Office 2010 (and 2007) Tips That Your Folks Will Love

Office

Office Button is Gone!

The biggest challenge users faced when looking at Office 2007 was figuring out where to go to perform the most basic tasks - Open, Save, Print, etc. The Office

Button was **not** a resounding success as research found most users thought it was merely a logo and did not realize it had a function.

Backstage View

This is the area where you do things *to* a document (such as saving and printing or checking for metadata) rather than *in* document (such as editing text). Don't ignore this very powerful location!

1. Click the **File** tab .
2. The Backstage view displays a list of commands related to working with documents.
3. **Note:** Clicking the Close button (X) in the upper-right corner does not close the Backstage view as you might expect - it closes the document. Instead, select another Tab or press **Esc** on the keyboard to continue working with the open document.

Print Dialog Replaced

While we're Backstage, you'll notice that everything relating to printing is displayed simultaneously. You do not need to navigate a separate dialog box to make printing selections or to see a preview. This redesign is very intuitive.

Recover Unsaved Documents

Word, Excel and PowerPoint all have a new feature that saves documents that you didn't manually save when you closed them, including documents that you haven't given a name yet. This feature uses the AutoSave option to back up every 10 min. or whatever time interval you choose under Options.

To recover an unsaved document:

1. Click on the **File** tab, click on **Recent** and then choose **Recover Unsaved Documents**.
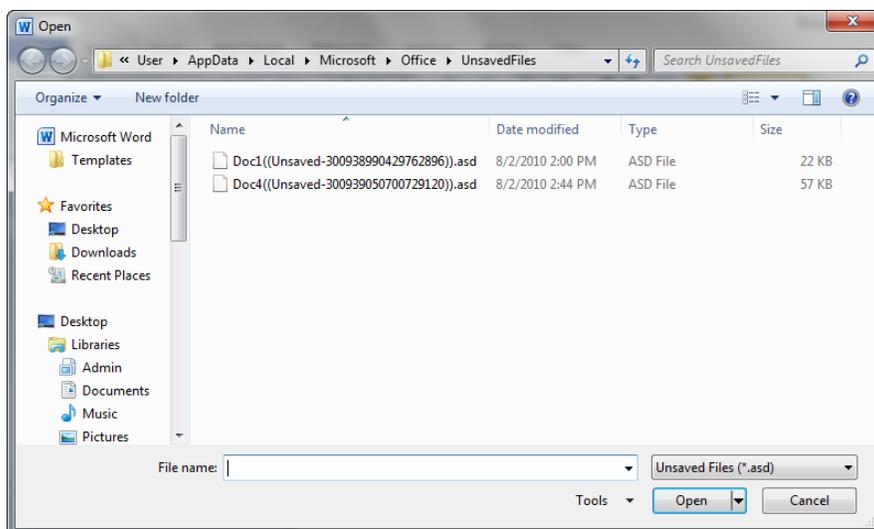
2.   Choose the document from the Open dialog box.

Ribbon Customization

One of the negatives often heard from power users regarding Office 2007 was the inability to customize the Ribbon. This has been addressed in Office 2010 and will bring joy to the hearts of millions! You may now create custom tabs and custom groups to contain your frequently used commands. Be aware, though, that Ribbon customizations do not apply across all Office applications - the changes you make in Word only appear in Word. If you want similar customizations in Excel, you must make those changes independently.

You may rename and/or change the order of the default tabs and groups. However, you cannot rename the default commands, change the icons or change the order of the commands. As we go through the process of creating and renaming groups, you will note that default commands appear in gray text and it is very apparent that they cannot be altered.

To add a command to a group, you must add a custom group to a default tab or to a new, custom tab.

1.   Click the **File** tab and choose **Options**.
2.   Click on **Customize Ribbon**.
3.   Working with the right-hand panel, rearrange the Main Tabs by selecting a tab and choosing the up or down arrow to reposition.
4.   Expand a Main Tab to display the various groups on the tab.
5.   Use the **New Tab** or **New Group** buttons to add to the Ribbon.
6.   Select an item and click the **Rename…** button to assign a new name.
7.   After creating a new Tab or Group, you may select commands from the left-hand panel and **Add** them to the selected Tab or Group.

Help Desk Consideration: Do you really want everyone renaming and reorganizing their ribbons and groups and adding custom commands? How will you support this?

Commands Not in the Ribbon

When customizing the Ribbon or Quick Access Toolbar, you may **Choose Commands from** a variety of groupings. A great place to look for a command is in the **Commands Not in the Ribbon** list. This lets you know immediately that you could have been searching in vain for hours to find where Microsoft hid your favorite command only to discover they didn't put it anywhere!

