

Part I

Getting Started

Chapter 1

Installing Microsoft Office 2007

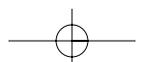
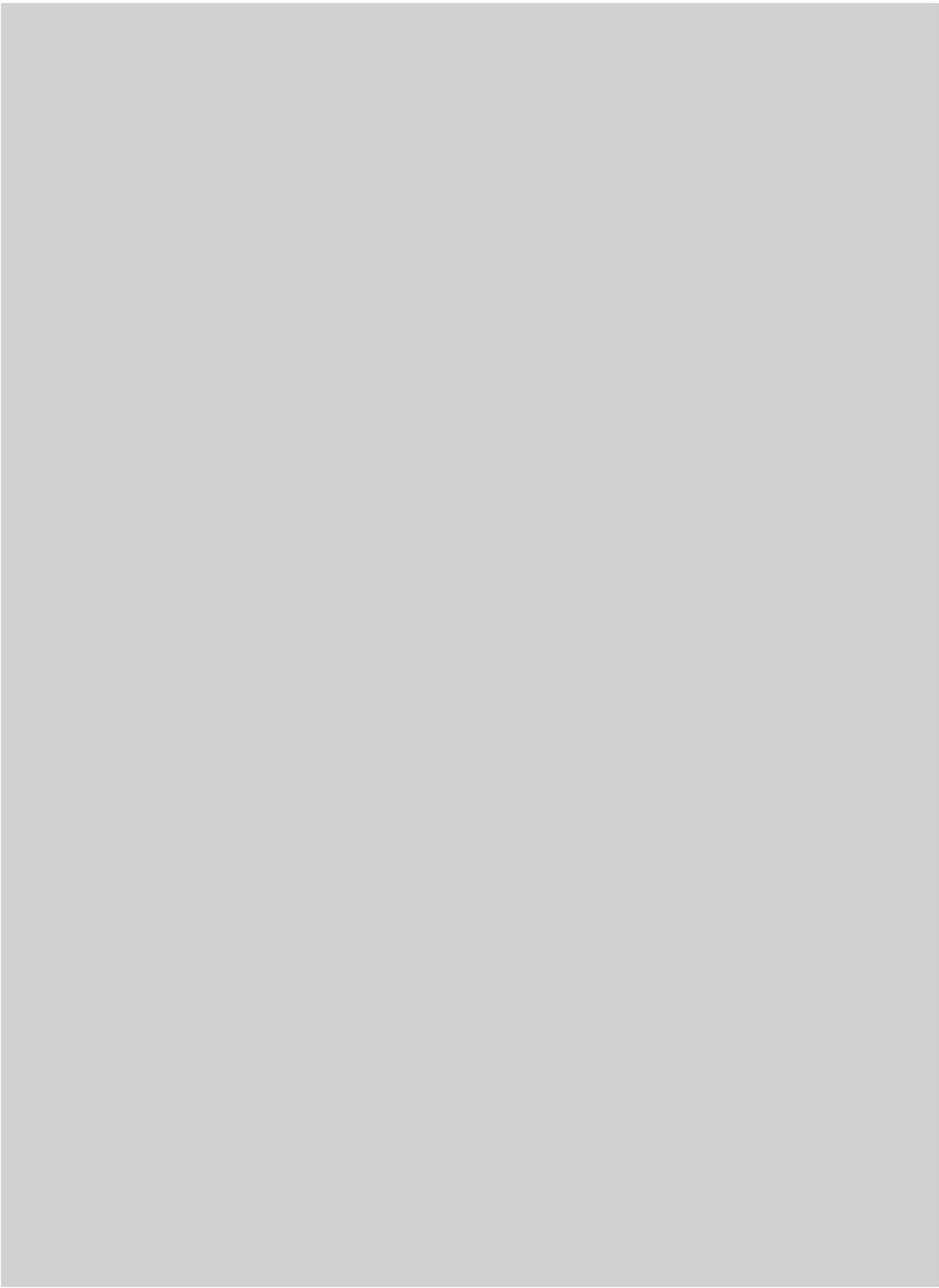
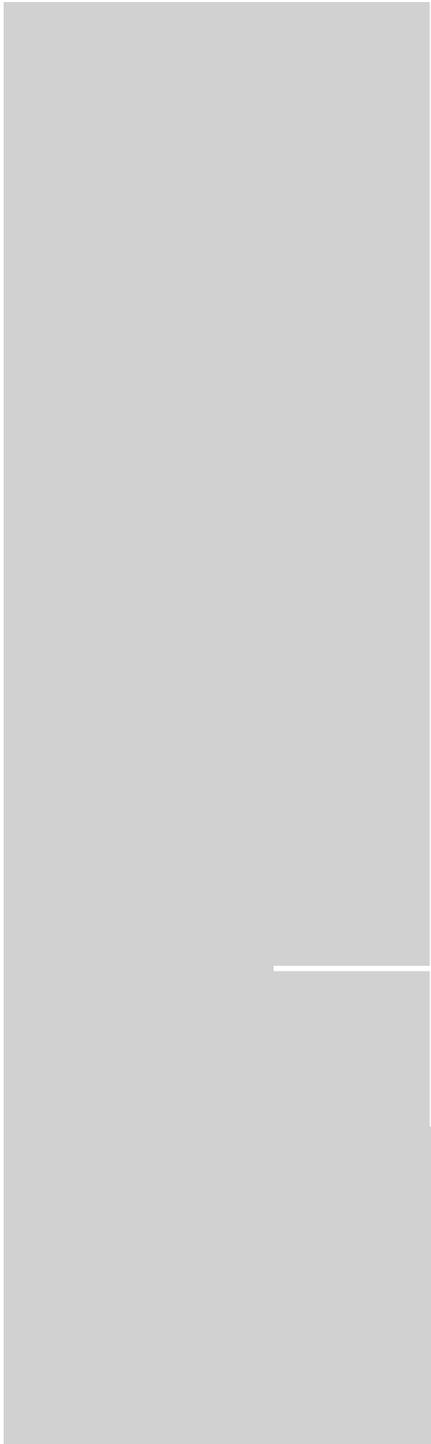
Chapter 2

