

Chapter

1

Maximize the Power of Office 2007

The various applications in Microsoft Office 2007 — in particular, Word, Excel, PowerPoint, Access, and Outlook — share a common look and feel. Indeed, you can find many of the same features in each program, such as the new Ribbon feature, the Quick Access toolbar, various program window controls, and the new Office menu.

This common look and feel is helpful when you perform certain tasks within Office applications. For example, creating a new document in Word is similar to creating a new document in Excel.

The same goes for more complicated tasks, such as encrypting documents, tracking changes to a document, adding a digital signature, marking a document as final, and so on. This commonality makes mastering Office 2007 a snap.

This chapter focuses on tasks that transcend applications. That is, these tasks can be performed in more than one Office program. Although some of these tasks do apply to Access and Outlook, most relate only to Word, Excel, and PowerPoint.

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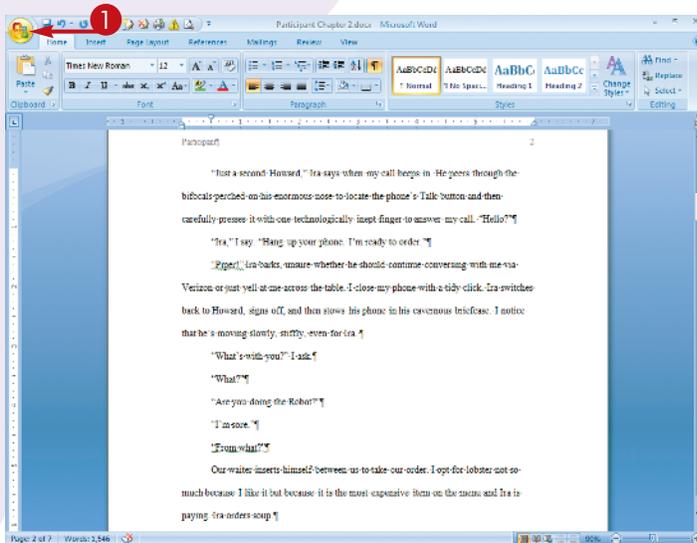
Make a document BACKWARD COMPATIBLE

By default, documents you create with Office 2007 are saved with an x at the end of the file extension — for example, .docx, .xlsx, and so on. Documents with this type of file extension can be opened and read only by others who also use Office 2007.

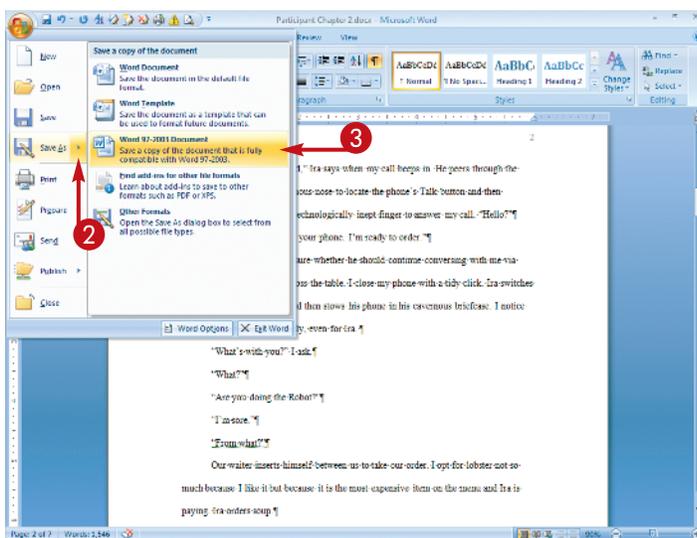
If you frequently share documents with others who use earlier versions of the software suite, you can save the documents you create in Office 2007 in *Compatibility Mode* — a format that is compatible

with earlier versions of Office (or, in other words, a format that is *backward compatible*). Documents saved in Compatibility Mode can be opened and read by people who use earlier versions of the software. Documents in compatibility mode do not include the x at the end of the file extension.

Be aware that saving a document in Compatibility Mode means that those functions of Office 2007 that are not supported by earlier versions of Office are disabled.



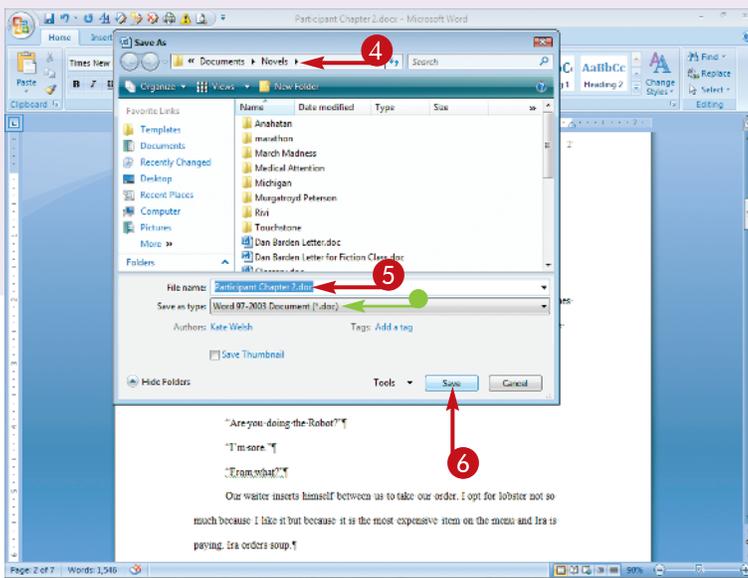
- 1 With the document you want to make backward compatible open, click the Office button.



The Office menu opens.

- 2 Click here.
- 3 Click Word 97–2003 Document.

Note: In this case, Word 97–2003 Document is chosen because a Word document serves as the example in this task. If you are saving another type of document, such as an Excel document, the precise verbiage will differ.



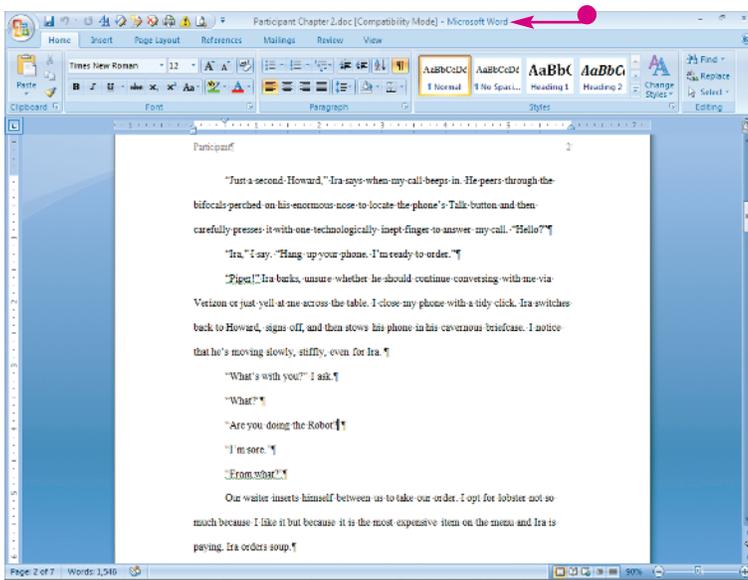
The Save As dialog box opens.

4 Locate and select the folder in which you want to save the backward-compatible document.

5 Type a name for the document.

● Notice that the file type listed in the Save as type field is Word 97–2003 Document.

6 Click Save.

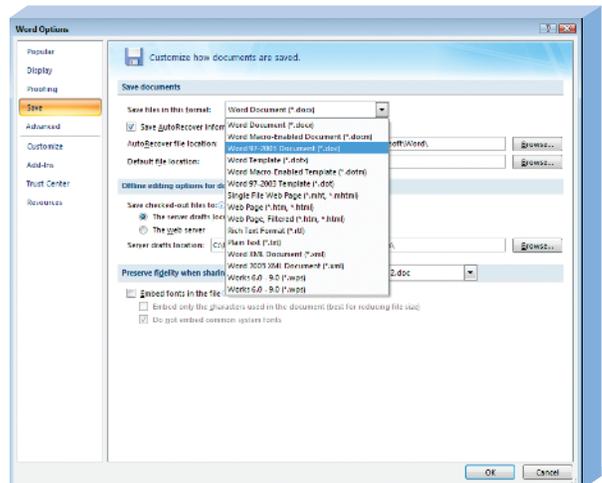


● The document is saved in Compatibility Mode, as denoted in the application window's title bar.

TIP

Did You Know?

You can set up the various programs in Office to automatically save documents in Compatibility Mode. To do so, click the Office button and then click the *Program Name* Options button at the bottom of the menu. In the window that appears, click Save, click the Save files in this format drop-down arrow, select the desired format, and click OK.

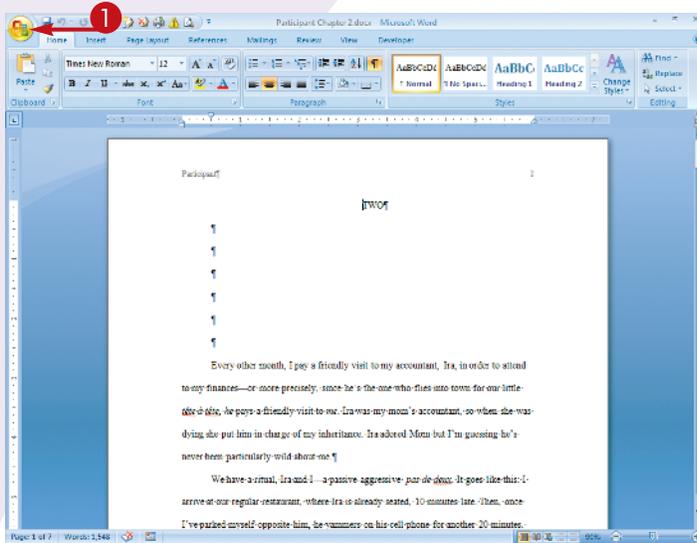


Save Office documents as WEB PAGES

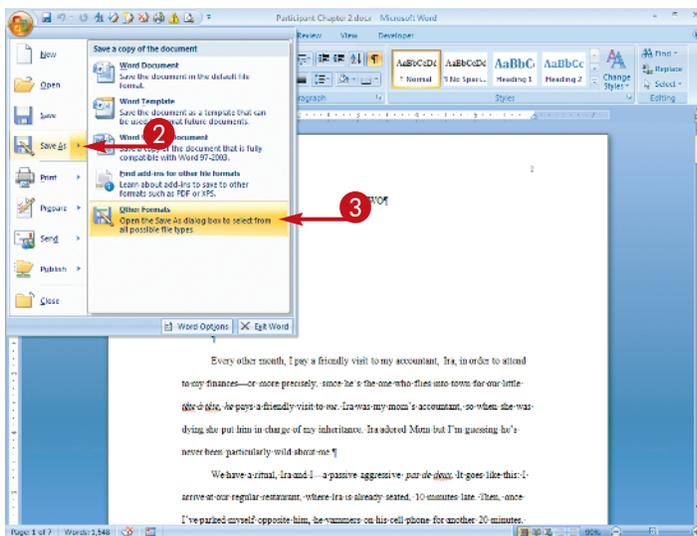
If you have access to a Web server, you can share your Office documents by saving them as Web pages. In this way, you can share your Office files with others who do not use Office.