Minimize/Maximize Ribbon Button

In Office 2007, you may use the keystroke (**Ctrl+F1**), or right-click on the tab headings and choose **Minimize/Maximize the Ribbon**, or click in the **Customize Quick Access Toolbar** drop-down and choose **Minimize/ Maximize the Ribbon** to toggle the display between the full ribbon with commands view and tab headings only view.

In Office 2010, a shortcut icon has been placed to the right of the tab headings.

With the full Ribbon displayed, click on the **Minimize Ribbon icon** ⌃ . Only the tab headings will display, which provides more work space. To expand the Ribbon and display all commands, click the **Maximize Ribbon icon** ♡ .

Tip: One complaint we have often heard is that there is not enough screen space and new users want to recreate the familiar menu/toolbar look from prior versions. (We've found this especially true with senior partners and accounting staff for some reason!) We can simulate the look without losing any of the functionality of the new fluent user interface.

1. Customize the Quick Access Toolbar to include the favorite commands that users want (Save, Print, Font, Font Size, etc.).
2. Place the Quick Access Toolbar Below the Ribbon.
3. Minimize the Ribbon.
4. The user now sees a series of tab headings that look very similar to the old menu system. Below that are the favorite shortcut commands and an increase in work area.

KeyTips (2007) [*]

Press the **ALT** key and you will see the Alt key combinations for the Quick Access toolbar and the ribbon tabs. If you use one of the keyboard shortcuts to move to a ribbon, Word displays the Alt key combinations for the ribbon features.

Mini Toolbar (2007)

When you select text using the mouse, the Mini Toolbar appears by default. This allows you to apply some commonly used direct formatting (or a character style) to the selected text. If you do not wish to use the Toolbar, simply navigate away from it. The Mini Toolbar is not customizable and some people find it annoying or the firm may not want to promote the application of direct formatting.

To disable the Mini Toolbar:

1. Choose **[Application] Options** from the **Office Button** in 2007 or **Options** from the **File** tab in 2010.
2. Click **Popular** and then clear the "**Show Mini Toolbar on selection**" check box.

Contextual Spelling (2007)

Finally, a spell checker that "thinks"! Yes, the following sentence contains correctly spelled words... but they're not the right words: "Their are lots of ways to have a good thyme." Contextual Spell Check will help you avoid the misuse of words that has become pervasive as we have relied more heavily on Spell Check.

To activate Contextual Spelling:

1. Click the **Office Button** (2007) or the **File** tab (2010).
2. Select the **Options** button.
3. Click **Proofing** and place a checkmark next to "**Use contextual spelling**."

Customize the Status Bar (2007)

Users can choose from 20 pre-defined features/commands that appear on the Status Bar. The settings are stored and will appear each time the application is launched.

To customize the Status Bar:

1. Hover the mouse pointer over the Status Bar and perform a **right**-**click**.
2. Select an item from the list (a checkmark will appear).
3. Repeat the steps to deselect an item and remove it from the Status Bar.

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[*] Some features were introduced in the 2007 version of the Office Suite but they are worth mentioning and are noted here.

Capture ScreenShots

Microsoft OneNote comes with a built-in screen clipping utility which is now part of the Office 2010 Suite. You can capture any part of the desktop screen with one click. If you capture a web page with OneNote, the URL of the page is automatically added to the screenshot displaying the source of the screenshot.

To capture screenshots:

1.   Click on **Screenshot** in the Illustrations group on the Insert ribbon to capture screenshots of open windows or any portion of the desktop.
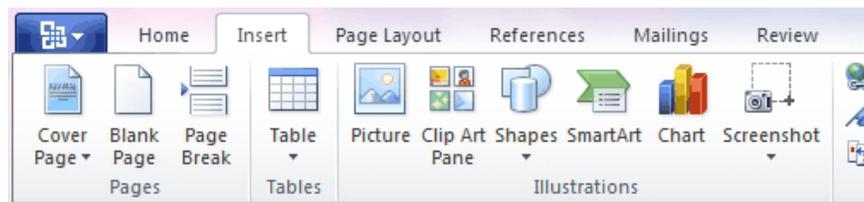
The screenshot gallery lets you create a new screen clipping as well as view all previous screenshot images that you have captured in Office 2010.

Built-In PDF Writer (2007)

You now have the ability to create PDF documents without purchasing a third-party program. In Office 2007, you must first download the PDF Writer from Microsoft's website (a free download). In Office 2010, the PDF Writer is already loaded with the software. The built-in PDF Writer has limited functionality, but will provide a standard, secure document for you to distribute.

