

### GET THE SCOOP ON...

- Quick ways to create new documents ■ Get easy access to professionally designed document templates ■
- Customize Office to make saving documents easier and faster ■ Publish documents on the Web or use the universal PDF or XPS formats

## Working with Office Documents

**W**orking with Office documents seems like a fairly straightforward affair: You create a new document, edit it, save it, close it when you no longer need it, and then open it later when you need it once again. In the official Office world, that is indeed all there is to document management. However, in the unofficial world that you will be inhabiting throughout this book, many powerful and useful document management techniques exist that you can take advantage of to work faster and more efficiently.

In Word, for example, the standard method for working with a new document is to create a blank document based on the Normal template and then add your text, formatting, and images. However, did you know that Microsoft offers well over 1,000 templates at the Office Online site? These templates cover everything from letters, memos, and fax cover sheets to brochures, flyers, and newsletters, and their professional design not only saves you time, but makes *you* look professional, as well.

This chapter introduces you to templates and to many other techniques for managing your Office documents, from creating them to saving them to publishing them on the Web.

# Chapter 1



### Inside Scoop

The new interfaces for Word, Excel, and PowerPoint do not have a traditional menu system. In particular, Microsoft has replaced the old File menu item with the Office button in the top left corner of each program. So in this book when

I tell you something like “Choose Office ⇨ New,” I mean that you should click the Office button and then click New.

## Creating a new document

In most of the Office programs, a new document is created for you automatically when you launch the program. However, you can also generate a new document at any time by using either of the following techniques:

- Choose Office ⇨ New, and then click Blank *type*, where *type* depends on the program. For example, in Word you click Blank Document, in Excel you click Blank Workbook, and in PowerPoint you click Blank Presentation.
- Press Ctrl+N.

## Creating a new document outside of the program

You can also create a new document even if the associated program isn't open. Instead, you use the Windows shell to create the document. This technique is useful if you are working in Windows Explorer and realize that you want to create a new document within the current folder. Here is how you do so:

1. Choose Office ⇨ New. (Alternatively, right-click an empty part of the folder and then click New.)
2. In the list of file types that appears, click one of the following:
  - **Microsoft Office Access Database.** Creates a blank Access database.
  - **Microsoft Office Word Document.** Creates a blank Word 2007 document.
  - **Microsoft Office PowerPoint Presentation.** Creates a blank PowerPoint presentation.
  - **Microsoft Office Publisher Document.** Creates a blank Publisher document.
  - **Microsoft Excel Worksheet.** Creates a blank Excel workbook.

3. Type a new name for the document (be sure not to delete the file extension).
4. Press Enter. Double-click the new document to open it in its associated application.

## Creating a custom shell presentation

When you create a new PowerPoint presentation using the Windows shell, as you learned in the previous section, Windows creates the new document using a blank PowerPoint file named PWRPNT12.PPTX, which is located in ShellNew, a subfolder of the main Windows folder (usually C:\Windows). The PWRPNT12.PPTX file just creates a blank presentation. However, you can create a customized version of PWRPNT12.PPTX that uses a particular theme or includes one or more slides that you always include in your presentations, which can save you lots of time when you start presentations. Follow these steps:

1. Use Windows Explorer to open the C:\Windows\ShellNew folder.
2. Right-click PWRPNT12.PPTX and then click Open. Windows launches PowerPoint and loads the template.
3. Customize the presentation file as required.
4. Save the template file.

Now when you choose Office ⇒ New and click Microsoft Office PowerPoint Presentation, the new file includes the changes you made to the PWRPNT12.PPTX template.

Note that you can also apply this technique to new Excel and Publisher documents:

- For Excel, open the ShellNew folder and customize the EXCEL12.XLSX file.
- For Publisher, open the ShellNew folder and customize the MSPUB.PUB file.

## Creating a new document based on an existing document

When you work in Microsoft Office, one of the best ways to save time and increase your efficiency is to, as the saying goes, avoid reinventing the wheel. This means, in this case, that if you need to create a document

that is very similar to an existing document, do not build the new document from scratch. Instead, use the existing document as a starting point and modify it as needed for the new file.

Of course this method is only useful if you preserve the original document. Here are four methods you can use to base a new document on an existing document while also preserving the original:

- Open the original document and then choose Office ⇒ Save As. In the Save As dialog box that appears, type a new filename. You can also optionally click a different location and click a different file type. When you are done, click Save.
- In the application, choose Office ⇒ New to display the New Document dialog box. Click New from existing to open the New from Existing Document dialog box. Click the original file you want to use and then click Create New.
- In the application, choose Office ⇒ Open to display the Open dialog box. Click the original file you want to use and then pull down the Open button's list and click Open as Copy.
- Use Windows Explorer to open the folder that contains the original document. Click the document and then choose Edit ⇒ Copy (or press Ctrl+C). Open the folder in which you want to store the new document (this is optional) and then choose Edit ⇒ Paste (or press Ctrl+V).

## Taking advantage of templates

Another secret to success in the business world is to let the experts do whatever it is they are good at. Let the salespeople sell, the copywriters write, and the designers design. If you try to do these things yourself, chances are that it will take you longer and the results will not be as good.