When you save an Office document as a Web page, Office converts the document to a hypertext markup language (HTML) file. This file contains all the necessary coding to be displayed by a Web browser such as Internet Explorer 7.

Of course, simply saving an Office file as an HTML document is not enough to share it with others online. You will also need to upload the HTML file to a Web server. That requires using a Web host. You might have access to Web-hosting services through your Internet service provider; contact your provider to find out. If not, you can sign up with a Web-hosting service to place your HTML pages online. For specific instructions on uploading your Office documents to the Internet, consult with your provider.



- 1 With the document you want to save as a Web page open, click the Office button.

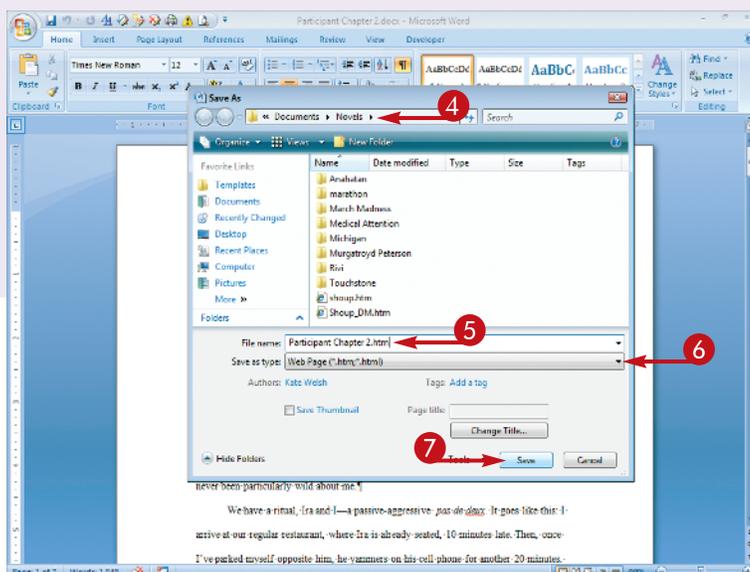


The Office menu opens.

- 2 Click here.
- 3 Click Other Formats.

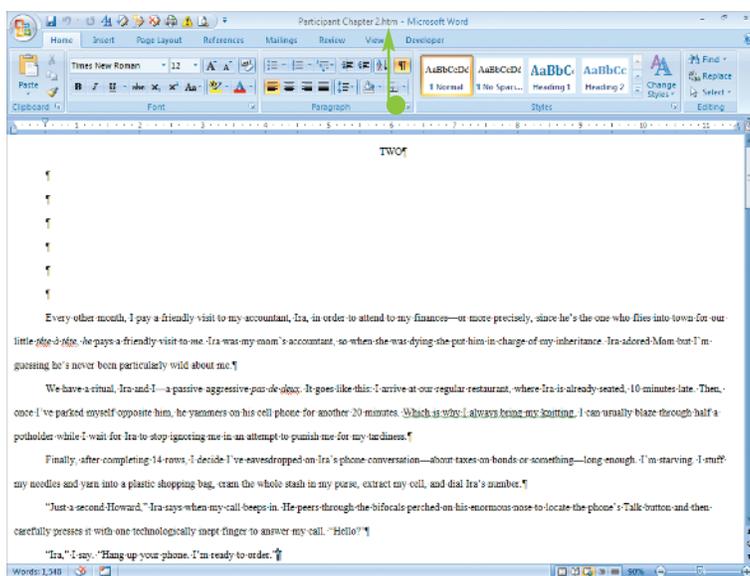
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DIFFICULTY LEVEL



- 4 The Save As dialog box opens.
- 5 Locate and select the folder in which you want to save the Web page.
- 6 Type a name for the Web page.
- 7 Click here and select Web Page (*.htm, *.html) from the list that appears.
- 7 Click Save.

- The document is saved as a Web page.



TIPS

Try This!

You can change the title of the page – that is, the name of the page as it appears in the Web browser's title bar when the page is displayed. To do so, click Change Title in the Save As dialog box. Then, in the Set Page Title dialog box that appears, type the desired title and click OK.

Did You Know?

If you have access to a document management server, you can publish your Office document to that server. To do so, click the Office button, click Publish, and click Document Management Server. In the dialog box that appears, locate and select the folder on the document management server in which you want to save the document and click Save.

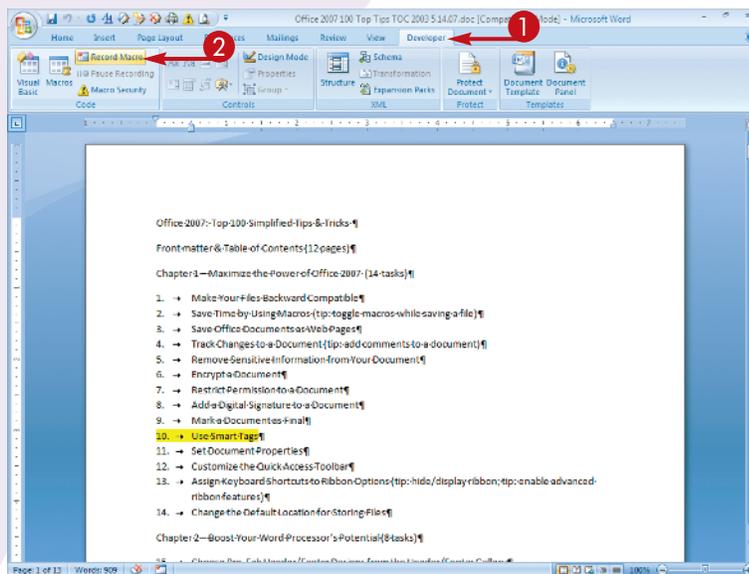
Automate Office tasks with MACROS

If you frequently use an Office program to complete the same task — for example, to format the cells in a spreadsheet a certain way, or to insert a table in a Word document that contains a certain number of rows and columns (as shown here) — you can expedite the process by recording a macro. When you record a macro, you essentially record a series of actions. Then, you can run the macro you recorded to automatically perform the recorded actions.

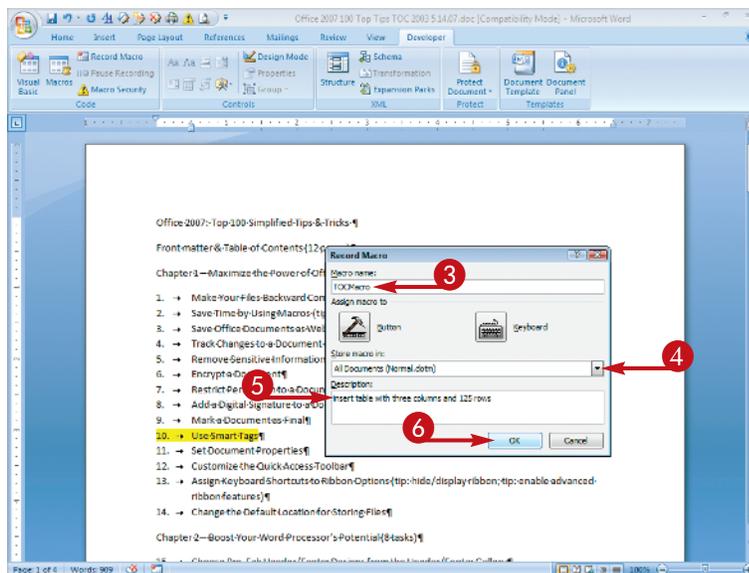
One way to access the controls for recording a macro is from the Developer tab on the Ribbon. This tab is

not displayed by default, however. To display the Developer tab, click the Office button, click *Program Name* Options, click Popular, and click the Show Developer Tab in the Ribbon check box to select it.

Note that recording a macro in Access differs somewhat from recording macros in other Office programs, such as Word, Excel, and PowerPoint. For information on creating macros in Access, see Chapter 8.



- 1 Click the Developer tab in the Ribbon.
- 2 In the Code group, click Record Macro.



The Record Macro dialog box opens.

- 3 Type a name for the macro.
- 4 Click here and select the template(s) in which you want the macro to be available.
- 5 Type a description of the macro.
- 6 Click OK.

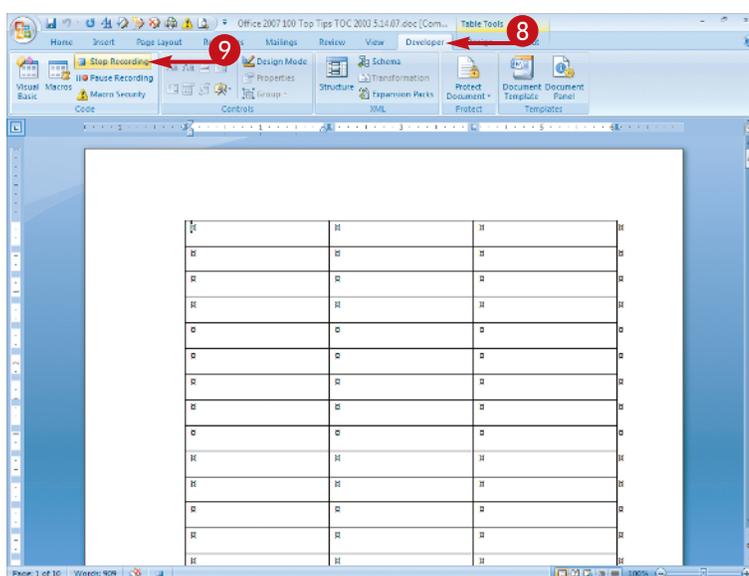
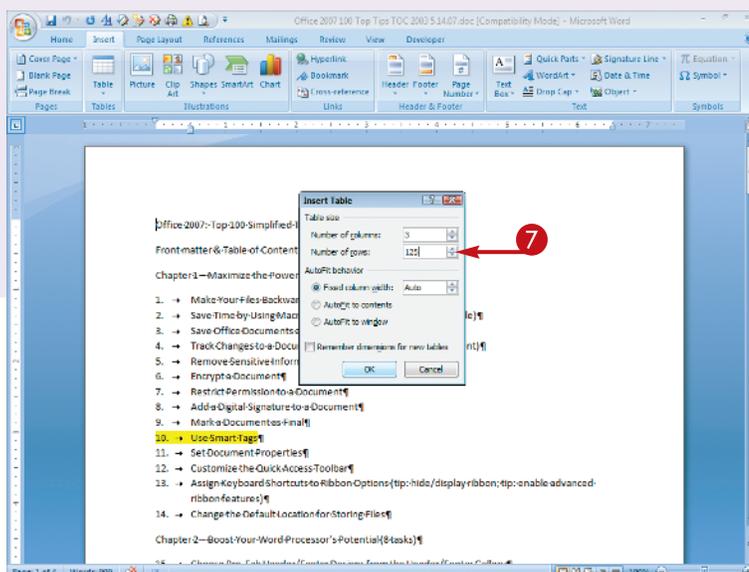
Your mouse pointer changes to a pointer with a cassette tape icon.

