick Office tips.

Experience the 2007 Microsoft Office System

The 2007 Microsoft Office system includes programs, servers, services, and solutions designed to work together to help you succeed. New features in the 2007 release enhance how employees can work with one another, partners, and customers, and how organizations capture and use information. Updated packaging options allow you to have more flexibility than ever before to adopt the specific technologies and solutions that best meet your business and personal needs. Learn more about the 2007 Microsoft Office System at <http://office.microsoft.com>

Tips & Tricks

Deliver Better Results Faster

Creating Professional Documents Effortlessly by Using Office Word 2007

- **Command Tabs** – The traditional menus and toolbars have been replaced by a set of Command Tabs located in what is called the Ribbon. Presented graphically, Command Tabs display the commands that are most relevant for each of the task areas in the application. For example, Office Word 2007 has Command Tabs for writing, inserting, viewing, and other tasks. You can double-click a Command Tab to hide or reveal the Ribbon as needed. Of course, the traditional dialog box interfaces are still available for those who want a greater degree of control over the result of the operation.
- **Galleries and Live Preview** – You can click a Gallery on the Command Tabs to see a Live Preview of an editing or formatting change *before* that change is actually applied.
- **The File Button** – The File button has replaced the File menu and contains many of the standard file-related commands.
- **The Mini Toolbar** – When working in the content of a document, you can use the common formatting items in the Mini Toolbar to limit use of the Command Tabs.
- **Contextual Command Tabs (Tables)** – Certain sets of commands are relevant only when objects of a particular type are being edited. For example, the commands for editing a table in Office Word 2007 are not relevant until a table exists in a document and the user is focusing on modifying it. Office 2007 features Contextual Command Tabs that appear only when they are needed and remain out of the way when they are not. Click the Table group on the Insert tab. Click the table to see the Table Tools contextual command tab.
- **Quick Styles** – By using the Quick Styles feature, you can change how entire documents look with a single click. You can modify fonts, colors, margins, table formatting, and other elements by simply choosing a different Quick Style. You can also create your own custom Quick Styles. Click the Styles group on the Home command tab.

Microsoft Office System Tip Sheet

- **Global Document Changes** – Global document changes are also easier to make in Office 2007. For example, you can use the Margins Gallery to visualize and apply margin changes with one click. Document themes provide the foundation for the overall look of your document. The theme specifies the major and minor fonts used in the document, the color palette for the document, and the effects used for shapes, charts, and diagrams inserted into the document. Click the Page Setup command tab for global document options.
- **Building Blocks** – Applying document building blocks such as headers and footers is also done with a click. Relevant options for customizing these components are revealed via the Contextual Command Tab only when needed. Click the Header & Footer group on the Insert command tab.

Analyzing Information by Using Office Excel 2007

- **Command Tabs** – Office Excel 2007 has a unique set of Command Tabs useful for spreadsheet work such as creating worksheets, working with formulas, managing data, and other tasks.
- **Spreadsheet Capacity** – Office Excel 2007 delivers greater spreadsheet capacity—1 million rows by 16,000 columns—to facilitate working with tremendous amounts of data. You no longer have to use many different spreadsheets to support your data.
- **Page Layout View** – You can also use the new Page Layout View to work with your spreadsheets as they will appear on the printed page. On the View tab, in the Workbook Views group, click Page Layout View.
- **Excel Tables** – Enhancements in Office Excel 2007 help you assemble data into a table with just a few clicks. Simply choose Format as Table in the Styles group on the Home command tab and Office Excel 2007 automatically labels column headings, creates AutoFilters, and displays other relevant tools. When you need to expand the table to accommodate more data, Office Excel 2007 quickly expands the table using the proper format.
- **Formulas** – New formula enhancements enable you to build formulas based on column headers instead of cryptic cell names. Formulas can be automatically copied down the entire column.
- **Conditional Formatting** – You can apply conditional formatting more easily and identify trends by using colored gradients, data bars, and icons. In the Style group on the Table Tools command tab, click Conditional Formatting.

Using Charts to Communicate Information

- **Office 2007 Charting Engine** – With accessible charting tools available from the newly redesigned interface of the Microsoft Office system, you can create professional-looking charts with just a few clicks. Use the Chart Tools Contextual Command Tab to format axes, titles, and other chart labels or add visual enhancements such as 3-D, shadows, and glow. Click the Charts group on the Insert command tab.

Microsoft Office System Tip Sheet

Creating Dynamic Presentations

- **Command Tabs** – Office PowerPoint 2007 has a unique set of Command Tabs useful for presentation tasks, including designing slides, working with animations, and customizing the slideshow experience.
- **Diagrams** – New graphical capabilities help you easily create diagrams from scratch or change an already determined set of bullet points into an appealing and effective diagram. These new diagramming capabilities are complemented by updated effects, presented in contextual menus as you work with the diagram. All the diagrams are dynamic and can be adapted to your needs, so you are not confined to static and unmanageable graphics. Right-click the desired bullet and select Convert to SmartArt. Use the SmartArt contextual command tabs to customize the diagram.
- **Themes** – PowerPoint themes simplify the process of creating presentations. Simply select the theme you want, and Office PowerPoint 2007 does the rest. With one click, the background, text, graphics, charts, and tables all change to reflect the theme you have selected, helping to ensure that all elements in your presentation complement one another. Click the Themes group on the Design command tab.