You can apply the same idea to the Office world, as well. Why spend endless hours tweaking the design and layout of, say, a brochure when a wide variety of professionally designed brochures is just a few mouse clicks away? I am talking here about using *templates*, special documents that come with predefined layouts, color schemes, graphics, and text. Microsoft Office Online has well over 1,000 templates that you can use,

divided into more than 20 different categories such as Brochures, Business Cards, Flyers, Letters and Letterhead, Memos and Fax Covers, and Newsletters. And that's just for Word. Hundreds of other templates are also available for Excel, PowerPoint, Publisher, and other Office programs. All of them were created by professional designers and most are quite striking. Of course, once you have created a document based on one of these templates, you are free to tweak the layout, design, and text to suit your needs.

In previous versions of Office, the Office Online templates were not featured in any way and you had to jump through quite a few hoops to use them. You had to click a link or a button to open the Office Online site in your Web browser, find the template you want, download it, and then start a new document based on the downloaded file. Just creating the document from scratch almost seemed easier.

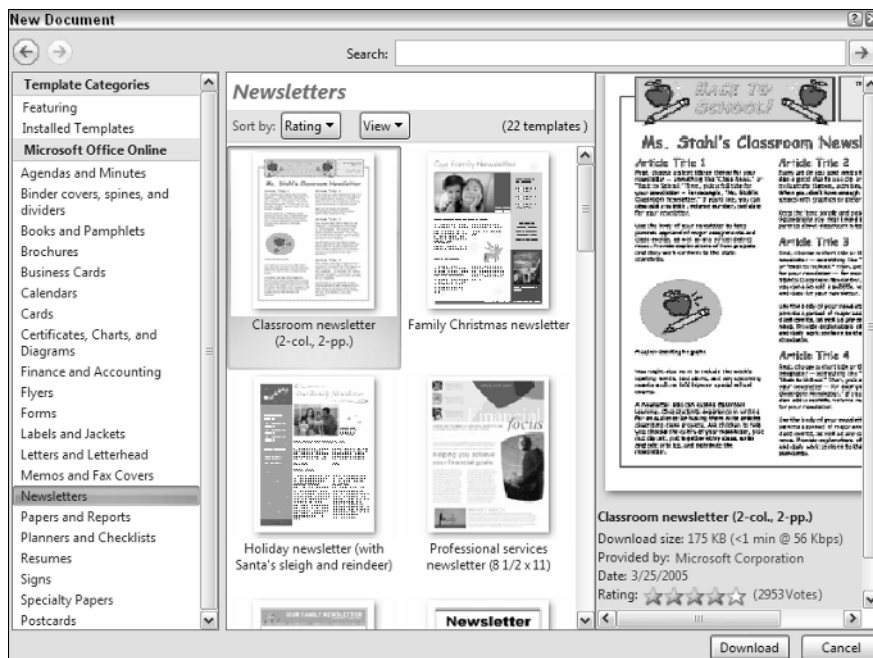
That has all changed in Office 2007 because Word, Excel, and PowerPoint now make it extremely easy to find and use the Office Online templates. Once you are connected to the Internet, follow these steps:

1. Choose Office ⇨ New to display the New Document dialog box.
2. Click the template category you want to use.
3. Click the template subcategory you want to use (if one exists).
4. Click the template. The right side of the New Document window shows a larger version of the template, the download size and time, and the template rating (generated by visitors to the Office Online site), as shown in Figure 1.1.
5. Click Download. The program downloads the template and then creates a new document based on the template.
6. If you see a Security Alert, click Enable Content, click Trust all documents from this publisher, and then click OK.



### Inside Scoop

After you download a template, you can reuse it easily by choosing Office ⇨ New, clicking the template in the Recently Used Templates list, and then clicking Create.



**Figure 1.1.** Click an Office Online template to see a larger version and its rating.

## Saving a document

Experienced computer users know that saving your work too often is just not possible. A power failure, lightning strike, program hang, or Windows crash can occur at any time, and the result is often the inadvertent and sudden shutdown of the program and whatever document or documents you were working on. If you have not saved your work for a while, you will lose some or all of those changes.

To minimize the amount of work lost if your document shuts down without warning (and therefore minimize the amount of time you have to spend redoing that work), you can do two things:

- Get into the habit of saving frequently, at least every few minutes. Some people save every time they pause in their work. To make this task easier, take advantage of the Save button in the Quick Access toolbar or use the Save command's shortcut key combination: Ctrl+S. With practice you can easily press these keys using just two fingers on your left hand (such as the pinky and middle finger).

Alternatively, you can automate the saving of a document using a VBA macro, as explained in Appendix B.

- Use the AutoRecover feature available in most Office 2007 programs. AutoRecover tracks changes made to a document, and in the event of a program crash enables you to recover files that had unsaved changes.

## Rules for naming Office documents

When you save a new document for the first time, the Save As dialog box includes a File name text box that you can use to type a name for the document. In general, you should supply each document with a name that is long enough to accurately describe the document, but not so long that the name gets truncated when you view it in Windows Explorer or in the Open dialog box.