#3

DIFFICULTY LEVEL

- 7 Perform the actions you want to record.

In this example I inserted a table with 3 columns and 125 rows.



- 8 Click the Developer tab.
- 9 Click Stop Recording.
Excel saves the macro.

TIPS

Apply It!

To run a macro you have recorded, click the Developer tab and click Macros in the Code group. In the Macros dialog box that appears, click the macro you want to run, and then click Run.

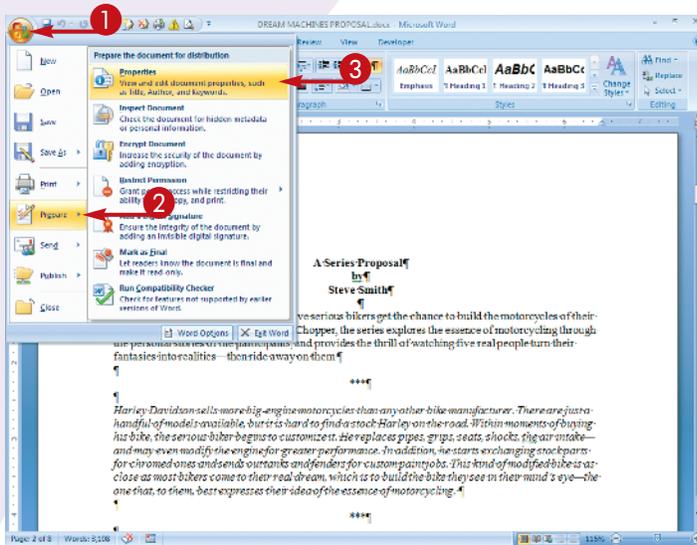
Attention!

Because macros can be created for malicious purposes, they are often disabled by default. To enable the use of macros in a particular document, click the Office button, click *Program Name* Options, click Trust Center, click Trust Center Settings, and then click Macro Settings. Finally, click Disable all macros with notification. That way, when Office encounters a document that contains macros, it will display a security dialog box that enables you to specify whether the macros should be allowed.

Set DOCUMENT PROPERTIES

Office automatically embeds certain document properties, or *metadata*, such as the size of the document, the date it was created, and so on, in the document file. In addition to these default properties, you can supply other document properties, which you can then use to organize and identify your documents, as well as search for documents at a later date. For example, you can enter an author name, a title, a subject, keywords, a category, status information, and comments. You can also add custom properties, such as the client name, department, date completed, and even typist.

You can view certain document properties that are recorded automatically in the Open or Save As dialog box. To do so, simply click the document you want to view in either dialog box, click the down arrow next to Views, and then choose Details. To view properties of a document that you yourself add, open the document, click the Office button, click Prepare, and click Properties.

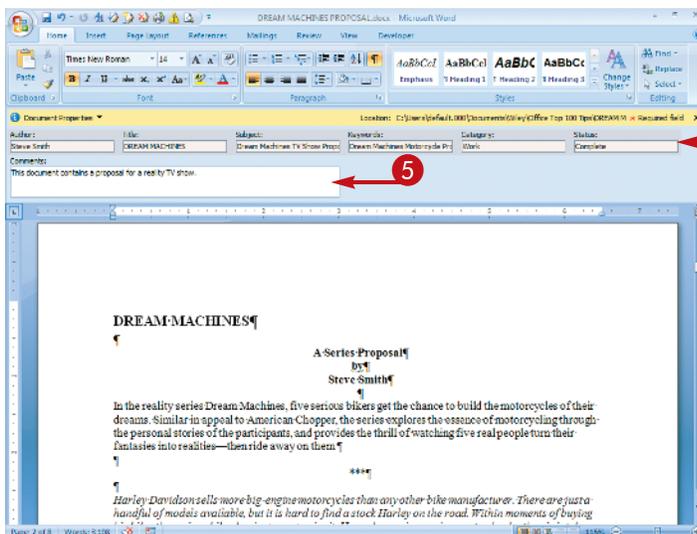


1 With the document whose properties you want to set open, click the Office button.

The Office menu opens.

2 Click here.

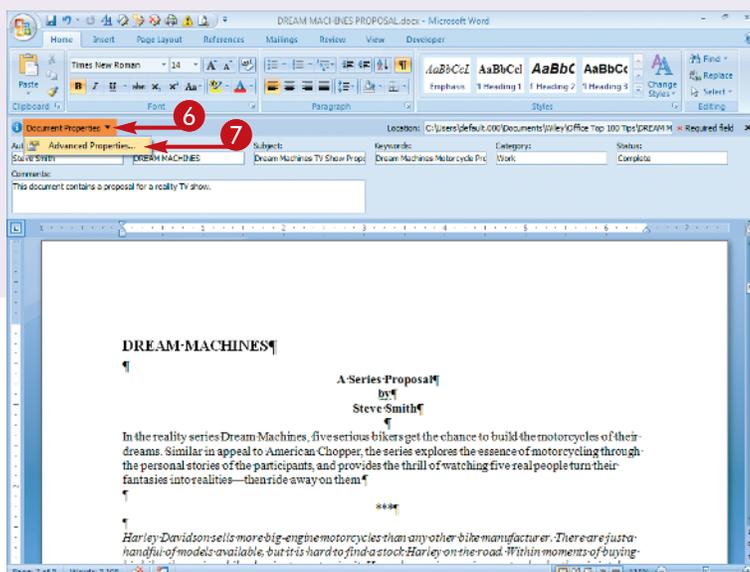
3 Click Properties.



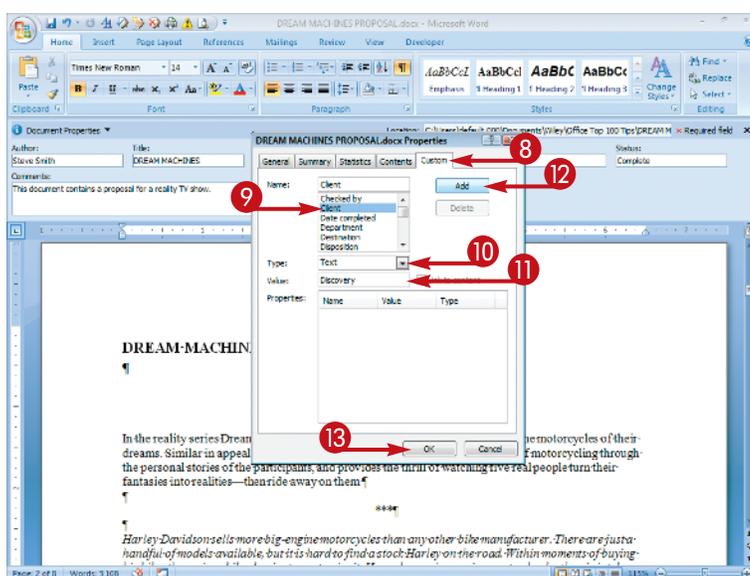
The Document Properties pane appears.

4 Type the document properties in their respective fields.

5 Type comments about the document.



- 6 Click here.
- 7 Click Advanced Properties.



- 8 To create a custom document property, click the Custom tab.
 - 9 Type a name for the property. Alternatively, click a name in the Name list (here, Client is selected).
 - 10 Click here and select the type of value the custom property should contain — for example, Text.
 - 11 Type the value for the document property (here, the client's name is used).
 - 12 Click Add.
 - 13 Click OK.
- The custom property is applied to the document.

TIPS

Did You Know?

In addition to enabling you to set custom properties, the Properties dialog box also enables you to see a summary of the properties set, as well as statistics about the document, such as the page count, word count, and even whether the document has been printed.

Cross-Platform!

Windows Vista users can search using document properties with the operating system's built-in search function. If you use Windows XP, however, you must first download the Windows Desktop Search tool from the Microsoft Web site.

More Options!

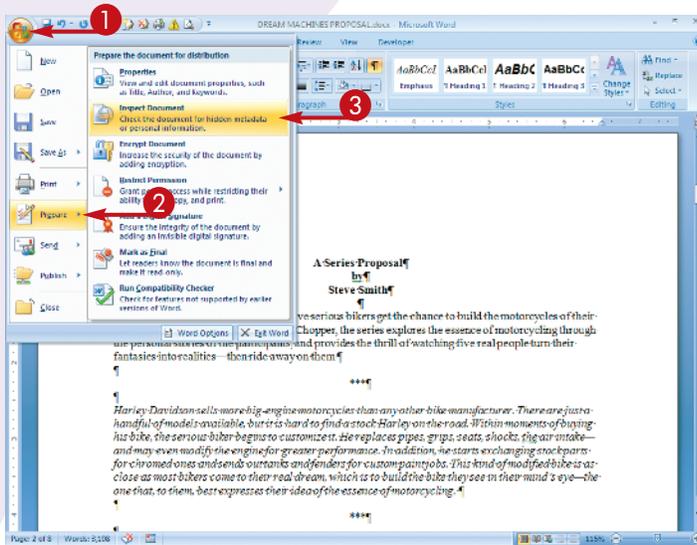
To close the Document Properties pane, click the Close button in the pane's upper-right corner. You can click the Cancel button to close the Properties dialog box without saving any changes.

REMOVE SENSITIVE INFORMATION from your document

If you plan to share an Office document with others, whether via e-mail or by some other method, you might want to first ensure that the document is void of personal, company, or other private information that may be stored in the document's metadata or in the document itself.

This information might include comments, tracked changes, or annotations; information about the

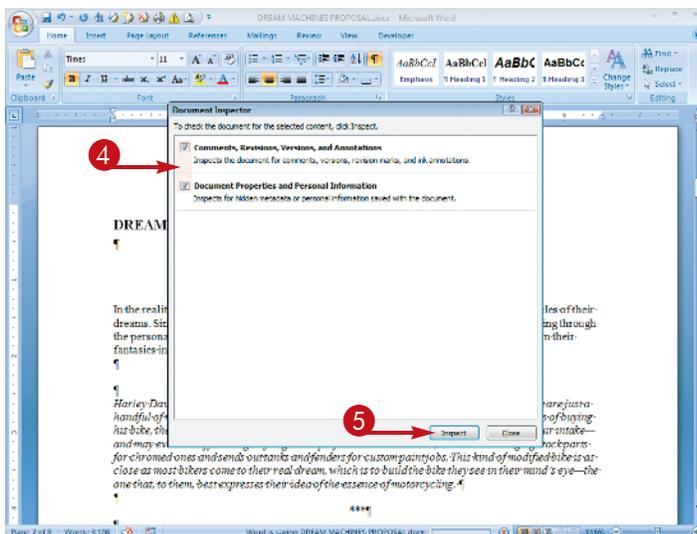
document's author, status, category, keywords, and so on; hidden information (such as text, rows, columns, worksheets, or what have you) or content marked "invisible"; server properties; custom XML data; and more. (Note that if you remove hidden data from a document, you might not be able to restore it.) To locate and remove this data, you can use the 2007 Office Document Inspector.