Managing E-Mail, Notes, and Tasks

- **Command Tabs** – Opening an e-mail message or other Outlook item reveals the now familiar Ribbon and selection of Outlook-specific Command Tabs.
- **Instant Search** – With new and powerful integrated Instant Search, you can quickly locate the information you need, whether it is in your e-mail, calendar, contacts, or tasks. Type in a keyword, and Instant Search quickly searches your Office Outlook 2007 data, highlighting the locations where that search term appears. Instant Search even searches for keywords within e-mail attachments. You also have the flexibility to create queries with different criteria, such as date, sender, color categories, and mail importance, and Instant Search finds and delivers the results.
- **Attachment Previewer** – With the new Attachment Previewer, you can view your attachments with one click directly from within the reading pane. Click Preview File in the preview pane.
- **Color Categories** – New color categories give you a quick, visual way to customize and distinguish items from one another, making it easy to locate information. You can add the same color category to mail, calendar, or task items so that you can easily locate all items from a project at a glance. When you need to find the information later, you can search and sort by color categories to quickly identify what you are looking for. On the Message tab, in the Options group, click Categorize, and then select a Category.
- **To-Do Bar** – The new To-Do Bar integrates your tasks, e-mail messages flagged for follow-up, upcoming appointments, and calendar information in one convenient place. It also includes tasks from the Office OneNote 2007 note-taking program, Microsoft Office Project 2007, and Microsoft Windows SharePoint Services Web sites.

Microsoft Office System Tip Sheet

**Tips
& Tricks**
Get quick Office tips.

- **Flagging Mail as Tasks** – With the Flagging Mail as Tasks feature, you can create a task from an e-mail message in one simple step. Simply right-click to flag your message and designate a date for completion. The item is then added to your To-Do Bar and the due dates are integrated automatically into your calendar.
- **Daily Task List** – Office Outlook 2007 integrates tasks on the calendar in the Daily Task List so that you see them displayed beneath your daily appointments and meetings. To allot time for working on a task, you simply drag the task onto your calendar.
- **OneNote** – You can link items in your Office Outlook 2007 calendar to meeting notes in Office OneNote 2007. You could easily access information about the meeting on your calendar by clicking through the Office OneNote 2007 interface—or quickly access the information in Office OneNote 2007 by clicking a link in your calendar. Select a Calendar item and click Notes About This Item in the toolbar.

Simplify Working Together

Sharing Your Work Confidently

- **Prepare Files for Sharing** – Before sharing a document with a customer, co-worker, or partner, you need to make sure you can do so confidently. Office 2007 provides several ways to prepare files for sharing, including protecting against unauthorized viewing and distribution, adding a digital signature for verification, and checking compatibility with older versions of Microsoft Office. Click the File Button, then the Finish menu.
- **Document Inspector** – Document Inspector removes personally identifiable information, comments, and tracked changes from documents. It can also search for and remove hidden text and other types of information. Click the File Button, then the Finish menu.
- **Save as PDF** – Office 2007 supports saving your document as a Portable Document Format (PDF) or XML Paper Specification (XPS) file. Now you can post your documents on the Internet or share them with others, knowing that other users can view them regardless of the type of computer or applications they are using. Click the File Button, then the Save As menu.
- **Mark as Final** – Marking a document as Final makes the document read-only. Notice that all formatting tools are now disabled, which prevents unauthorized editing of the document. Click the File Button, then the Finish menu.
- **Share Your Files** – When the document is ready, use the Send and Publish menus to share it with others. You can send the file via e-mail, fax it with an Internet fax service, or save it to a document management server. If you are making the document available for collaboration purposes, create a document workspace to store the document in a central online location. Document workspaces are made possible through integration with Windows SharePoint Services, a feature of Windows Server 2003. You can use Office SharePoint Server 2007 to further extend these capabilities.

Microsoft Office System Tip Sheet

**Tips
& Tricks**
Get quick Office tips.

After a document workspace is created, you can use it to communicate with project participants and control document editing through a check-in/check-out procedure. Click the File Button, then the Share menu.

Sharing and Reusing Presentations

- **SharePoint Slide Libraries** – You can use new SharePoint Slide Libraries to give you one centralized storage area for all your personal or team presentations. For example, if you or your teammates have created a presentation and you need to use one or two existing slides, it is easy to insert this content into your presentation without ever leaving Office PowerPoint 2007. You can also choose to link slides in your presentation to the server version. If the server version changes, you are automatically prompted to update your slides. When finished, you can publish your new presentation to a Slide Library directly from Office PowerPoint 2007. Now other people can repurpose your content for their own work. On the Slides tab, in the Slides group, in the Add Slide list, click Reuse Slides. In the Reuse Slides pane, click Open a Slide Library.