To create a PDF of the active file in Office 2007:

1.   Click the **Office Button** and click the arrow to the right of **Save As**.
2.   Choose **PDF or XPS** (XPS stands for **XML Paper Specifications**, a platform-independent technology).
3.   Assign a name and location, choose among the options, and click **Publish**.

To create a PDF of the active file in Office 2010:

1.   Click the **File** tab and choose **Save & Send**.
2.   Click the **Send as PDF** button.
3.   The document will automatically be converted to PDF with the same file name (.pdf extension) and an e-mail message launched with the file as an attachment.

Note: If you merely wish to save the file to PDF format without sending:

1.   Click the **File** tab and choose **Save & Send**.

2. Click the **Create PDF/XPS Document** option under "**File Types**" in the Save & Send list.
3. Click the **Create PDF/XPS** button which appears in the right-hand panel.
4. Assign a File name and location using the Windows **Publish as PDF or XPS** dialog. From this location you may make additional choices by clicking the **Options...** button (e.g., deselect the **Document properties** to prevent them from being saved with the file). This is not as robust as a full-featured PDF Writer, but it gets the basic job done at no additional cost.

Quick Parts/Building Blocks (2007)

Quick Parts are reusable content that includes AutoText, fields, document properties, such as title and author, or any other text you create which are called Building Blocks.

To insert AutoText:

1. Click on the **Insert** tab.

2. Click on and choose **AutoText**.
3. Click on the entry you want to insert.
4. You can also type the first few characters of the AutoText entry and press **F3**.

To insert document properties:

1. Click on and choose **Document Properties**.
2. Choose the document property that you want to insert.

To insert a field:

1. Click on and choose **Field**.
2. Choose the field that you want to insert and click on **OK**.

To insert a building block:

1. Click on and choose **Building Blocks Organizer**.
2. Click on the Building Block you want to insert and click on **Insert**.

To create a building block:

1. Select the text that you want to save as a building block.

2. Click on **Save Selection to Quick Part Gallery**.
3. To display the building block on the Quick Parts Gallery, choose **Quick Parts** from the gallery drop-down list.
4. To save the building block as an AutoText entry, choose **AutoText** from the gallery drop-down list.
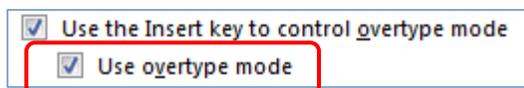
Word

Overtype/Insert Key (2007)

By design, the Insert key on the keyboard has been disabled to prevent inadvertent overtyping of text.

To use Overtype mode from the Status Bar:

1. Right-click on the Status Bar and select **Overtype**.
2. The "Insert" indicator signifies that text will be inserted at the cursor location.
3. Click on **Insert** to change it to Overtype mode.
4. When "Overtype" appears on the Status Bar, this indicates that text you type will overwrite existing content.

To activate the Insert key:

1. Select **Word Options** from the Office Button (2007) or the File tab (2010).
2. Choose the **Advanced** pane.
3. Under **Editing options**, select **Use the Insert key to control overtype mode**
4. Make sure to select the **Use overtype mode** check box.

Navigation Pane

Word's navigation pane, which was formerly the Document Map has been enhanced so that you can now move sections of a document simply by dragging the headings up and down the pane. You can also right-click the heading and choose other actions from the menu, including deleting the whole section.
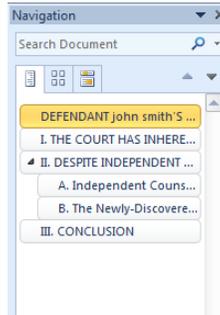
Browse Search Results

The new Find displays every instance of the text that was searched for, along with a few words of context, in boxes in the navigation pane. Click in one of the boxes to select that instance of the text. For keyboard shortcut users, you can press **Shift+F4** to move from one search hit to another even after the navigation pane is closed.