Protecting Against Viruses and Other Threats

Chapter 3

Organizing Data Right from the Start

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Chapter 1

Installing Microsoft Office 2007



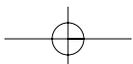
Installing Microsoft Office 2007 is generally a simple affair. You know the drill — open the package, pop in the CD, and accept the default settings by repeatedly clicking the Next button. In less time than it takes to finish a cup of coffee, you've installed a brand new office suite. That's what we cover in this chapter: how to go about preparing for and performing the installation of Microsoft Office. Before you start flipping pages to the next chapter though, understand that there's a lot more to installing Microsoft Office than just running the installation program. You need to do some important chores before and after installation, such as backing up data and selecting an installation type. You also need to understand the differences between activation and registration once installation is complete, and how each of these affects your privacy. And once Microsoft Office 2007 is installed, you need to know just what you can expect once you're up and running with it. This chapter covers all of these things and more.

Installing Microsoft Office 2007

Microsoft offers many different Office 2007 suites, each tailored to a specific class of user, but installation is the same for all of them. Although the installation process is straightforward, you do need to make some decisions beforehand. You need to decide if you want to upgrade the Microsoft Office product you have or if you want to start fresh with a new installation. If you choose the latter option, you need to decide what you want to do with the old Office program files. You need to back up your data just in case something goes wrong, and you need to make sure your computer meets the minimum requirements to support Office. Once you've done that, you can start thinking about the actual installation.

Note

All available versions of the Microsoft Office Suite are outlined in Chapter 27, "Exploring Office Enterprise," specifically, in Table 27-1.





Before Installation

Most software you install on your system takes very little preplanning. You rarely need to do anything special to install the genealogy CD you received for your birthday or the software included with a new printer. However, installing the Office suite is a bit more complex. Although most people rarely do so, and almost every installation goes perfectly, preparing for your new Office suite is certainly a best practice.

SHOULD YOU PERFORM AN UPGRADE OR A NEW INSTALLATION?