- 1 With the document you want to check for sensitive information open, click the Office button.

The Office menu opens.

- 2 Click here.
- 3 Click Inspect Document.

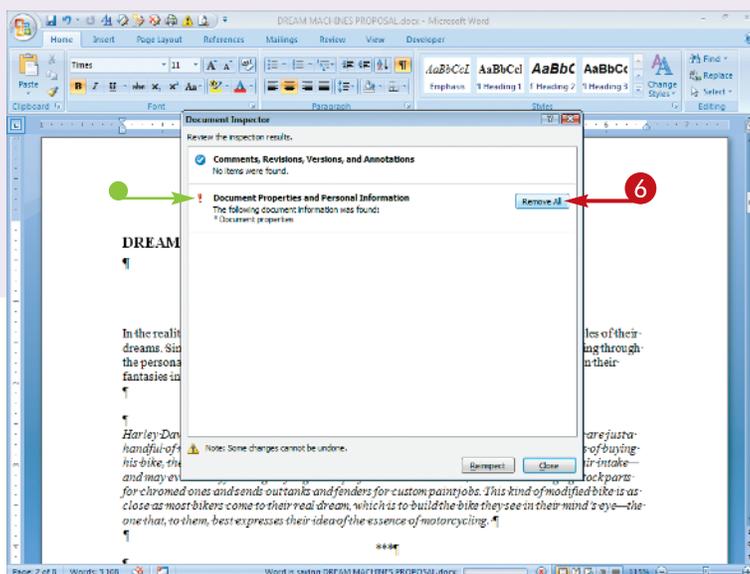


The Document Inspector dialog box opens.

- 4 Ensure that the check box next to each type of content you want to inspect is checked.
- 5 Click Inspect.

#5

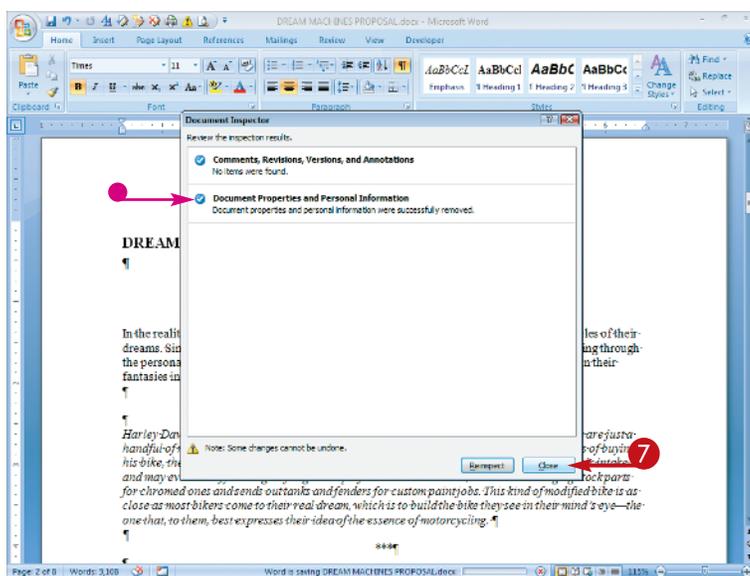
DIFFICULTY LEVEL



The Document Inspector determines whether any sensitive information appears in the document.

- If the Document Inspector locates sensitive information in the document, it flags it.

6 Click Remove All.



- The Document Inspector removes the sensitive information.

7 Click Close.

TIPS

Caution!

If you are not sure whether you want to remove the information flagged by Document Inspector, cancel the inspection and use the appropriate Office tools to view the information. For example, if document properties are flagged, then view the document properties to see whether you want to eliminate them from the document.

Caution!

You cannot undo the effects of removing information with Document Inspector. You can, however, restore the removed information by closing the document without saving the changes made by the inspection process.

Did You Know?

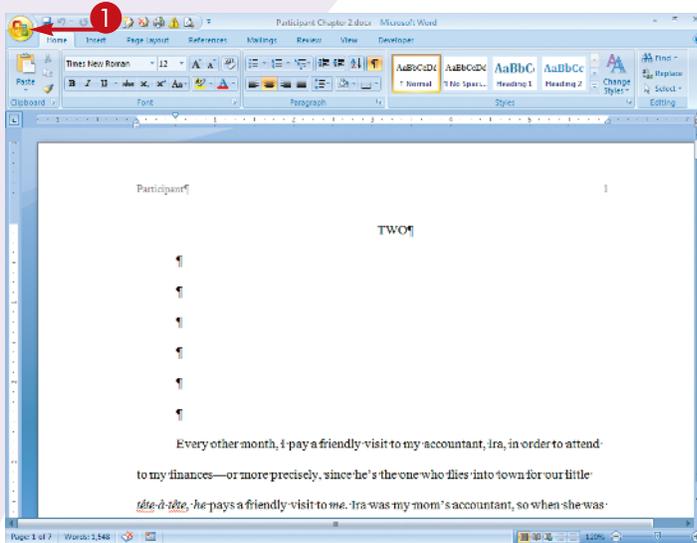
Be aware that the particulars of using Document Inspector vary slightly depending on whether you are using it in Word 2007, Excel 2007, or PowerPoint 2007.

ENCRYPT a document

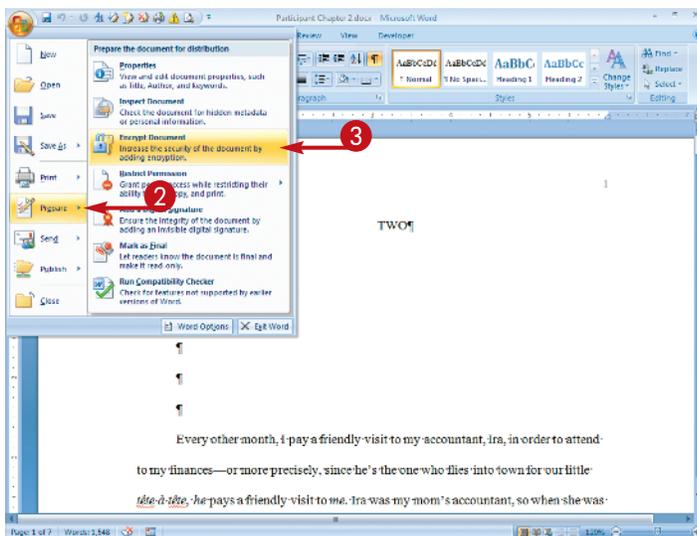
If you are working on a document that contains sensitive information, you might want to encrypt it. That way, for someone to open the document and view its contents, he or she will need to enter a password, which you set. When you encrypt an Office document, you set a password for it; to open the document, the password is required.

Be aware that if you forget the password, you will not be able to open the document, even if you are the

person who encrypted it. For this reason, it is imperative that you choose a password that you will not forget, or that you write the password down and keep it in a safe place. That said, the password should not be easy for others to guess. The strongest passwords contain at least eight characters and are composed of a mixture of uppercase and lowercase letters, numbers, and symbols. Avoid using common passwords such as pet names, birth dates, and so on.

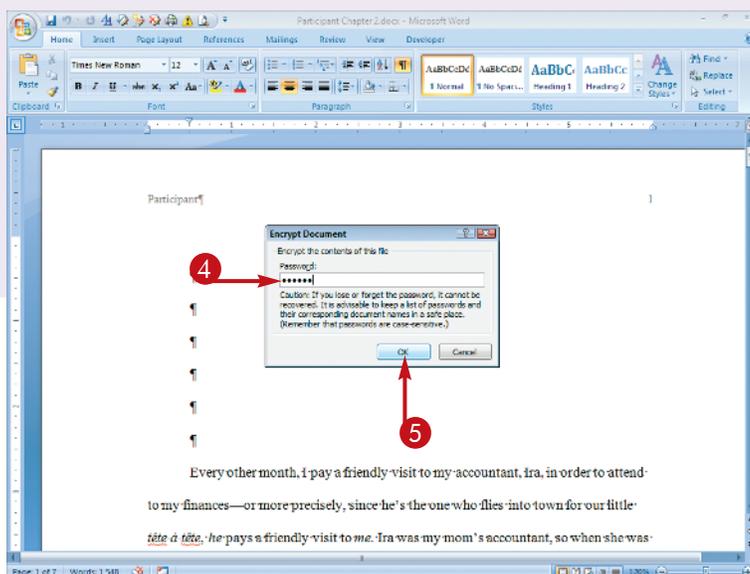


- 1 With the document you want to encrypt open, click the Office button.



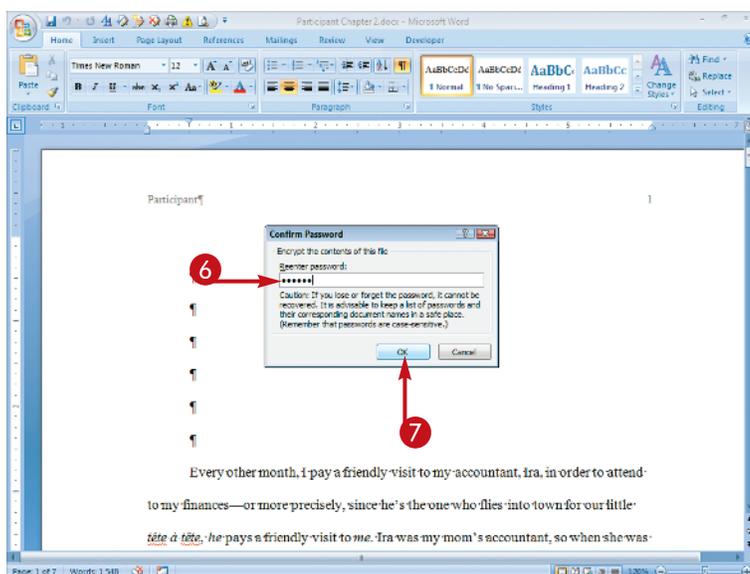
- The Office menu opens.
- 2 Click here.
- 3 Click Encrypt Document.

#6



The Encrypt Document dialog box opens.

- 4 Type the password you want to assign to the document.
- 5 Click OK.



The Confirm Password dialog box opens.

- 6 Type the password again to confirm it.
 - 7 Click OK.
- Office encrypts the document.