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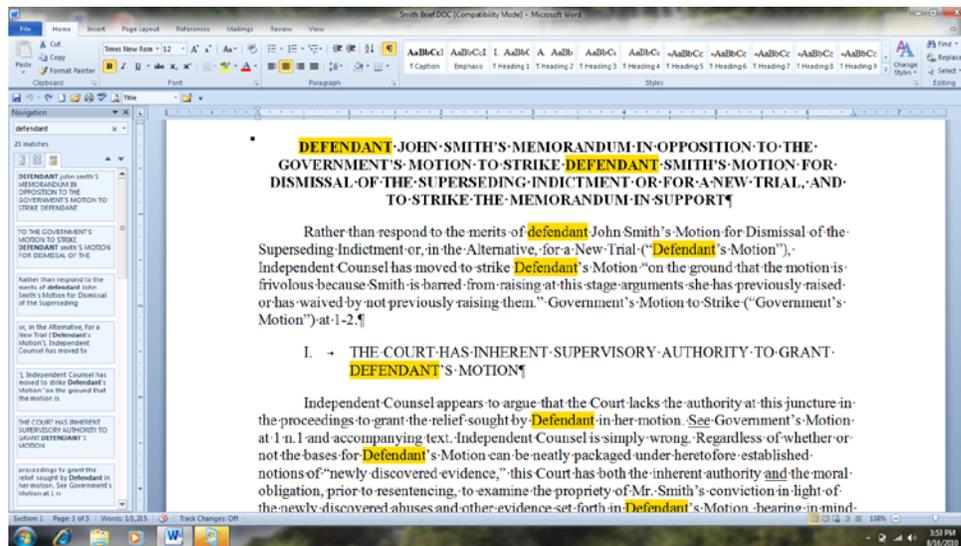
Artistic Effects

In Word 2010, new artistic effects have been added.

To apply an artistic effect:

1. Select the image and click on **Artistic Effects** on the Picture Tools ribbon. Live Preview shows you what the image will look like when you hover over each effect.
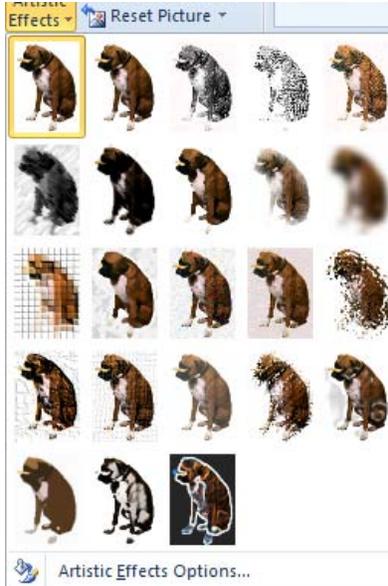
2. Click on the effect you want to use.

Using Paste Preview

You can now see a preview of the cut or copied text before pasting into a document.

To use paste preview:

1. Click over the area into which you want to paste and click on the bottom half of the **Paste** button.

2. Hover over to preview and keep source formatting.

3. Hover over to preview using merge formatting. The pasted text is formatted as the destination document.

4. Hover over to preview using keep text only. This removes all formatting and reverts to the Normal style.
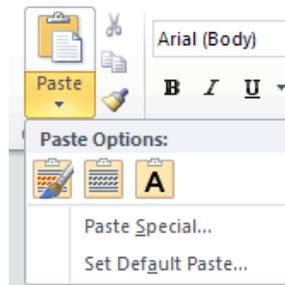
Linked styles (2007)

The new style type enables a style to be used as both a paragraph and character style. This is very useful when creating a table of contents with run-in headings. This eliminates the need for using the style separator.

To use a linked style as a character style:

1. Select the heading or text that you want to apply the style to and click on the linked style in the Styles pane, Style Quick Style gallery or Style drop-down list.
2. To make the rest of the paragraph another style, select the paragraph and click on the style.

Style Sets (2007)

After going through the labor-intensive task of creating a Multilevel List or other customized style-based formatting, save this customization as a **Quick Style Set** so that you can easily use it in other documents.

To save a Quick Style Set:

1. Make sure all Styles you plan to use are in the current document or template.
2. Click the **Change Styles** drop-down on the Home Ribbon.
3. Click **Style Set** and choose **Save as Quick Style Set**.
4. Type a **Name** for the Quick Style Set and choose **Save.**

To apply a Quick Style Set:

1. Click the **Change Styles** drop-down on the Home tab.
2. Click **Style Set** and select the **Quick Style Set** you want to use. If Live Preview is active, you may hover over the Quick Style Set name before applying it to see how the changes will affect your document.

Opening blocked file types

In Word or Excel 2007, if you tried opening a document created in an earlier version you received an error message because the document was regarded as a security risk.