The first thing you need to decide is whether you want to upgrade your present Office suite or if you want to perform a clean installation. An upgrade builds on the suite you already have; an upgrade preserves personal settings for things like margins, AutoComplete and AutoRecover, changes you've made to the dictionary, colors, themes, and backgrounds, page layouts, and more. While this may sound enticing, an upgrade will also preserve the gunk you've created in your existing applications and may prevent you from getting the most out of Microsoft Office 2007. If you've changed where applications save files, for instance, that will be preserved in the upgrade. If you want to see Office 2007 in its pure form, it's best to perform a clean installation.

You also have the option to install a new copy of Office while keeping your older versions of the Office suite applications intact. This means you can try out the newer application, say Word 2007, and if you find you're more comfortable with the older version of Word, you still have access to it. If you have the hard drive space, this is something you may want to consider.

This particular trick works for all of the Office applications with the exception of Outlook. If you choose to install Outlook 2007, your older version of Outlook will be upgraded. You will not have access to the older Outlook once the upgrade and installation is complete.

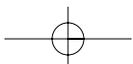
BACK UP DATA

It's always better to be safe than sorry. Perform a full backup of your data; include Word files, PowerPoint presentations, Excel spreadsheets, Access databases, Outlook data files and mail settings, and Publisher documents before going any further. You can burn these files to CDs or DVDs, copy them to a backup hard drive, or upload them to an online backup Web site. Don't forget to back up pictures and videos too.

MISCELLANEOUS SAFETY TIPS

Take some time now to clean up your computer and verify it's in good shape before installing Office 2007. Following the suggestions here will not only give you peace of mind, but will also help you get better performance from Office once it's installed.

- If installing from a laptop, plug it in to an electrical outlet first.
- Perform virus and spyware checks on your system. Remove any offending items.
- Get all Windows updates and any necessary driver updates.
- Check your hard drive for errors by running Check Disk. Click Start and then Run, and type **CHKDSK**. Click OK.
- Uninstall unnecessary programs, remove unnecessary data, and restart the computer.





- Log on as administrator and verify there are no errors.
- Close all programs before installation.

MINIMUM REQUIREMENTS

At the time this book was written, no final set of system requirements had been set. However, the following are excellent guidelines.

- **Operating System:** Microsoft Windows XP SP2 or later or Microsoft Windows Server 2003 or higher.
- **Computer and Processor:** 500-megahertz processor or higher, 256-megabyte RAM or higher, and DVD drive. For Microsoft Office Outlook 2007 with Business Contact Manager, you'll need 1 gigahertz and 512 megabytes of RAM.
- **Hard Disk:** 2 gigabytes for installation, although some of it will be freed after installation is complete.
- **Monitor:** 1024 × 768 resolution or higher is recommended, but 800 × 600 will work if needed.
- **Internet:** Broadband connection of 128 kilobits per second for download and activation of products is recommended. However, it's not required; if necessary, you can install from a DVD and activate the product by phone.
- **Outlook 2007 Users:** Microsoft Exchange Server 2000 or later is required for Outlook 2007 users. (This is somewhat misleading though, because Outlook can also be used with non-Microsoft mail servers. Still, for corporations that use Exchange this is important: if they are considering installing Office 2007, their Exchange version needs to be Exchange Server 2000 or later, or else Outlook 2007 won't work.)
- **Miscellaneous:** Internet Explorer 6.0 with service packs.

Installation Step-by-Step

The installation itself should go smoothly if you've performed all of the preinstallation tasks. Here's how it generally goes:

1. Insert the Microsoft Office 2007 DVD and wait for the installation program to begin. If it does not begin automatically, open My Computer, click the appropriate drive letter, and start the installation manually.
2. If prompted to proceed with the installation, click Yes.
3. In the Enter Product Key dialog box, type your 25-character key. This key is located on the packaging. Hyphens are added automatically. Click Continue.
4. Read and accept the Microsoft Software License Terms. Click Continue.
5. In the Installation Types page, select Upgrade or Custom.



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6. If you choose Upgrade, the installation continues and automatically installs. If you choose Custom, you'll need to perform the rest of the steps listed here.
7. In the Upgrade dialog box, configure your preferences for installation.
 - a. From the Upgrade tab, select Remove all Previous Versions, Keep all Previous Versions, or Remove Only the Following Applications. When choosing the latter, check which applications to remove.
 - b. From the Installation Options tab, click the drop-down arrow beside Microsoft Office, and select Run all from My Computer to install the entire Office suite. To keep any single application from installing at all, click the arrow next to it and choose Not Available as shown in Figure 1-1.
 - c. From the File Location tab, accept the default installation location or browse for a more suitable location.
 - d. From the User Information tab, fill in your personal information for User Name, Initials, and Organization.
8. Click Install Now.
9. When the installation is complete, click Close or click Register for Online Services. For more about Registration, continue to the next section.