Besides this general file-naming guideline, here are a few more rules that you must follow when naming your documents:

- The complete pathname for any document must not exceed 255 characters. The pathname includes not only the filename, but also the location of the document, including the drive letter, colon, folder name (or names), and backslashes.
- The filename can include any alphanumeric character, one or more spaces, and any of the following characters: ~ ` @ # \$ % ^ & ( ) \_ - + = { } [ ] ; , . ‘
- The filename can also include non-keyboard characters such as an em dash (—) and the trademark symbol (™). To type such symbols, hold down Alt and then use your keyboard's numeric keypad to type 0 followed by the symbol's three-digit ANSI code. Table 1.1 lists a few common symbols and the key combinations that you press to generate them.
- The filename must not include any of the following characters: \* | \ : “ < > ?
- Do not delete the file extension, such as .doc or .docx for Word documents, and .xls or .xlsx for Excel workbooks. Windows uses the file extension to associate a document with its application, so deleting an extension breaks that association.

**Table 1.1.** Key combinations for some common symbols

Symbol	Description	Key Combination
€	Euro	Alt+0128
™	Trademark	Alt+0153
¢	Cents	Alt+0162
£	Pound	Alt+0163
¥	Yen	Alt+0165
©	Copyright	Alt+0169
®	Registered trademark	Alt+0174
$f \frac{1}{4}$	One quarter	Alt+0188
$f \frac{1}{2}$	One half	Alt+0189
$f \frac{3}{4}$	Three quarters	Alt+0190

## Shortening the AutoRecover interval

AutoRecover is one of those great tools that you hope you never have to use. If AutoRecover has a downside, it is that the default interval for saving the recovery data is every 10 minutes. That might sound quite short, but when you are on a roll you can get quite a bit of work done in 10 minutes. To help AutoRecover recover even more of your work, follow these steps to shorten the interval:

1. Choose Office ⇒ *Application* Options, where *Application* is the name of the program you are using. The Options dialog box appears. (In Office applications that have a menu bar, choose Tools ⇒ Options, instead.)
2. Click Save. (In some applications you click the Save tab instead.)
3. Make sure the Save AutoRecover info every X minutes check box is activated, and reduce the number of minutes to the value you want to use.
4. Click OK.



**Watch Out!**

For small documents, the shorter the AutoRecover interval the better. However, for large documents, saving the AutoRecover data can take the program a noticeable amount of time, so a very short interval can slow you down. Try a 4- or 5-minute interval as a compromise.

## Specifying a default save location

When you save a new document for the first time, or when you click the Save As command, the Save As dialog box appears. You use this dialog box to provide a name for the new file and to select a location in which to store it. Most of the document-based Office applications (including Word, Excel, PowerPoint, Access, Visio, Project, and OneNote) have a default folder that appears when you first display the Save As dialog box (or the Open dialog box). This default folder is usually either the My Documents folder defined in your Windows user profile, or a subfolder of My Documents—such as My Shapes, for Visio. (In Windows Vista, the default folder is usually the Documents folder within your user profile.)

Although not having your documents scattered all over your hard disk is good file management practice, putting *every* document in a single folder is just as bad. Ideally, you should create subfolders in My Documents (or Documents, in Windows Vista) for different file types (workbooks, presentations, databases, and so on), different projects, different departments, and so on.

After you set up this organizing system, however, you will probably find that saving (and opening) documents takes you a little extra time because you have to navigate from the program's default folder to the subfolder you prefer. Instead of performing these extra steps every time, you can make saving and opening more efficient by changing the program's default folder. Here are the steps to follow:

1. Choose Office ⇒ *Application* Options, where *Application* is the name of the program you are using. The Options dialog box appears. (In Office applications that have a menu bar, choose Tools ⇒ Options instead.)
2. Click Save. (In some applications you click the Save tab instead.)
3. Type the new folder path in the Default file location text box.
4. Click OK.

## Customizing the Places bar for quick folder access

The left side of the Save As and Open dialog boxes includes icons for several common locations: My Recent Documents, Desktop, My Documents, My Computer, and My Network Places. The area that contains these icons is called the Places bar.

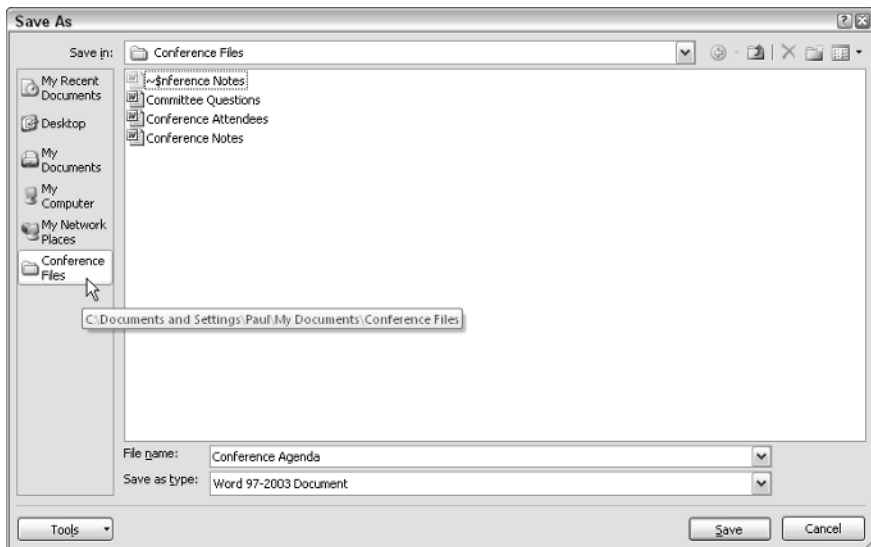
If you have two or more folders that you use regularly (for example, you might have several folders for various projects that you have on the go), switching between them can be a hassle. To make this chore easier, you can customize the Places bar to include icons for each of these folders. That way, no matter which location you have displayed in the Save As or Open dialog box, you can switch to one of these regular folders with a single click of the mouse.