To open blocked file types:

1. In Word or Excel, click on the **File** tab, click on **Options** and then click on **Trust Center**.
2. Click on **Trust Center Settings** and then choose **File Block Settings**.
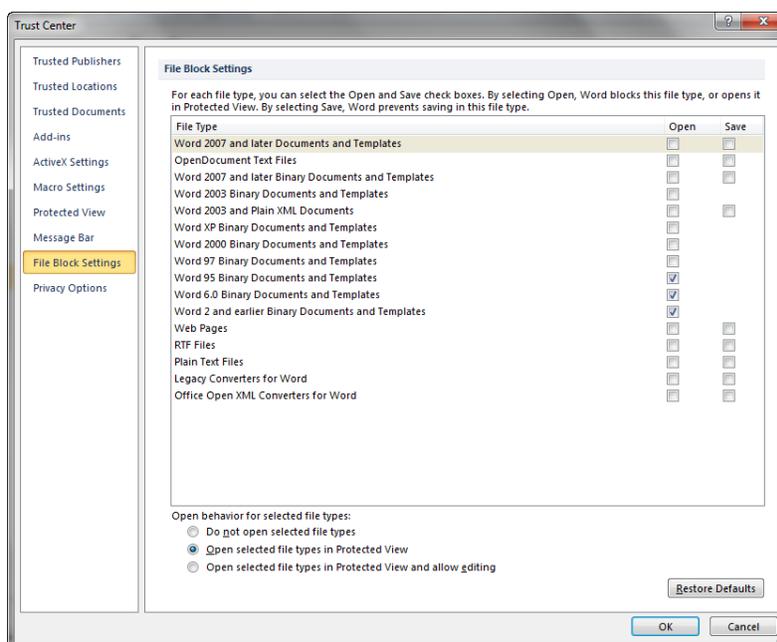
3. Remove the checkmarks from the older versions of the Word or Excel files you want to open.

Recover Text from Any File (all versions)

While this command is NOT new, we feel it worth mentioning that it still exists. The **Recover Text from Any File** command may permit you to open a corrupt document in order to extract the text. In addition, it also permits others to open the file and view any existing metadata, including all Styles, Authors, Editing Time, etc.

To Recover Text from Any File:

1. Click the **Office Button** (2007) or the **File** tab (2010).
2. Choose the **Open** command.
3. From the **Files of type** drop-down in 2007 or the list of file types next to the **File name** box in 2010, select **Recover Text from Any File**.
4. Choose the file you wish to open and click **Open**.

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Outlook

Protected View for Attachments

How many times have your users opened an e-mail attachment and started making changes, thinking they're editing the original file they sent out? Once they have made revisions, they have a difficult time finding the file in a "Temp" directory. Outlook 2010 opens the file with a **"Protected View"** banner across the top. Users are prompted to **Enable Editing** if they want to work with the file in its current location. Otherwise, they should perform a **Save As** or **Compare** the file. The new and exciting issue here is the message that reminds them they are working on the e-mailed document.

Customizing Predefined Quick Steps

Outlook introduces Quick Steps in Outlook 2010 which allow you to perform multiple steps in one click. Outlook 2010 has a number of predefined quick steps. In Outlook 2010 most of the quick steps are empty.

To customize a predefined quick step:

1. Click on the down arrow key in the Quick Steps group and choose **Manage Quick Steps**.

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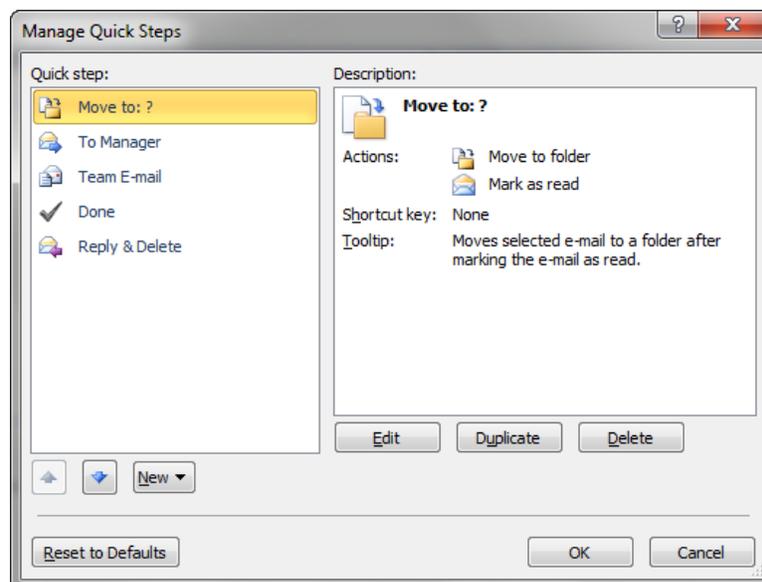
2. A new dialog box pops up displaying a list of predefined quick steps. You can rearrange the order of the quick steps by clicking on the up or down arrows.
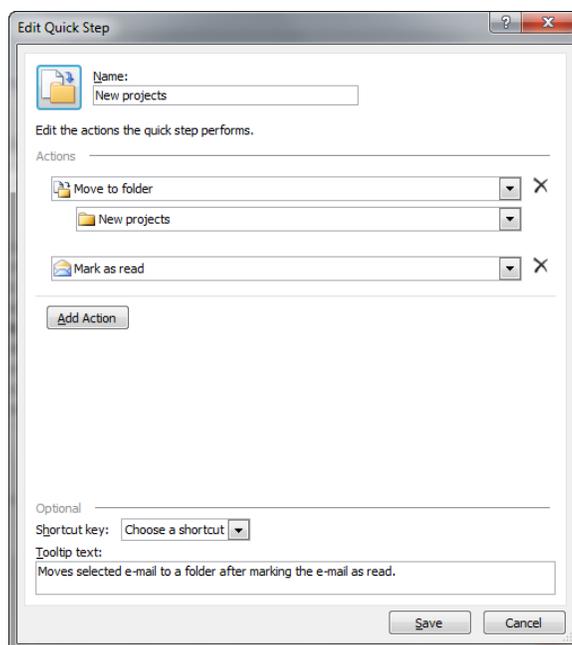
3. To modify a quick step, click on **Edit**.
4. Type the name, action that you want to apply and specifics for the action.
5. Click on **Show Options** to add additional actions to the quick step.