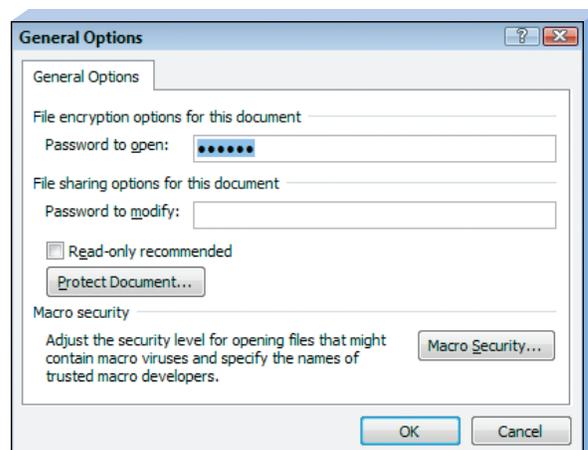
TIPS

Apply It!

Open an encrypted document just as you would any other document — for example, by double-clicking it. When you do, Office displays the Password dialog box; type the password and click OK.

Remove It!

To unencrypt a document, open it, click the Office button, and click Save As. In the dialog box that opens, click the Tools drop-down arrow and choose General Options; then delete the password in the Password to open field.

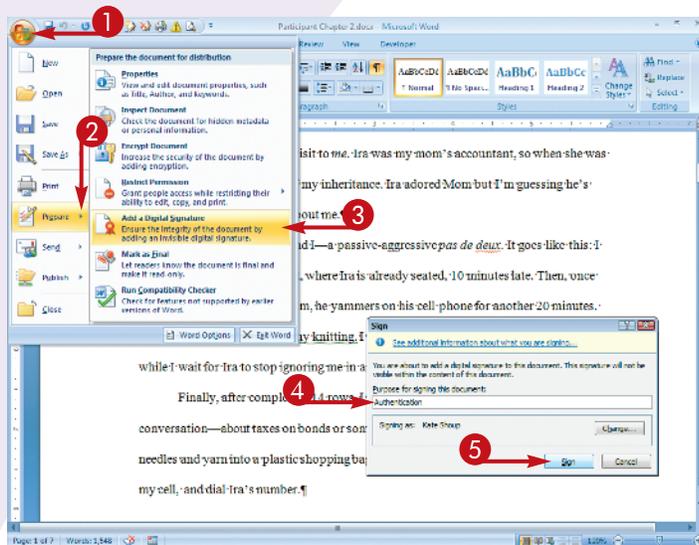


DIGITALLY SIGN a document

To authenticate an Office document, you can add a digital signature to it. First, however, you must create a digital ID and have a current *digital certificate*, which is a means of proving identity. A digital certificate is issued by a *certificate authority*, which is a trusted third-party entity. (If you do not have a digital ID, you are prompted to create one as you complete this task.)

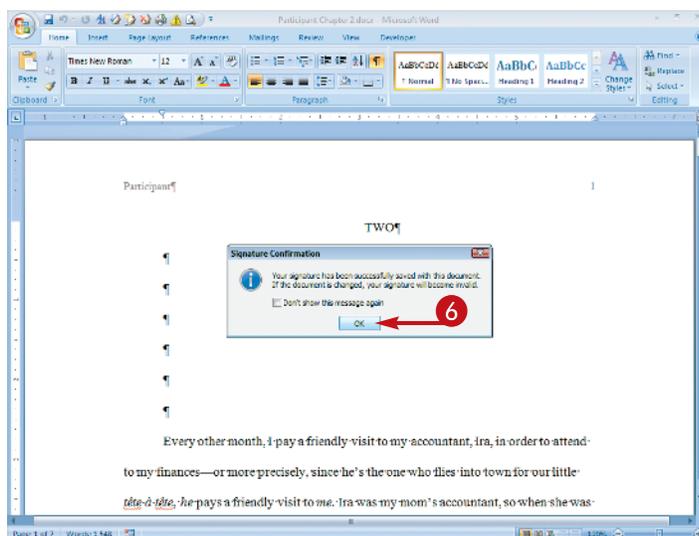
A digital signature contains a *message digest*, which contains a reduced version of the document's

contents, and a *private key*, which is used to encrypt the message digest on the signer's computer. When you sign a document, the encrypted version of the message digest is appended to the document; the digest is then decrypted by the recipient using the *public key*, included in the digital certificate associated with the signature. In this way, the recipient can confirm the origin of the document and that the contents of the document did not change during transit.

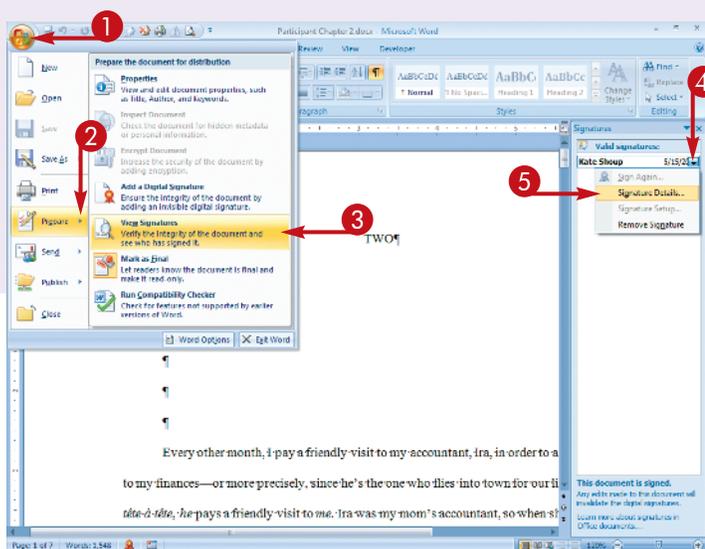


SIGN A DOCUMENT

- 1 With the document you want to sign open, click the Office button.
The Office menu opens.
- 2 Click here.
- 3 Click Add a Digital Signature.



- 4 Optionally, type your reasons for signing the document in the Purpose for signing this document box.
- 5 Click Sign.
The Signature Confirmation dialog box opens.
- 6 Click OK.
The document is signed.



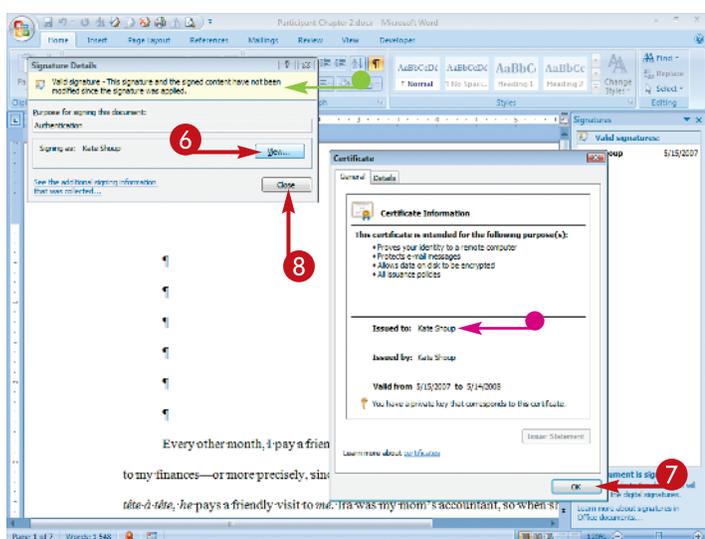
VIEW A SIGNATURE

- 1 With the document whose signature you want to view open, click the Office button.
- 2 Click here.
- 3 Click View Signatures.
- 4 Click here.
- 5 Click Signature Details.

The Office menu opens.

The Signatures pane opens.

The Signature Details dialog box opens.



- The signature is deemed valid.
- 6 Click View.
 - 7 Click OK.
 - 8 Click Close.
- The Certificate dialog box opens.
- Information about the certificate appears here.
- The Signature Details dialog box closes.

TIP

Important!

You are not required to obtain a digital certificate from a certificate authority in order to create a digital ID and sign your Office documents; instead, you can create your own. To do so, click Create your own digital ID instead of Get a digital ID from a Microsoft partner in the Get a Digital ID dialog box, which is displayed automatically if no digital ID is present on your computer. Then, in the Create a Digital ID dialog box that appears, enter the requested information — name, e-mail address, organization, and location — and click Create. Note, however, that when you share a file signed with a digital ID you created, it cannot be authenticated by users on other machines.

Get a Digital ID

In order to sign a Microsoft Office document, you need a digital ID. You have two options for getting a digital ID:

 Get a digital ID from a Microsoft partner

If you use a digital ID from a Microsoft partner, other people will be able to verify the authenticity of your signature.

 Create your own digital ID

If you create your own digital ID, other people will not be able to verify the authenticity of your signature. You will be able to verify the authenticity of your signature, but only on this computer.

[Learn more about digital IDs in Office...](#)

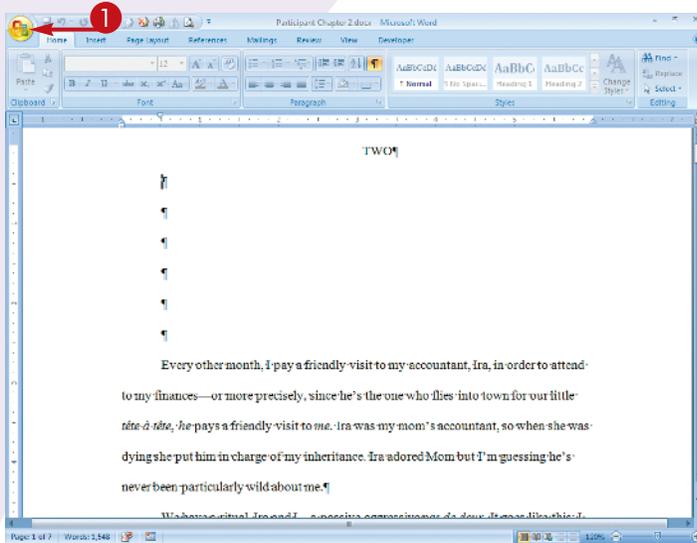
OK

Cancel

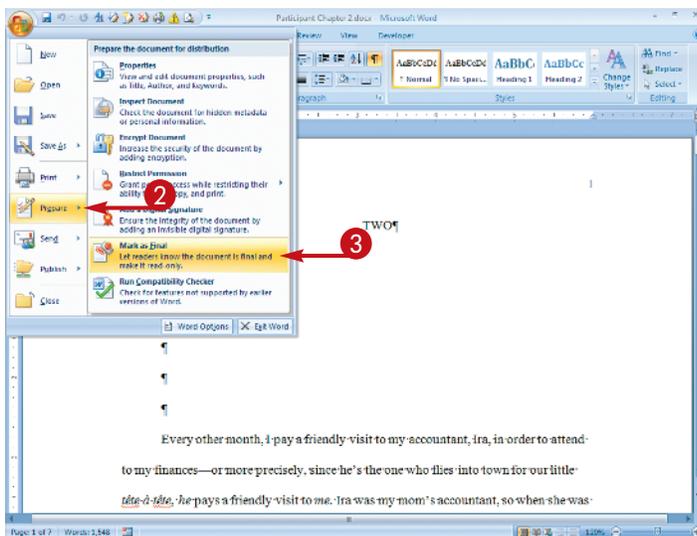
Mark a document as FINAL

After you finish working on a document — that is, you have proofread it and accepted any revisions made with the Track Changes feature — you can mark it as final. Marking a document as final makes the file read-only, thereby preventing changes from being made to the document. The document can, however, be opened and read by others. (Note that the file is read-only when opened by users whose systems run Office 2007. If the document is saved in

Compatibility Mode and opened in an earlier version of Office, the file will not open in read-only mode.) Marking a file as final is not a security feature. That is, it does not permanently and irrevocably lock the document to prevent further edits. Anyone with access to the document can revoke the Mark as Final status. Steps for revoking Mark as Final status appear among the tips at the end of this section.