Follow these steps to add a folder to the Places bar:

1. Display the Save As or Open dialog box.
2. Navigate to the folder you want to add to the Places bar.
3. Right-click an empty section of the Places bar.
4. Click Add *Folder*, where *Folder* is the name of the current folder.

Office adds the folder to the Places bar.

Figure 1.2 shows the Conference Files folder added to the Places bar.



**Figure 1.2.** You can get one-click access to any folder by adding that folder to the Places bar.

To manage a folder icon you have added to the Places bar, right-click the folder icon and then click one of the following commands:

- **Move Up.** Choose this command to move the folder icon higher in the Places bar.
- **Move Down.** Choose this command to move the folder icon lower in the Places bar.
- **Rename.** Choose this command to rename the folder icon.
- **Remove.** Choose this command to delete the folder icon from the Places bar.

## Saving an Excel workspace

If you are a regular Excel user, you may find that you have several workbooks that open in Excel all or most of the time. Having them open gives you easy access to the data you need, but opening all those files each time you start Excel can be a hassle. To make this task easier, you can define a *workspace* that includes those files. A workspace is a special file that acts as a pointer to a collection of workbooks. When you open the workspace file, Excel automatically opens all the files contained in the workspace.

Before you can create a workspace, you need to customize Excel's Quick Access toolbar to include the Save Workspace command. You find out the details for customizing the Quick Access toolbar in Chapter 23. For now, follow these steps to add the Save Workspace command to Excel's Quick Access toolbar:

1. In Excel, choose Office ⇒ Excel Options to display the Excel Options dialog box.
2. Click Customization.
3. In the Choose commands from drop-down list, click All Commands.
4. In the Choose commands from list, click Save Workspace.
5. Click Add.
6. Click OK.

**Bright Idea**

You do not need to restrict yourself to a single workspace file. For example, you could create a separate workspace file for each project you are currently working on. This enables you to quickly switch from one set of workbooks to another. See Appendix B for a macro that closes all open files.

Now follow these steps to create a workspace:

1. Open all the workbooks that you want to include in the workspace. (Also, be sure to close any workbooks that you do not want in the workspace.)
2. In the Quick Access toolbar, click the Save Workspace button. The Save Workspace dialog box appears.
3. Click a location for the workspace file.
4. Type a name for the workspace file (the default name is `resume.xlw`).
5. Click Save.

With that done, the next time you launch Excel, you can open all the workbooks you defined in the workspace by opening the workspace file.

Microsoft Word does not have a Save Workspace command, but it certainly could use one. However, using a VBA macro to save a collection of Word files as a workspace is possible. See Appendix B for the details.

## Embedding TrueType fonts while saving

If you use some unusual TrueType fonts in a Word document or PowerPoint presentation that you plan on sharing with other people (as described in Chapter 22), your formatting efforts will be wasted if the other users do not have those fonts installed. To solve this problem, save your work with the TrueType fonts embedded in the document, which ensures that the other users will see your document exactly as you designed it. Here are the steps to follow:

1. Choose Office ⇨ *Application* Options, where *Application* is the name of the program you are using. The Options dialog box appears.
2. Click Save.
3. In the Preserve fidelity when sharing this document/presentation list, click the document in which you want to embed the fonts.

4. Click the Embed fonts in the file check box. The application now activates check boxes:
  - **Embed only the characters used in the document.** Activate this check box to embed on the characters that actually appear in the document, which reduces the file size. If file size is not an issue, or if you think the other user might need to add new characters in the font, leave this check box deactivated to embed all characters in the font.
  - **Do not embed common system fonts.** This check box is activated by default, which makes sense since the other user's computer should have the same system fonts. If you know that is not the case, for some reason, deactivate this check box to embed the system fonts as well.
5. Click OK.

## Publishing a Document to the Web

What do you do if you have existing documents, worksheets, and presentations that you want to mount on the Web? Internet Explorer can work in conjunction with Office to display these files, but all your readers might not have that capability. To make sure anyone who surfs to your site can access your data, you need to convert your files into the Web's lingua franca: HTML. Fortunately, the Office applications make this task easy by including features that convert documents from their native format to HTML. The next few sections explain the techniques that you use in Word, Excel, PowerPoint, and Outlook.

### *Saving a Word document as a Web page*

Word does an excellent job of converting existing documents into HTML format. Character formatting (that is, those formats that are compatible with HTML) is carried out flawlessly. Bullets, numbers, and tables remain intact; graphics are preserved; and hyperlinks make the journey without a hitch. You need to watch out for your headings, but as long as you've used Word's default heading styles (Heading 1, Heading 2, and so on), they transfer correctly to HTML heading tags.