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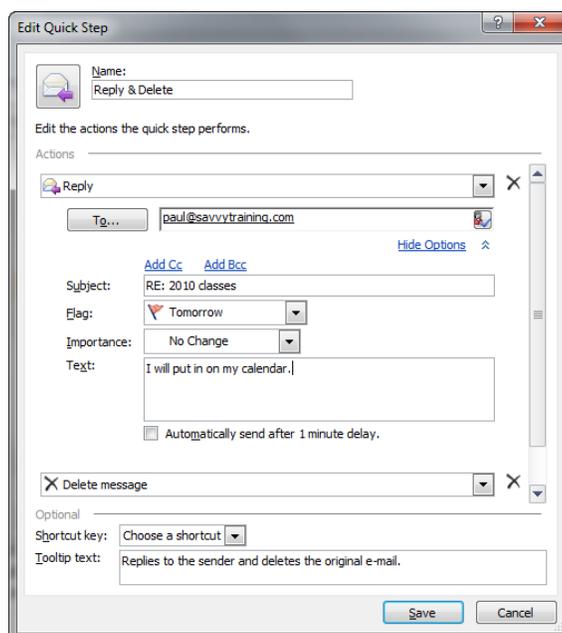
6.	You can also add multiple actions to be performed by the same quick step. Click on **Add Action** to include the additional actions.
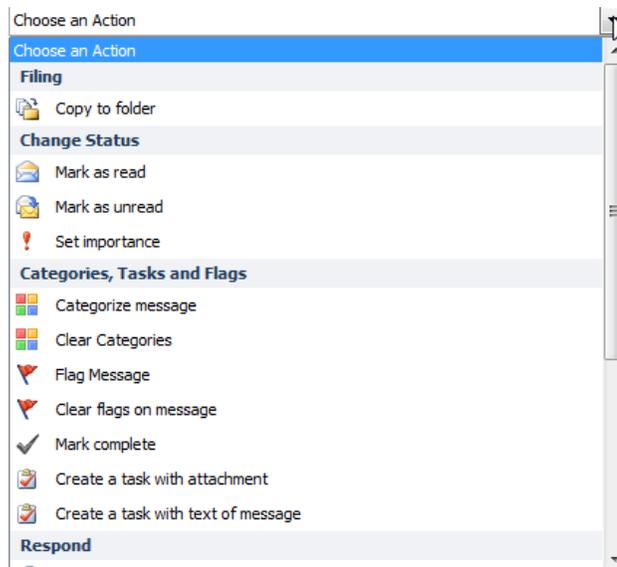
7.	Click on **Save** to save the changes.

Creating New Quick Steps

To create a new quick step:

1.	Click on **Create New** in the Quick Steps group.
2.	Type the name, action that you want to apply and specifics for the action.
3.	Click on **Show Options** to add additional actions to the quick step.
4.	You can also add multiple actions to be performed by the same quick step. Click on **Add Action** to include the additional actions.

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5.   Click on **Save** to save the changes.