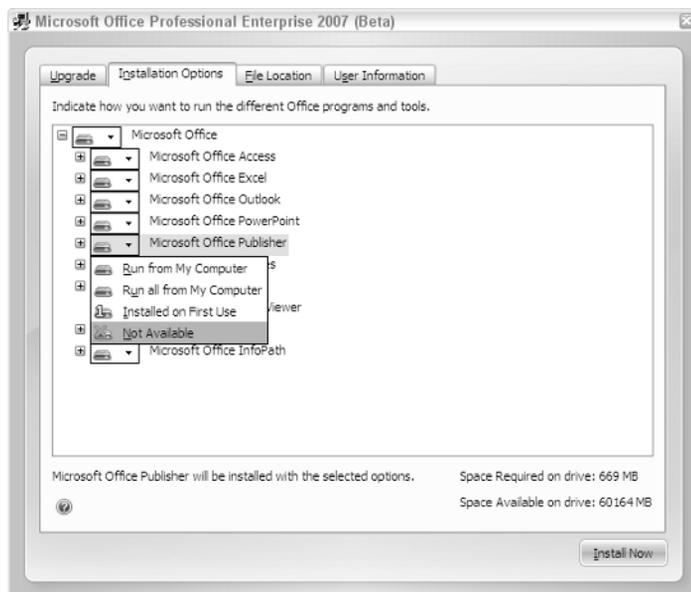
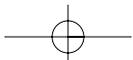


Figure 1-1: Choose how to install Microsoft Office 2007.





Installing Windows Vista

There's another new kid on the block. It's Windows Vista. Just as Office 2007 can be an upgrade to earlier versions of Office (or a clean install), Windows Vista can be an upgrade (or a clean install) to Windows operating systems such as Windows XP. The thing that's great about Windows Vista is the same thing that's great about Microsoft Office 2007; there are tons of new features and a cool new interface.

If you'd like to know more about Windows Vista visit www.microsoft.com/windowsvista. There you'll find all you need to know about the features, the community, and the minimum requirements. You can expect Windows Vista to be available for corporations at the end of 2006, and for home users in early 2007. You can install it as an upgrade or as a clean installation.

Understanding Product Keys, Activation, Registration, and Privacy

Before completing the installation of Office 2007, you must have a clear understanding of three key terms: product key, activation, and registration. As you already know, you have to input a valid product key to perform the installation. You may not be aware that after installation you have to activate the product too. However, you do not have to register to finalize or use Office 2007, even though you are prompted to do so at the end of the installation.

Activation and Product Keys

After installation you will, under almost all circumstances, be prompted to connect to the Internet to activate your copy of Microsoft Office 2007. Microsoft needs to verify that you have a legitimate copy of the product and activate it. (If the product is not properly activated, it will go into *reduced mode* after 50 launches.)

When you activate your copy of Office 2007, the product key is sent along with a hardware hash to Microsoft's activation system. This hash is a snapshot of your computer hardware. No personally identifiable information is sent during this time. At this point, Microsoft knows only what your machine consists of, not who you are, what your e-mail address is, or even from what city you are.

Activation is necessary because Microsoft wants to restrict you to installing Office 2007 on the appropriate number of computers, and to verify you have a legitimate copy of the product. Antipiracy technology takes care of this automatically. If you need to install Office 2007 on more machines, you'll need to purchase additional copies of the product, and they will require activation as well.

Activation limits help keep users from burning copies of the software and distributing it to others, or installing one copy of the product across an entire office. The product activation process helps enforce the software license terms that the user agreed to during the Office 2007 installation.



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Note

Activation is generally completed through the Internet, but you can activate over the telephone if necessary. You'll be prompted with a phone number to call if you do not have an Internet connection. You can obtain a hardware hash number from your PC and give it to Microsoft over the phone.