- 1 With the document you want to mark as final open, click the Office button.

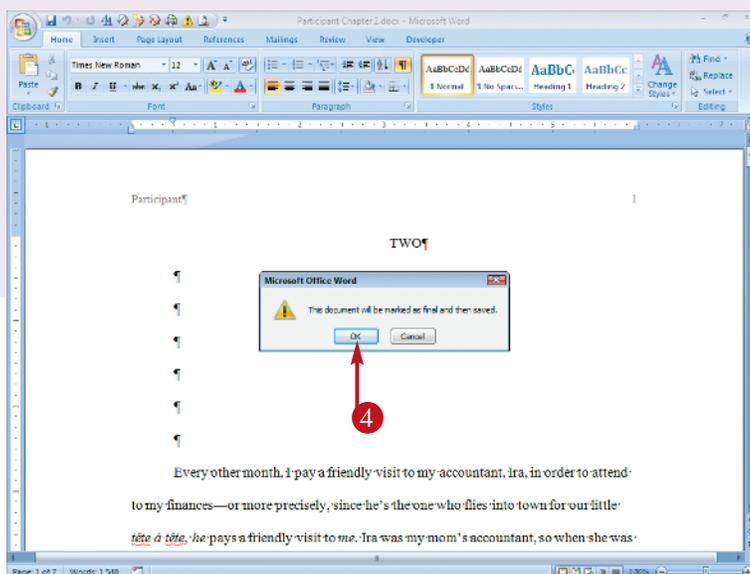


The Office menu opens.

- 2 Click here.
- 3 Click Mark as Final.

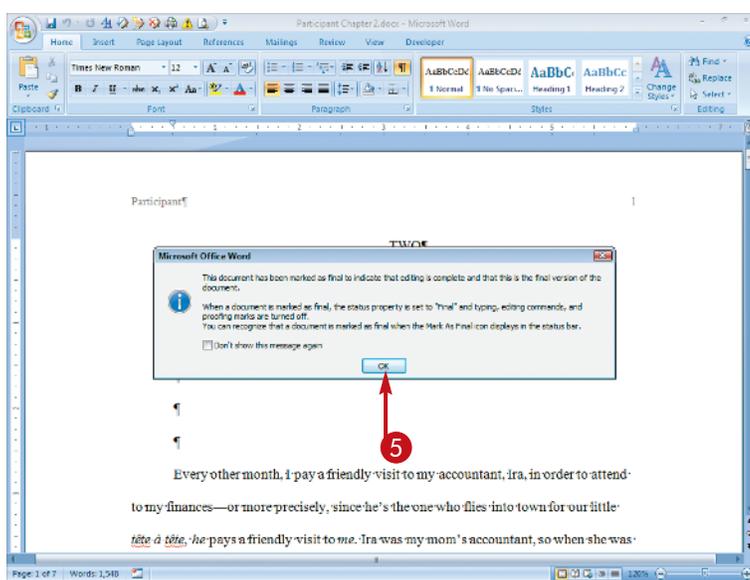
Office notifies you that the file will be marked as final and saved.

- 4 Click OK.



Office describes the actions that have been taken.

- 5 Click OK.
The document is marked as final.



TIPS

Did You Know?

If a document has been marked as final, it displays a special Mark as Final icon along the bottom of the screen.

Did You Know?

When a document is marked as final, the document's Status property changes to Final. That means you can search for the document using that status as a criterion.

Remove It!

You revoke the Mark as Final status the same way you apply it: by clicking the Office button, clicking Prepare, and clicking Mark as Final. Revoking Marked as Final status means the document can again be edited.

Enable SMART TAGS

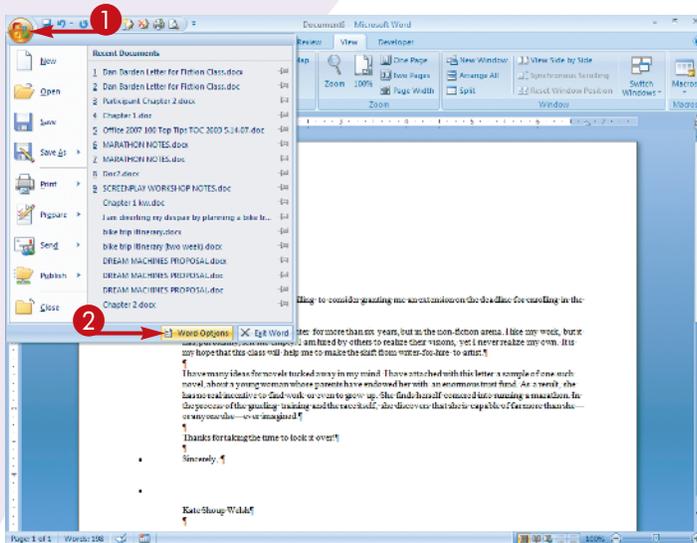
Several Office programs support the use of smart tags, which are labels that indicate that the document contains data of a particular type, and enable you to perform certain tasks using that data.

For example, if Office detects a name in your document, it can display a *smart tag indicator*, a purple dotted line. You can click the smart tag indicator to open the contact record in Outlook that is associated with that name, add the name to your Outlook contacts, schedule a meeting with the person, or insert the person's address. (The precise

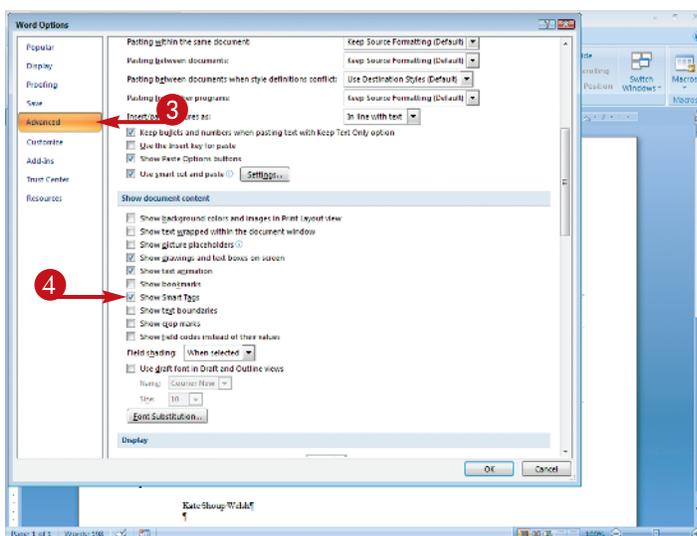
options available to you when you click the smart tag indicator depend on what type of data is detected.)

To use smart tags, you must first enable them. In addition to using the smart tags that are available within Office, you can obtain additional smart tags from Microsoft as well as from third-party companies.

Note that you can embed smart tags in Excel and PowerPoint documents; that way, others who open the document on their own computers can view the smart tags.



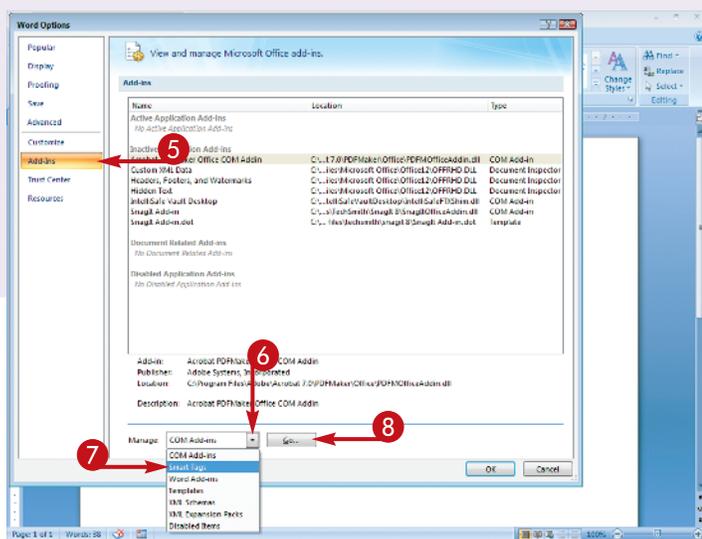
- 1 Click the Office button.
- 2 Click *Program Name Options*.



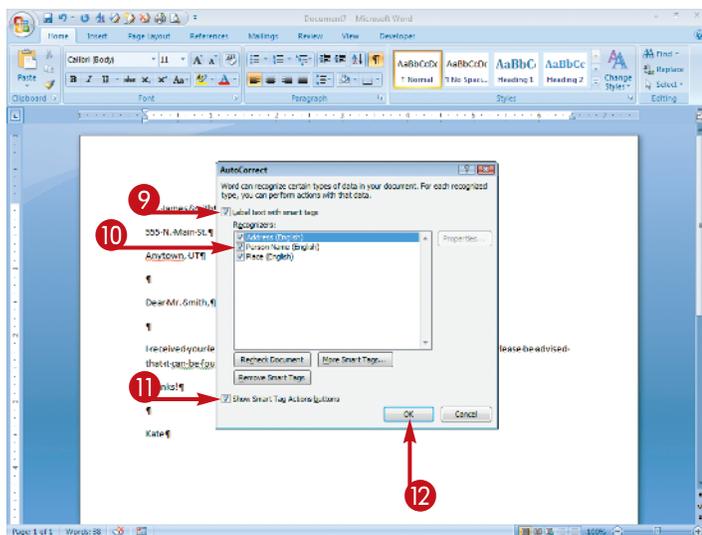
- 3 If you are enabling smart tags for Word, click Advanced.
- 4 Click Show Smart Tags (changes to)

The *Program Name Options* window opens.

Note: If you are in Excel or PowerPoint, click *Add-Ins* instead of *Advanced*, and click the *Manage* drop-down arrow, click *Smart Tags*, and click *Go*; then, choose the desired options in the dialog box that appears.



- 5 Click Add-Ins.
- 6 Click the Manage drop-down arrow.
- 7 Click Smart Tags.
- 8 Click Go.



- The AutoCorrect dialog box opens.
- 9 Click here to label text with Smart Tags (changes to).
 - 10 Click each type of data you want to flag with smart tags (changes to).
 - 11 If you are enabling smart tags for Word, click Show Smart Tag Actions buttons (changes to).
 - 12 Click OK.

Office enables smart tags in the program that is currently open.

TIPS

Check It Out!