Conversation Threads

You can reduce the number of messages in your mail folders with the Conversation Clean Up feature. Redundant messages within a Conversation are move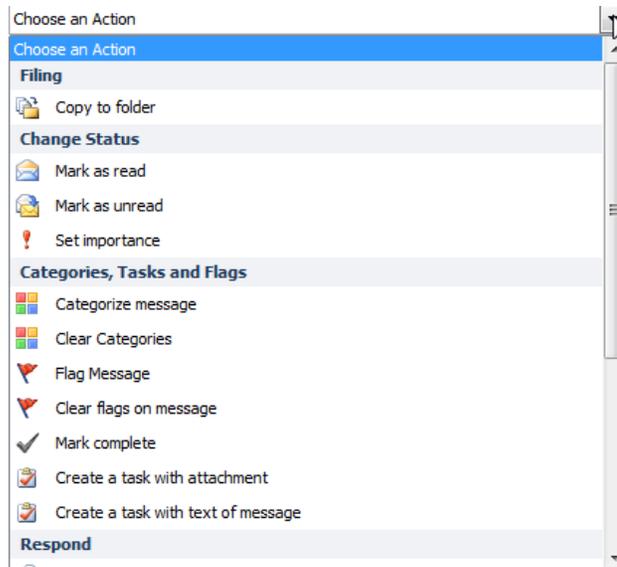d to the Deleted Items folder. A Conversation is the complete chain of e-mail messages from the first message through all responses. All messages in a Conversation have the same subject. If a message is completely contained within one of the replies, the previous message is deleted.

To remove redundant messages:

1.   On the **Home** tab, click on **Clean Up** in the **Delete** group.
2.   Click on **Clean Up Conversation** to review the current Conversation and delete redundant messages.
3.   Click on **Clean Up Folder** to review all Conversations in the selected folder and delete redundant messages.
4.   Click on **Clean Up Folder & Subfolders** to review all Conversations in the selected folder and any subfolder contained therein and delete redundant messages.

Ignore Conversations

While looking at e-mails in Conversations View, which groups messages and replies under a single heading, you can right-click on the Conversation and choose **Ignore**.

An advisory message appears alerting you that the selected message and all future messages <u>will be moved to the Deleted Items folder</u>. Only choose **Ignore Conversation** when you are certain that the topic has been fully exhausted!

Outlook Social Connector

The jury is still out on this one, but you need to start thinking about how it will impact your firm. The Outlook Social Connector connects Outlook 2010 to your business and personal social networks. From within Outlook, you can stay up to date on the status and activities of your contacts, whether they are from your firm's network or from social networking sites on the internet.

To start using the Outlook Social Connector:

1. By default, this feature is minimized and appears in Outlook 2010 as a single line at the bottom of the **Reading Pane**.
2. Click and drag the top of the minimized pane until it is the size that you want.
3. You must download and install a provider add-in for each internet social network that you want to use.
4. To connect to additional social networks, on the **View** tab, in the **People Pane** group, click **People Pane** and then click **Account Settings**.

To hide the Outlook Social Connector:

1. On the **View** tab, in the **People Pane** group, click **People Pane** and then click **Off**.
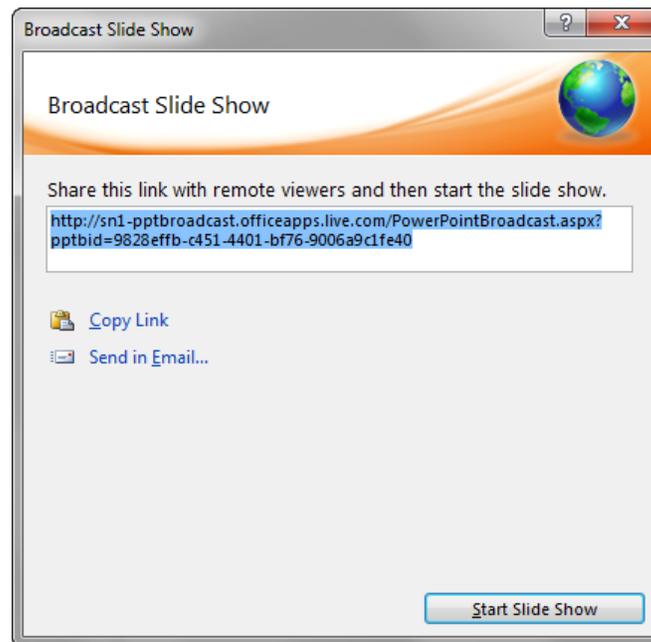
PowerPoint

Broadcast a slide show

To broadcast a slide show:

1. Click on the **File** tab, choose **Save & Send** and then **Broadcast Slide Show**.
2. Click on **Broadcast Slide Show** and click on **Start Broadcast**.

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3. The first time you use this feature, you need to login to Microsoft's free broadcast service using a Windows Live ID but you can login automatically in the future.
4. When the broadcast is ready to send, a dialog box displays a **Send in Email** link which can be used to send an invitation link to the attendees.