Once Microsoft knows what your machine looks like, you can install and uninstall the product as many times as you want on the same machine, and Microsoft can recognize that it's the same installation from the hardware hash each time you activate it. You'll need to read the software license terms specific to your suite to see if you can install Office on an additional computer, such as a laptop. In the past, this has been acceptable with consumer versions of the product.

There are a few miscellaneous items to add regarding product activation:

- In reduced functionality mode, you cannot save, edit, or create documents, but existing documents are not deleted.
- You can activate the product or view activation status from Microsoft Office Help, a small icon available on every page. It is a small blue icon with a question mark inside.
- Activation is completely anonymous.
- Common changes to a PC's hardware, such as upgrading video cards, adding a second hard drive, adding RAM, or installing a DVD drive, will not require reactivation.
- Microsoft cannot remotely access your machine, and they cannot revoke activation approval via the Internet.
- No cookies are placed on your machine during activation.

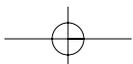
All About Registration

We recommend selecting Register for Online Services once installation is complete. Although you will be providing Microsoft with personally identifiable information when you register, the information you give will be securely stored and protected. You will also be able to check for and immediately download and install any updates to the product. These updates are sometimes security-related and sometimes feature-related, but whatever the case, we feel strongly about registering your product to obtain them. Regarding privacy, Microsoft goes to great lengths to protect the information you give them.

When registering though, unless you specify otherwise, you will receive e-mail from Microsoft and Microsoft Partners. This can be quite a bit of mail, and may eventually become bothersome. You can specify on the first registration page whether you want to receive e-mail. After registering, you can change your preferences at any time.

Once registered there are many things you can access.

- **Outlook Calendar Sharing Service:** This service lets you publish calendars to Office Online and other servers on the Internet. You can choose with whom to share your calendar.





- **Try New Beta Software:** You can try the beta versions of Microsoft's upcoming releases, and content changes often.
- **Updates:** You can check anytime for updates to all office products.

Protecting Your Privacy

It's important to be vigilant about your privacy, not just when communicating with Microsoft but also regarding any other Web site you visit. You may be surprised just how much these companies know about you. Everything you input and every icon or link you click can be tracked and generally is. While this is a good thing when offered by legitimate sites (it personalizes your Web experience), it can become a privacy nightmare with unscrupulous ones.

As noted in Microsoft's Online Privacy Notice Highlights page (<http://privacy.microsoft.com>), the personally identifiable information Microsoft acquires from you is obtained from what you give them when you create a Passport at www.passport.net, what you offer during registration, and any other information you give when accessing other Microsoft services and other companies (when logged in with a Passport). Microsoft uses cookies to keep track of your interactions with its sites and services, but of course, this is only to offer a more personalized experience. Cookies allow Microsoft to keep track of what you click when online and how you otherwise interact with Web sites. Microsoft also uses this information to send targeted e-mails if you've signed up for them. They can use the information they have to make sure you're getting information regarding services that interest you.

The amount of information Microsoft collects on people is sometimes off-putting though. For instance, if you have a Public MSN Profile (www.spaces.msn.com) you're asked to input a lot of information about yourself. This is all voluntary, but still, people do write incredibly personal information here, and make it public. MSN Profiles can include marital status, hometown, contact information, name of your significant other, personal cell phone number, home fax, personal e-mail, birthday, anniversary, and more. Be very careful what you offer. It will be kept and stored.

While some of this may sound a little scary, you can rest assured that Microsoft does not sell, rent, or lease your information to anyone. You can also stop e-mail at any time by changing your preferences at the Passport Web site.

What Office 2007 Brings to the Table

There are currently eight Microsoft Office 2007 suites ranging from Microsoft Office Basic 2007 to Microsoft Office Enterprise 2007. Each version contains a different set of office applications. This book covers the applications included in Microsoft Office Professional 2007, which are Word, Excel, Outlook, PowerPoint, Publisher, Outlook with Business Contact Manager, and Access. Each of these products has a new look and new features, and better ways to collaborate.