Of course, there are still a few Word knickknacks that don't survive the trip: text boxes, unusual symbols, columns, and table formulas, to

name a few. The best part is that the conversion is about as painless as these things get. Here are the steps to follow:

1. Make sure you've saved your document in Word format.
2. Choose Office ⇒ Save As. Word displays the Save As dialog box.
3. In the Save as type list, click one of the following types:
  - **Single File Web Page.** This is the MIME Encapsulation of Aggregate HTML Documents (MHTML) format. It combines the HTML and references to external files such as images into a single file that uses the .mht extension. Note that only Internet Explorer supports this file type.
  - **Web Page.** This is a regular HTML Web page that uses the .htm file extension. Word also creates a folder named *Filename\_files* (where *Filename* is the text in the File name text box) that includes any supporting files, such as images required by the Web page.
  - **Web Page, Filtered.** This is also a regular HTML Web page that uses the .htm extension. The difference is that this format also strips out any Office-specific tags that Word uses in the Web Page format to facilitate the conversion of the file back into Word format. If you don't care about converting the document back to Word, choose this format for a smaller size (less than half the Web Page format). Note, too, that this format also creates a folder to hold the page's supporting files.
4. If you want to change the page title (the text that appears in the browser's title bar), click Change Title, type the new title in the Set Page Title text box, and click OK.
5. Select a location for the new file.



### Hack

If you do not want Word to create the folder for the supporting file, choose Office ⇒ Word Options, click Advanced, and then click Web Options. In the Files tab, click Organize supporting files in a folder to deactivate it.

6. Use the File name box to type a new name for the file if necessary. If you don't, Word just changes the document's extension to .mht or .htm (depending on the file type you chose).
7. Click Save.

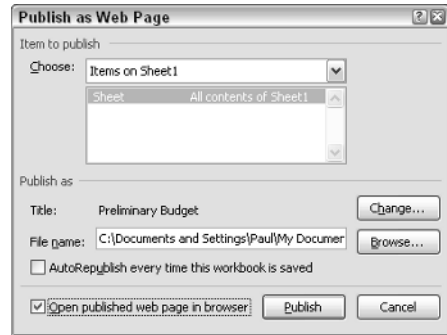
### ***Saving an Excel range, sheet, or workbook as a Web page***

Excel's row-and-column format mirrors the layout of an HTML table, so it is natural that you should be able to convert a range into the appropriate HTML table tags. Of course, you can also publish entire workbooks as Web pages.

Here are the steps to follow to publish a range or workbook to the Web:

1. Decide what you want to publish:
  - To publish an entire workbook, open the workbook.
  - To publish a worksheet, select the entire worksheet.
  - To publish a range, select the range.
  - To publish a chart, select the chart.
2. Choose Office ⇨ Save As. Excel displays the Save As dialog box.
3. In the Save as type list, click one of the following types:
  - **Single File Web Page.** This is the MIME Encapsulation of Aggregate HTML Documents (MHTML) format. It combines the HTML and references to external files such as images into a single file that uses the .mht extension. Note that only Internet Explorer supports this file type.
  - **Web Page.** This is a regular HTML Web page that uses the .htm file extension. Excel also creates a folder named *Filename\_files* (where *Filename* is the text in the File name text box) that includes any supporting files, such as images required by the Web page.
4. If you want to change the page title (the text that appears in the browser's title bar), click Change Title, type the new title in the Set Page Title text box, and click OK.
5. Click a location for the new file.

6. Use the File name box to type a new name for the file if necessary. If you don't, Excel just changes the document's extension to .mht or .htm (depending on the file type you chose).
7. Click Publish to display the Publish as Web Page dialog box, shown in Figure 1.3.
8. If the object you want to publish is not selected in the Choose box, use the drop-down list to choose what you want to publish.
9. If you want Excel to republish the object automatically, activate the AutoRepublish every time this workbook is saved check box.
10. Click Publish. Excel publishes the object to a Web page.



**Figure 1.3.** Use Excel's Publish as Web Page dialog box to set the options for saving your Excel data as a Web page.

### ***Saving a PowerPoint presentation as a Web page***

Publishing a PowerPoint presentation to the Web is becoming increasingly common. After a conference, for example, many people make their presentations available online for those who couldn't attend. Also, with business travel budgets tightening, "presenting" online saves the expense of either traveling to the audience or bringing the audience to you.

PowerPoint gives you extensive page-publishing options, as the following steps show:

1. Open the presentation you want to publish.
2. Choose Office ⇒ Save As. PowerPoint displays the Save As dialog box.
3. In the Save as type list, click one of the following types:



#### **Inside Scoop**

Excel can append new objects to existing pages. Follow the steps in this section, making sure you specify an existing Web page as the target. After you click Publish, Excel displays a dialog box asking whether you want to replace the file or add to it. Click the Add to file button to append the new object.