To obtain additional smart tags, open the AutoCorrect dialog box and click More Smart Tags. Office launches a special page on Microsoft Office Online that enables you to access links to additional smart tags created by Microsoft as well as by third-party software vendors. You can also find links to tools for building your own smart tags.

More Options!

Similar to smart tags are AutoCorrect and Paste Options tools. AutoCorrect works by displaying an AutoCorrect button anytime an Office program corrects text that you enter; click the button to undo or adjust the correction. Paste Options displays a Paste button when you paste data into a document; click it to specify how you want the content pasted in.

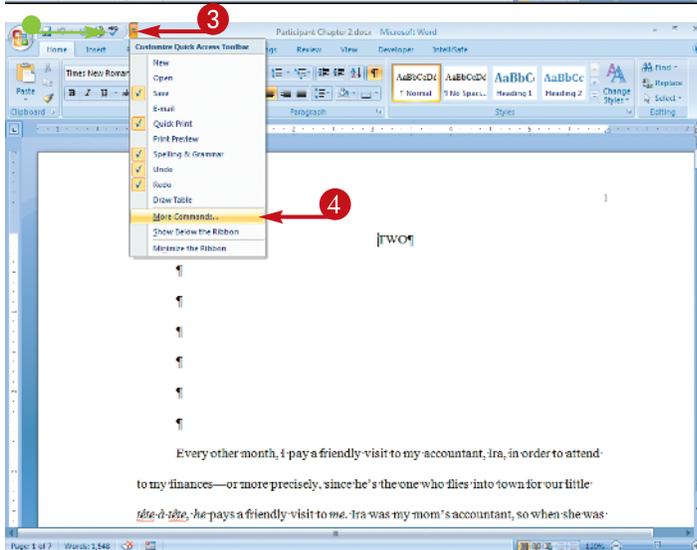
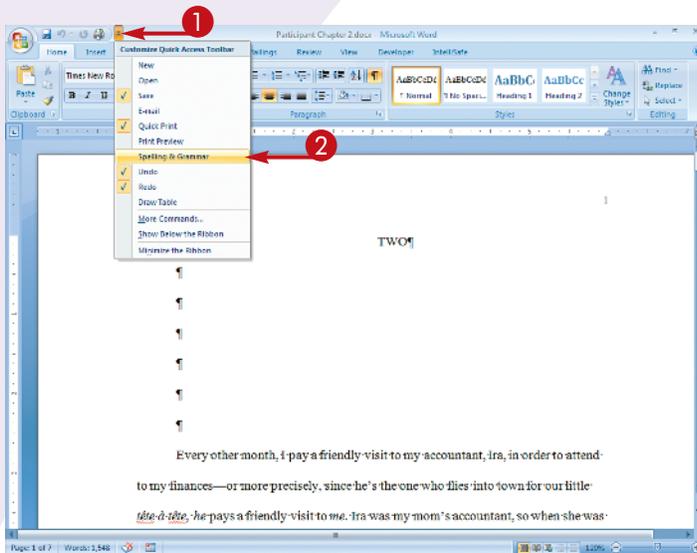
Customize the QUICK ACCESS TOOLBAR

The Quick Access toolbar provides easy access to often-used commands such as Save and Undo. You can customize the Quick Access toolbar to change which commands are available.

Office enables you to add commands to the Quick Access toolbar three different ways. One is to select the desired command from the Customize Quick Access Toolbar menu. Another is to use the *Program Name* Options dialog box. Finally, you can simply

right-click the command you want to add in the Ribbon and click Add to Quick Access Toolbar.

In addition to adding commands to the Quick Access toolbar, you can also move it from its default spot above the Ribbon to a spot below the Ribbon. To do so, click the arrow in the Quick Access toolbar and click Show Below the Ribbon from the menu that appears.



- 1 Click the arrow to the right of the Quick Access toolbar.

Office displays the Customize Quick Access Toolbar menu.

- 2 Click the command you want to add to the toolbar.

- A button for the selected command appears.

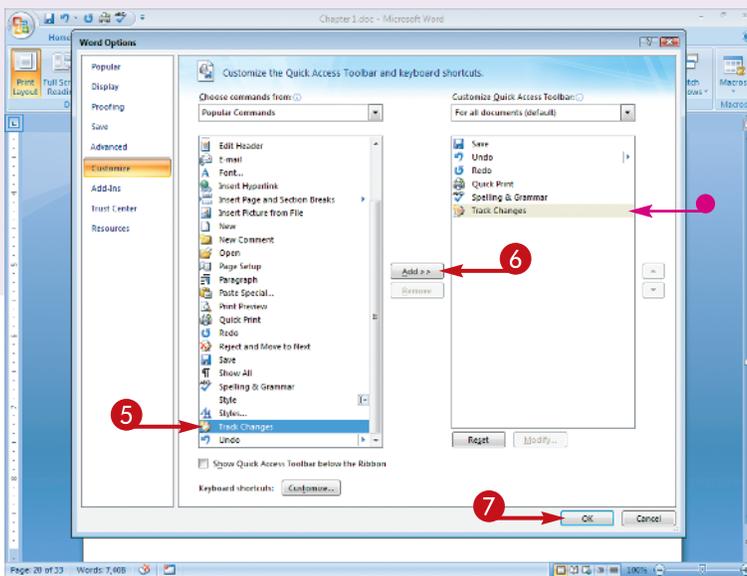
In this example, Spelling & Grammar was selected.

- 3 If you do not find the command you want to add, click the arrow to the right of the Quick Access toolbar.

- 4 Click More Commands.

#10

DIFFICULTY LEVEL



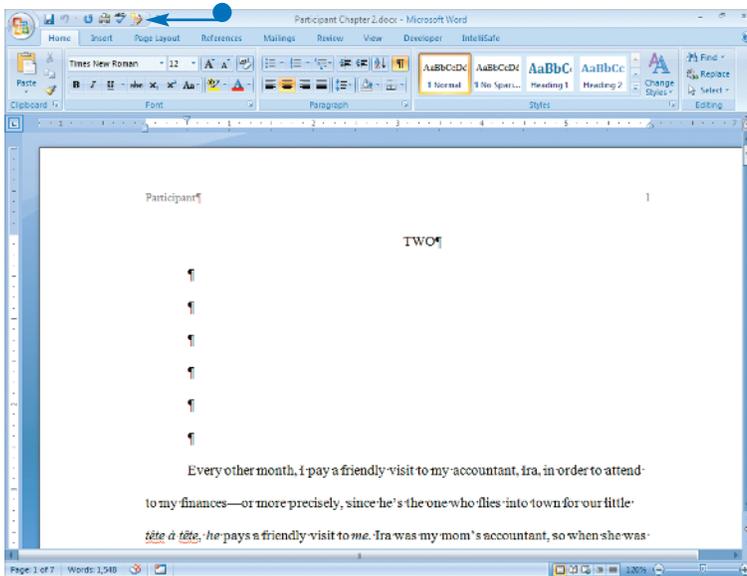
The *Program Name* Options window opens with Quick Access toolbar options displayed.

- 5 In the window's left pane, click the command you want to add.

Note: If the command you want to add is not displayed, click the *Choose commands* from drop-down arrow and select *All Commands*.

- 6 Click Add.
 - The command is added to window's right pane.
- 7 Click OK.
 - A button for the selected command appears.

In this example, Track Changes was selected.



TIPS

Did You Know?

You can add groups of commands in the Ribbon to the Quick Access toolbar. To do so, right-click the group name in the Ribbon and click Add to Quick Access Toolbar. The group is stored under a single button; click the arrow next to the button to reveal the available commands in the group.

Did You Know?

To apply the change to the Quick Access toolbar to the current document only, click the Customize Quick Access Toolbar drop-down arrow in the *Program Name* Options window and choose *For Document Name*.

Customize the RIBBON

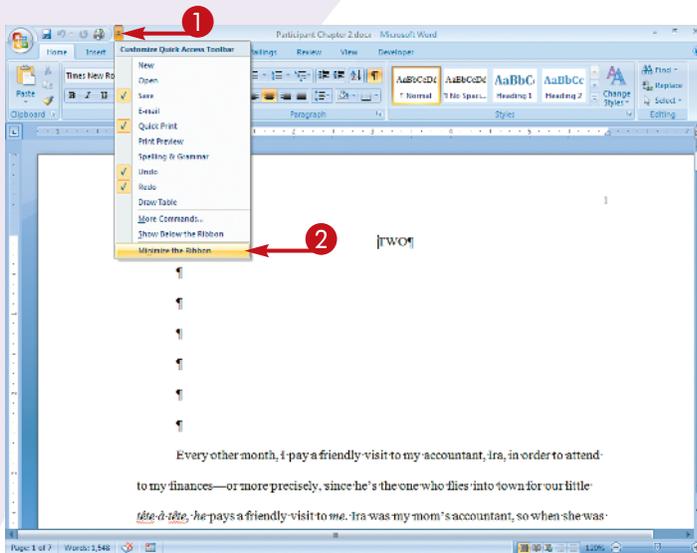
In lieu of using the traditional menu system and toolbars, Office 2007 features what Microsoft calls the *Ribbon*. The Ribbon is designed to enable you to find the command necessary to complete a task more quickly and more intuitively than the menus of old.

To this end, the Ribbon groups related commands together, placing them under clickable tabs. Each tab pertains to a certain type of task, such as formatting text, inserting items into a document, laying out a

page, reviewing a document, and so on. The tabs displayed depend on which Office program is open, and what type of task is being performed.

If you feel the Ribbon consumes too much space in your Office windows, you can minimize it, displaying it in full only when it is needed.

If you prefer, you can access the commands displayed in the Ribbon using your keyboard.

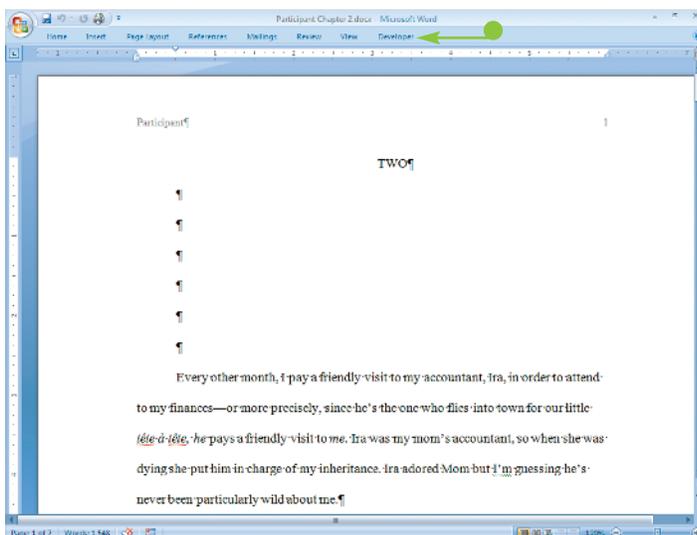


MINIMIZE THE RIBBON

- 1 Click the arrow button to the right of the Quick Access toolbar.