Connecting to Information by Using Offline Document Libraries and Office Groove 2007

- **Offline Document Libraries** – You can keep synchronized copies of Office SharePoint Server 2007 document libraries and lists within your Outlook folders, making it easy to organize and browse documents in these folders, just as you would any mail. You can work on these documents within their respective applications in Office Outlook 2007 at any time, even when you are offline. When you are back online, you can easily synchronize your changes with the server version. From a shared document library, click Actions on the Shared Documents toolbar, then click Connect to Outlook.
- **Groove Workspaces** – Office Groove 2007 is a collaborative environment that enables teams to work together more effectively, regardless of network boundaries. Teams using Office Groove 2007 work together in collaborative workspaces that place all team members, communications, tools, and information in one convenient location accessible from each member's computer. Each time you make a change—such as updating a file, responding to a discussion, or posting some text in the workspace chat area—Office Groove 2007 updates your change (and only that change) for all the members of your workspace. If you are not online when you make the change, Office Groove 2007 publishes it the next time you connect. If your team members are not connected, they will see the change the next time they connect.
- **Groove Launchbar** – The first thing you see when you start Office Groove 2007 is the Groove Launchbar. This easy-to-use tool helps you manage and organize all your Groove activities, including creating new workspaces, inviting others to workspaces, sending messages, monitoring workspace and contact activity, and setting your personal Groove preferences.

Microsoft Office System Tip Sheet

**Tips
& Tricks**
Get quick Office tips.

- **Groove Files Tool** – You can use the Files tool to work collaboratively with your teammates on almost any type of computer file. Everybody in your workspace has access to those folders and files.
- **Groove Discussion Tool** – The Groove Discussion tool helps teams engage in a detailed exchange of ideas in context of the work they are doing in the workspace.
- **SharePoint Files Tool** – The SharePoint Files tool offers all the capabilities of the Groove Files tool with the added benefit of integration with SharePoint document libraries. You can easily check out documents from a document library into your Groove workspace, collaborate on and iterate those documents among your project team, and then publish them back to the document library when you have finished. You can access and update the information in your workspaces whether you are connected to the network or not.

Streamline Processes and Content

Importing Forms by Using the Form Import Wizard in Office InfoPath 2007

- **Import Form Wizard** – The Import Form Wizard in Office InfoPath 2007 makes it easy to convert Word documents and Excel workbooks into forms and to build structure into your information-gathering processes. Click File→Design a Form, then click Import.
- **Design Checker** – The Office InfoPath 2007 Design Checker examines the conversion, identifying each field and table in the form. If the wizard discovers an ambiguous or unsupported element in the form, it flags the element and prompts you to insert a proper control as a replacement. The Design Checker can also be used to check browser compatibility for your form. Click View→Task Pane, then Design Checker.
- **Deploying Forms** – With the InfoPath Forms Services capabilities of Office SharePoint Server 2007, you can deploy your compatible business forms beyond the corporate firewall as browser-based forms that do not require a local installation of InfoPath. You can also deploy forms to Office Outlook 2007 and SharePoint Form libraries. Click the File button, and then click Publish.

Configuring a Document Approval Workflow

- **Create Workflow Template** – With Office SharePoint Server 2007, you can take advantage of workflows to automate and gain more visibility into common business activities such as document review and approval, issue tracking, and signature collection. You can create a workflow template for any document in a Document Library. In the Details pane, click Settings, and then click Document Library Settings. Under the Permissions and Policies heading, click Workflow settings.
- **Start a Workflow** – To start the workflow, in the drop-down list for the document, click Workflows. Select the desired workflow, and then click Start.

Microsoft Office System Tip Sheet

**Tips
& Tricks**
Get quick Office tips.

- **Participate in a Workflow** – Integration with familiar client applications such as Office Outlook 2007 simplifies the user experience. For example, you can be notified of the workflow in progress via e-mail. Click Edit this Task to open the approval dialog box. From here, you can open the workflow document, then approve or reject it, adding your comments if necessary.
- **Track a Workflow** – You can track the workflow progress and view the completion information in the Shared Document Library.

Configuring Information Management Policies

- **Define a Policy** – Records management capabilities in Office SharePoint Server 2007 give records managers the ability to set up a records repository according to the organization's file plan. In a document library, click Settings, and then click Document Library Settings. In the Permissions and Policies section, click Information Management Policy Settings. In the Specify the Policy section, click Define a policy, and then click OK.
- **Auditing Policies** – Auditing policies can be turned on to log all activity against a record library, and administrators have the ability to see reports on the usage. In the Auditing section, click Enable Auditing.
- **Expiration Policies** – The system also provides the ability to specify an action when the expiration date is reached. The action either disposes the record or starts a workflow that can allow the records manager to take action such as moving this record to a long-term archive. In the Expiration section, click Enable Expiration.