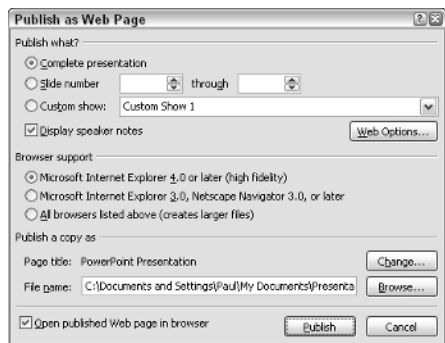
- **Single File Web Page.** This is the MIME Encapsulation of Aggregate HTML Documents (MHTML) format. It combines the HTML and references to external files such as images into a single file that uses the .mht extension. Note that only Internet Explorer supports this file type.
  - **Web Page.** This is a regular HTML Web page that uses the .htm file extension. PowerPoint also creates a folder named *Filename\_files* (where *Filename* is the text in the File name text box) that includes any supporting files, such as images required by the Web page.
4. If you want to change the page title (the text that appears in the browser's title bar), click Change Title, type the new title in the Set Page Title text box, and click OK.
  5. Click a location for the new file.
  6. Use the File name box to type a new name for the file if necessary. If you don't, PowerPoint just changes the document's extension to .mht or .htm (depending on the file type you chose).
  7. Click Publish to display the Publish as Web Page dialog box, shown in Figure 1.4.
  8. To determine how much of the presentation you publish, PowerPoint gives you three options:

- **Complete Presentation.**

Click this option to publish every slide in the presentation.

- **Slide Number *X* Through *Y*.** Click this option to publish only the range of slides you specify using the two spin boxes.

- **Custom Show.** Click this option to publish the custom slide show you select in the associated list. (PowerPoint disables this option if the presentation has no custom slide shows. To create a custom slide show, choose Slide Show ⇒ Custom Slide Show ⇒ Custom Shows.)



**Figure 1.4.** Use PowerPoint's Publish as Web Page dialog box to set the options for saving your presentation as a Web page.

9. If you also want to include your speaker notes, leave the Display speaker notes check box activated.
10. Use the options in the Browser Support group to set the target browser for your users.
11. Click Publish. PowerPoint publishes the presentation to a Web page.

### ***Saving an Outlook calendar as a Web page***

If you don't have access to an Exchange Server, or if you don't want to publish your Free/Busy information on the Web, you can still publish your Outlook Calendar as a Web page. Here are the steps to follow:

1. Click the Calendar.
2. Choose File ⇒ Save as Web Page. Outlook displays the Save as Web Page dialog box.
3. Type the Start date and End date for the time frame that you want to publish.
4. Type a Calendar title.
5. Type a File name and location for the HTML file.
6. Click Save.

### **Saving a document as an XPS file**

The global nature of our connected world means that you often need to share information with people who do not use the same technology that you do. They may not use Microsoft Office, they may run a different version of Windows, or they may be using an entirely different operating system. How do you share the information contained in a document on your system in such circumstances? Currently you have three main options:

- **Convert the document to plain text, a format supported by all systems.** This enables you to share the raw data, but you lose all of your document's fonts, formatting, and graphics, which may dilute or distort your information.
- **Put the document on the Web, enabling the other person to view it using any Web browser.** The Office programs do a good job of

converting documents to Web pages (see the previous few sections), but you do not get any rights management. The other user can easily copy the information and republish it.

■ **Publish the document as a PDF (Portable Document Format) file.**

Almost all systems have (or can get) PDF viewers, so PDF is a near-universal format. Also, the PDF document looks identical to the original, and you can apply digital rights to the PDF file to control its use. Microsoft has said that it will make available a download that enables you to save documents in the PDF format, but details were not available as this book went to press. Check out the Downloads section of [office.microsoft.com](http://office.microsoft.com).

One problem with PDF is that it is a proprietary standard (it is owned by Adobe Systems) and you may prefer to use a format based on open standards. That is the idea behind Microsoft's new document format called the XML Paper Specification, or XPS. XPS uses XML (eXtensible Markup Language) for the document syntax and ZIP for the document container file, so it's based on open and available technologies.

Microsoft is also licensing XPS royalty-free, so developers can incorporate XPS viewing and publishing features into their products without cost. Also, support for XPS is built into Windows Vista, so all Vista users can view XPS documents.

Follow these steps to save a document as an XPS file:

1. Open the document you want to convert.
2. Choose Office ⇒ Save As ⇒ XPS. The Publish as XPS dialog box appears.
3. Type a name for the XPS document in the File name text box.
4. Click an optimization option:
  - **Standard.** Choose this option if you intend to distribute the PDF document online or want to print the PDF document.
  - **Minimum size.** Choose this option if you only want to distribute the PDF document online.
5. Click Publish.

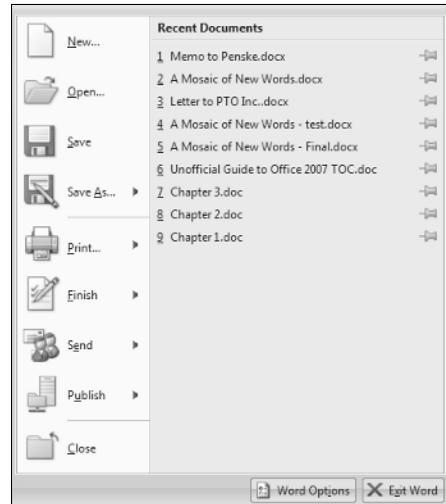
**Bright Idea**

For convenience, you may want to set up a document as a permanent part of the recent files list. To do this, click the pushpin beside the document (the pin pushes “in” to the menu).