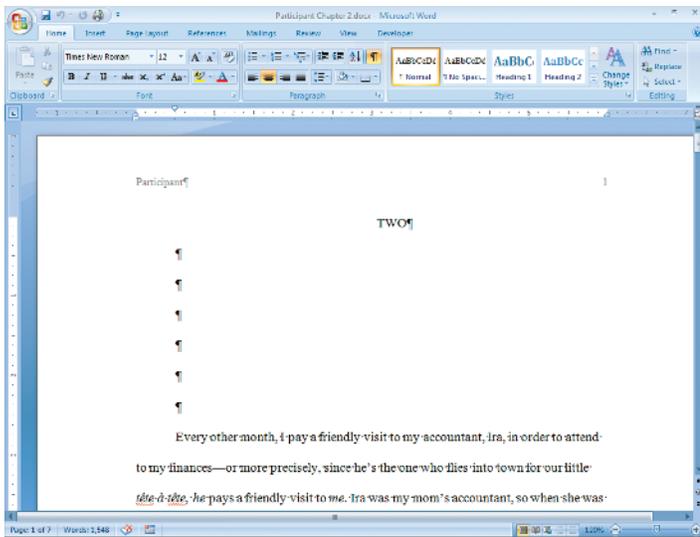
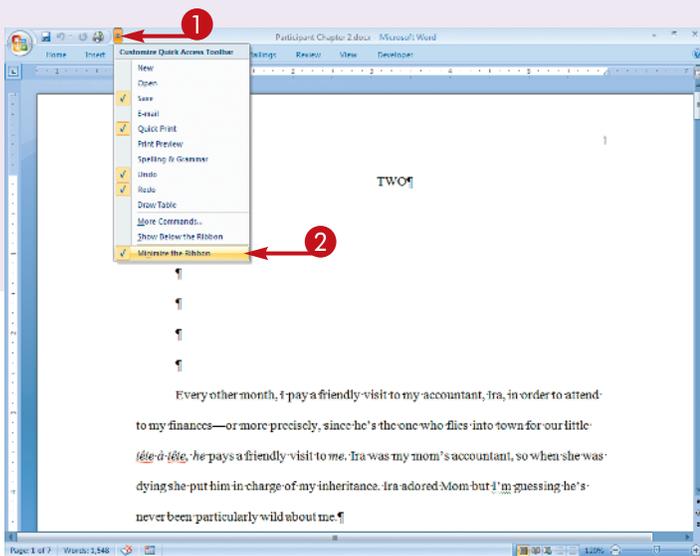
Office displays the Customize Quick Access Toolbar menu.

- 2 Click Minimize the Ribbon.



Office adds a check mark next to the Minimize the Ribbon command and minimizes the Ribbon.

- Notice that the Ribbon's tabs are still present; to reveal options in a tab, click it; to hide them again, click the tab a second time.



REDISPLAY THE RIBBON

- 1 Click the arrow to the right of the Quick Access toolbar.
- 2 Click Minimize the Ribbon.

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Office removes the check mark next to the Minimize the Ribbon command and displays the Ribbon in full.

TIPS

Try This!

To quickly minimize the Ribbon, double-click any of its tabs. To redisplay it, double-click a tab a second time.

More Options!

Just as the menus in older versions of Microsoft Office supported the use of keyboard shortcuts to execute various commands, so, too, does the Ribbon. To see what keyboard shortcuts apply, press and release the Alt key on your keyboard; Office shows *key tips*, which denote the key used in conjunction with the Alt key in the keyboard shortcut. (Note that pressing the key indicated by the key tip may reveal more key tips. For example, you might press Alt+N to switch to the Insert tab; when you do, Office displays key tips for the various commands located on that tab.)

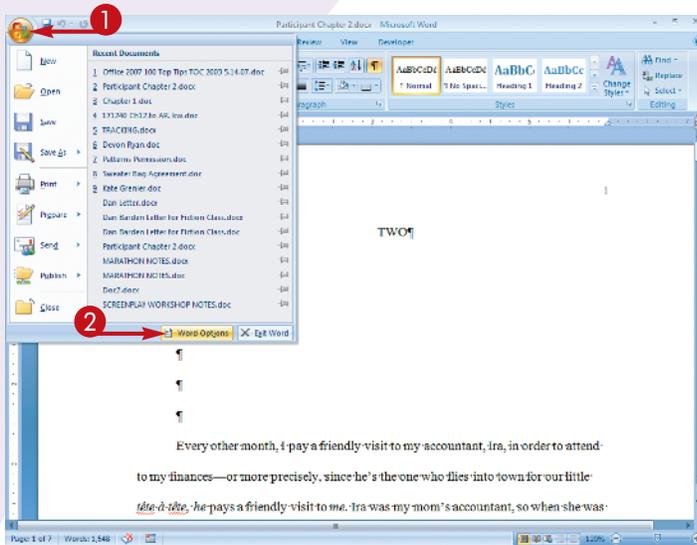
Change the SAVE SETTINGS

By default, Office saves your documents in your Documents folder (or, if you are using a version of Windows that precedes Windows Vista, the My Documents folder). You may find, however, that another folder is more suitable. For example, if you only create PowerPoint presentations for a particular client, you might configure Office to save PowerPoint files you create in the folder you have created for that client by default.

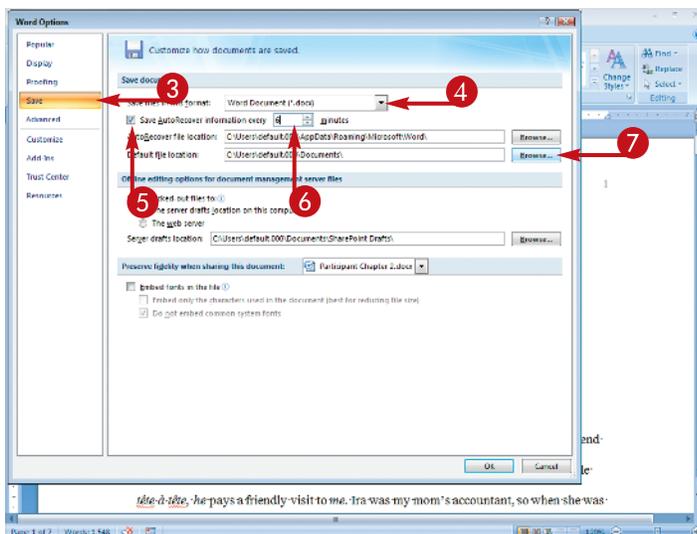
In addition to changing where Office stores your Word, Excel, PowerPoint, and other Office files by default, you can also specify what file extension

should be used. For example, suppose your Word files should be backward compatible by default. In that case, you can opt to save all files you create using Office 2007 in Compatibility Mode (that is, in Word 97–2003 format).

Assuming you want Office to auto-save your documents (recommended), you can also indicate how frequently the auto-save operation should occur. Auto-saving too frequently can slow your computer; auto-saving too infrequently can cause you to lose more data in the event of a system crash.



- 1 Click the Office button.
- 2 Click *Program Name Options*.



The *Program Name Options* window opens.

- 3 Click Save.
- 4 Click here and select the desired default file format.
- 5 Click here to save AutoRecover information (changes to).
- 6 Click the up or down arrow to increase or decrease the time between each auto-save operation.
- 7 Click Browse.

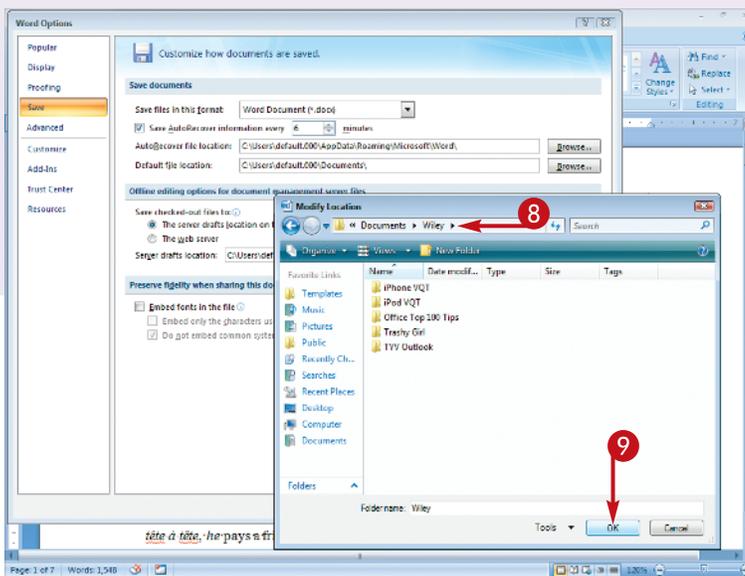
#12

DIFFICULTY LEVEL



The Modify Location dialog box opens.

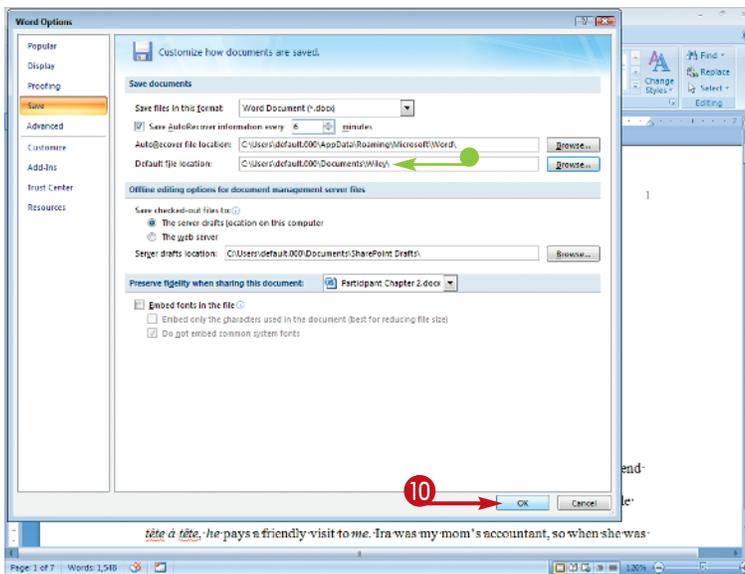
- 8 Open the folder in which you want to save documents created by this Office program by default.
- 9 Click OK.



- The folder you chose appears in the Default file location field.

- 10 Click OK.

The *Program Name Options* window closes, and your changes are applied.



TIPS

More Options!

To ensure that others who view your Word or PowerPoint document see it with the correct fonts, select the Embed fonts in the file check box in the *Program Name Options* window's Save screen. To reduce the size of your file, opt to embed font information for those characters used in the document only, and to *not* embed common system fonts. (This option is available for Word only.)

Try This!

If you want to change the author name that is associated with your documents, open the *Program Name Options* window and, in the Popular screen, type the desired name in the User Name field. Optionally, if using Word or PowerPoint, you can also change the author initials.