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New Interface

The first thing you'll notice when you start using Office 2007 is the new and improved interface. There's a lot of material in this book to get you up to speed on this. The interface is completely redesigned and contrary to what Microsoft implies, is going to take some time to master. There are no longer drop-down menus; instead, you select a tab at the top of the page, and the choices change underneath the tab depending on what you've selected. Some of the old standbys are hard to find though, like settings that were easily accessed in Office XP's Word's Tools → Options. There, you could set everything from user information to formatting marks to spelling and grammar. You'll have to learn to navigate through the new interface to find those preferences now.

Look at Figures 1-2 and 1-3 and you'll understand how drastic the changes are. The figures show two tabs in Word and how the choices change when a tab is selected. You learn more about the new interface starting with Part III. Not having any drop-down lists is going to take some getting used to.

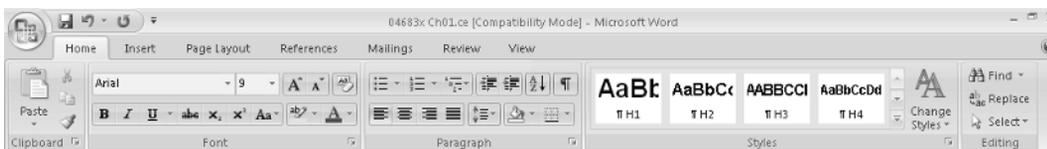


Figure 1-2: Office now has tabs instead of drop-down menus. This is Word, and Home is selected.

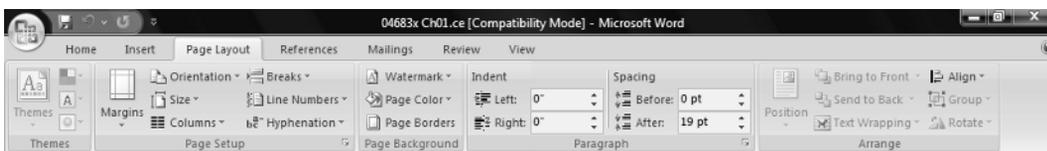
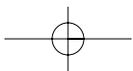


Figure 1-3: This shows Word with Page Layout selected. Notice how the options are different than in the previous figure.

New Features

Microsoft has certainly changed the interface, but the features you've come to rely on are still there. In Figure 1-2, you may recognize the familiar icons for Bold, Italic, and Underline, icons to add bulleted lists and numbered lists, and icons for managing other common tasks like changing a font or font size. But the changes to Word and other applications are more than just a reordering of tools and offering a new and more intuitive way to access them.

The release of Microsoft Office 2007 is a major breakthrough in office software. The building blocks in this release allow developers to create custom-made solutions for workers and home users alike. This office suite lets users from enterprise, small business, and the home take advantage of new collaboration tools, content management tools, and timesaving interfaces that together create a more productive environment.





Some of the new features are listed here:

- The new uncluttered workspace has a Web-like interface.
- Ribbon, the new sets of commands and tabs, keep all tools relevant to the task in progress at the forefront.
- Contextual Tabs offer unique sets of commands appropriate for the particular type of data being edited. For instance, in Excel, clicking a chart opens a new contextual tab with options for chart editing.
- Galleries, combined with Live Preview, provide a set of clear results for a particular project and allow you to create a professional looking presentation, document, or spreadsheet easily. With Live Preview, you can see what the final product will look like before actually applying the style or template; simply hover your mouse over the gallery style you like.
- The interface is extensible. This means that developers can add functionality to additional releases of Office so that their programs integrate with Office. That means developers can add Contextual Tabs, interface tabs, and Galleries.

Summary

Installing and activating Microsoft Office 2007 usually goes very smoothly. However, you can increase the likelihood of success by performing a few preinstallation tasks. Cleaning up your computer, backing up data, and understanding what type of installation you need are the main three. Once installed, you'll be prompted to activate and register the product. Activation is necessary, but registration is not, and there are pros and cons for the latter. We suggest you register your product immediately, and take advantage of updates, tips and tricks, and other perks.

Once installed and activated, you'll experience the new interface, complete with new tabs and no drop-down lists. You can explore Ribbon, Galleries, Live Preview, and the new uncluttered look and feel. Once you've installed and introduced yourself to the product, you can move forward to Chapter 2. If you already have even only a modest familiarity with Windows and the Office applications, you can flip around the book to locate what you need to know right now.