## Opening a document

To read or work with an existing document, you must open the document within its associated application. The four main ways you can do this are as follows:

- Choose Office ⇒ Open to display the Open dialog box, locate and click the document, and then click Open.
- If you used the document recently, click File. If you see the document listed in the File menu’s Recent Files list (see Figure 1.5), click the document.
- If you used the document recently, choose Start ⇒ My Recent Documents (or, in Windows Vista, choose Start ⇒ Recent Items). If you see the document listed in the submenu, click the document.
- Use Windows Explorer to find the document and then double-click the file.



**Figure 1.5.** The File menu maintains a list of your recently used documents. If you see the document you want to open, click it.

## Removing a document from Word’s recent files list

If you have recently worked with a Word document that contains sensitive data, such as payroll details or proprietary information, you probably do not want unauthorized users viewing that data. You find out about

**Hack**

You can control the number of documents in the Recent Files list. Choose Office ⇒ Word Options, click Advanced, and then click the value you want in Number of documents on Recent Documents list. You can also use this feature in Excel, PowerPoint, and Access.

Office security in detail in Chapter 23. For now, one quick method you can use to increase security is to remove the document from the recent files list that appears in Word's File menu. Here are the steps to follow:

1. Press Ctrl+Alt+-. The mouse pointer changes to a horizontal bar.
2. Click Office to drop down the Office menu.
3. Click the document you want to remove. Word removes the document from the list.

If you think you will be removing documents from the recent files list regularly, see Appendix B for a VBA macro that automatically removes all documents from the Recent Files list.

## Previewing a document before opening it

If you have a large number of documents in a folder, remembering which file contains the information you are looking for can be difficult. Giving documents descriptive filenames can help, but you still may have times when you are not sure what is in a file.

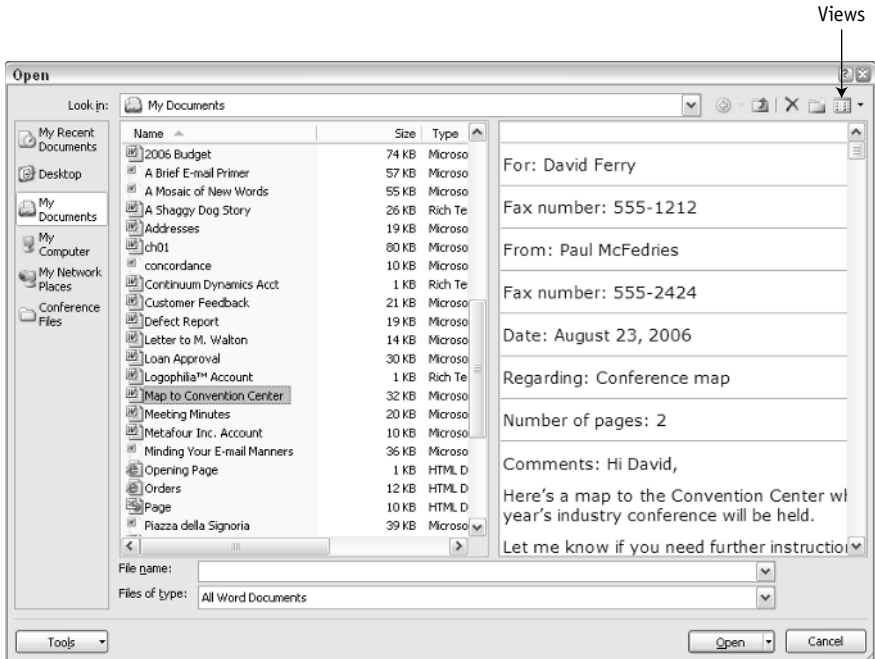
You could simply open the document to see what it contains, but you could easily end up wasting quite a bit of time trying to find the document you want. To avoid this problem, you can instead display a preview of a selected document in the Open dialog box. Follow these steps:

1. Choose Office ⇒ Open to display the Open dialog box.
2. Open the folder you want to work with.
3. Click the Views button and then click Preview. The Open dialog box displays a preview pane on the right side.
4. Click a document. The document text appears in the preview pane, as shown in Figure 1.6.
5. Repeat step 4 for any other documents you want to preview.



### Bright Idea

The size of the Open dialog box is not fixed. You can click and drag the borders to change the dialog box to the size you prefer. The program will remember the new size the next time you display the dialog box. This trick also works for the Save As dialog box.



**Figure 1.6.** Click the Views button and then Preview to add the preview pane to the Open dialog box.

## Repairing a document

If a program hangs or Windows crashes while you are working on a document, you may subsequently have trouble opening the document or, if you can open the file, you may find that it contains garbage characters. In either case, the likely cause is that the crash corrupted the document. Fortunately, you may still be able to fix the document or, at least, extract the document's text. Follow these steps:

1. In the application, choose Office ⇒ Open to display the Open dialog box.
2. Click the file you want to use.
3. Pull down the Open button's list and click Open and Repair.

## Working with document properties

Office maintains a collection of properties for each document, and these properties represent metadata—data about the document itself. The default properties include the document's title, subject, author, and, depending on the program, statistics such as the number of words and paragraphs. Each program generates the values of many of these properties automatically. For example, Word calculates all the statistics based on the document content, and the default values for the Author and Company properties are the values you entered when you installed Word. The other properties you fill in by hand.

## Editing document properties

To add or edit the properties for a document, first open the document in its associated application. Choose Office ⇒ Finish ⇒ Properties. The standard properties appear in the Properties pane, shown in Figure 1.7.

**Properties: Standard**

Author: Paul McFedries Title: Amortization Schedule Subject: Mortgage for 28 Galt Avenue Keywords: mortgage; loan; amortization

Category: Loans Status:

Comments:  
The workbook contains the raw data, payment calculations, and amortization table for the 28 Galt Avenue mortgage.

B7 = PMT(\$B\$2, \$B\$3, \$B\$4)

	A	B	C	D	E	F	G
1	<b>Mortgage Amortization Schedule</b>						
2	Interest Rate (Annual)	6.00%					
3	Amortization (Years)	30					
4	Principal	\$200,000					
5							
6	Amortization Year	Payment	Principal	Interest	Cumulative Principal	Cumulative Interest	Remaining Principal
7	1	(\$14,529.78)	(\$2,529.78)	(\$12,000.00)	(\$2,529.78)	(\$12,000.00)	\$197,470.22
8	2	(\$14,529.78)	(\$2,681.57)	(\$11,848.21)	(\$5,211.35)	(\$23,848.21)	\$194,788.65

Sheet1 Sheet2 Sheet3

**Figure 1.7.** Choose Office ⇒ Finish ⇒ Properties to display the current document's standard properties.



### Bright Idea

To change the default Author property, choose Office ⇒ *Application* Options, where *Application* is the name of the program. Click Personalize and then edit the value in the User name text box.

For a more detailed look at the document's properties, click Standard and then click Advanced to display the document's Properties dialog box, shown in Figure 1.8, which has five tabs:

- **General.** This tab shows properties such as the filename, file type, location, size, and the dates the document was created and last modified.
- **Summary.** This tab shows the standard properties plus a couple of extra properties (such as Manager).
- **Statistics.** This tab shows the document's creation date, the dates it was last modified, accessed, and printed, who last saved it, the number of times it has been saved (the revision number), and the total editing time. Word and PowerPoint documents also show statistics such as the number of pages, paragraphs, words, and characters.
- **Contents.** This tab shows a hierarchical view of the document's parts. For example, Excel shows the name of each sheet, whereas PowerPoint shows the names of the fonts used, the design template, the slide titles, and more.
- **Custom.** This tab shows the custom properties associated with the document. See the next section for more on custom properties.



**Figure 1.8.** Click Advanced to display all the properties associated with the document.



**Hack**

You can get Word, Excel, and PowerPoint to remind you to enter document properties. See Appendix B for a macro that enables you to set this up.

## Creating a custom document property

You can also create your own custom properties, and you can set these up to be filled in either automatically or manually. For example, if you are passing a document among a number of people, you may want to keep track of who last read the document. To do that, you could create a “Last Read By” property and have each user fill in his or her initials. Here are just a few other custom property ideas:

- The name of the person who edited or proofread the document
- The date the document was completed
- The department the document belongs to
- The project that the document is part of
- The current status of the document
- A telephone number to call for more information about the document

You create a custom property by following these steps:

1. Click the document and then choose Office ⇒ Finish ⇒ Properties to display the document’s Properties dialog box.
2. Pull down the Standard list and click Advanced to display the Document Properties dialog box, and then click the Custom tab.
3. Type a name for the property in the Name text box.
4. Use the Type list to click a data type for the property: Text, Date, Number, or Yes or No.
5. Type the property value in the Value text box.
6. If you want the property value generated automatically by a bookmark (in Word) or a named cell (in Excel), click the Link to content check box.

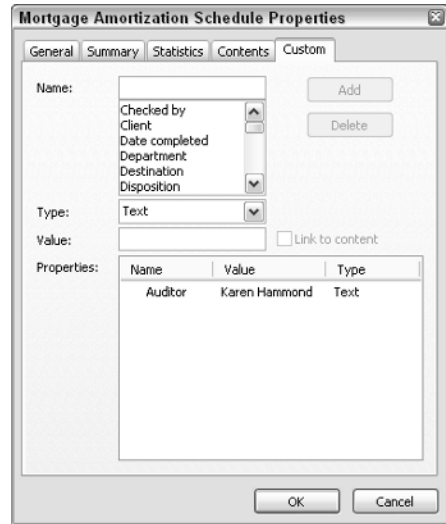
7. Specify the value of the property as follows:

- If you activated Link to content, use the Value list to click the name of the bookmark or range name you want to associate with the property.
- Otherwise, type the property value in the Value text box.

8. Click Add. Windows adds the property to the Properties list. Figure 1.9 shows an example.

9. Repeat Steps 3 through 8 to add other custom properties.

10. Click OK.



**Figure 1.9.** Use the Custom tab to add your own properties to the document.

## Just the facts

- To create a new Office document in Windows Explorer, choose Office ⇒ New and then click the file type you want to create.
- A filename can include any alphanumeric character, one or more spaces, and any of the following characters: ~ ` @ # \$ % ^ & ( ) \_ - + = { } [ ] ; , . ' . Do not use any of the following characters in your file-names: \* | \ : " < > ?
- To save a document as a Web page, choose Office ⇒ Save As, use the Save as type box to click the Web page format you want, and then click either Save or Publish.
- To preview a document before opening it, choose Office ⇒ Open, click the Views button, and then click Preview.
- To display and edit a document's standard properties, choose View ⇒ Finish ⇒ Properties.