5. To start the broadcast, click on **Start Slide Show**.

Remove Background from an Image

If you need to remove an image background in Word or PowerPoint, you can now do that in 2010.

1. Click on the **Insert** tab and click on **Picture** or **Clipart** and choose the image to insert.
2. Click on the **Picture Tools** contextual tab and click on **Remove Background**.
3. The background for the image is removed.

Video Editing

You no longer need video editing software to correct and trim videos which are played within PowerPoint.

To include a video, click on the **Insert** tab and choose the **Video** drop-down. Select one of the options (from File, from Web Site, or Clip Art). Navigate to the location of the video and select it for placement on the current slide.

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To edit a Video:

1.   When a video is inserted on a slide, the Video Tools tabs appear.
2.   Click the **Format** tab to make corrections such as adjusting brightness, adding a border, or containing the video inside a particular shape (such as a circle).
3.   Click the **Playback** tab to access the **Trim Video** command.
4.   The **Trim Video** dialog opens and allows you to set new start and end times for the current video. You may eliminate extraneous introductory information at the beginning or ending of a presentation, for example.
5.   Click and drag the green marker to the location on the timeline where the video should begin and click and drag the red marker to the new location for the end of the video.
6.   Click **OK** when done and the video has been edited for use within PowerPoint.

Additional Font Effects

All of the Office applications have enhanced Font Effects on the Home tab, but this is particularly useful in a visual program like PowerPoint. Select an effect from the **Font** group or click the dialog launcher to display the full Font dialog.

Visual Effects

PowerPoint 2010 has some exciting new **Transitions** and **Animations**. Click on the appropriate tab and browse the gallery.

The addition of a separate **Transitions** tab has greatly increased the ease with which these elements can be applied.

To add **Animations** to a selected object:
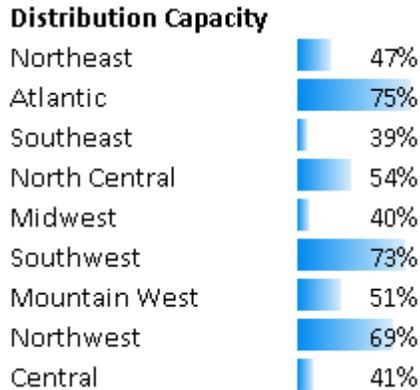
1.   Select the object.
2.   Click on the **Animations** tab.
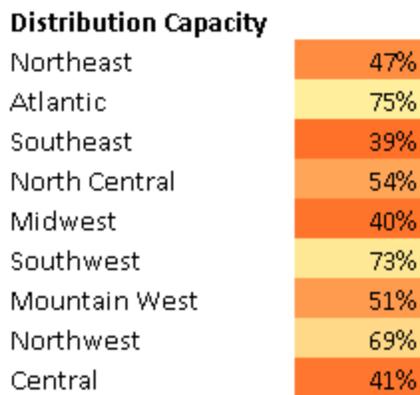3.   Select the **Add Animation** button.
4.   Choose an effect.

Excel

Conditional formatting (2007)

You can now create three new types of conditional formats--data bars, color scales, and icon sets. Data bars summarize the relative value of a cell range by extending a band of color across the cell.

Distribution Capacity

Region		Value
Northeast		47%
Atlantic		75%
Southeast		39%
North Central		54%
Midwest		40%
Southwest		73%
Mountain West		51%
Northwest		69%
Central		41%

Color scales compare the relative value of a cell range using colors from a two- or three-color set. The intensity of a cell's color reflects the cell's value toward the top or bottom of the range.

Distribution Capacity

Region	Value
Northeast	47%
Atlantic	75%
Southeast	39%
North Central	54%
Midwest	40%
Southwest	73%
Mountain West	51%
Northwest	69%
Central	41%

Icon sets are collections of three, four or five images that displays in cells when certain rules are met.

Distribution Capacity

| Region	
Northeast	🔴
Atlantic	🟢
Southeast	🔴
North Central	🟡
Midwest	🔴
Southwest	🟢
Mountain West	🟡
Northwest	🟢
Central	🔴

When you click on a color scale or icon set in the Conditional Formatting Rule Manager, you can click on **Edit Rule** to determine when Excel will apply a color or icon to the data.

Sparklines

Sparklines are small, cell-sized charts that fit in a cell to provide a quick visual representation of the accompanying data. They show trends in a small amount of space and are especially useful on devices where you need to show a snapshot in an easy-to-understand visual format.

The graphic below displays the usefulness of adding **Conditional Formatting** and **Sparklines** to explain raw data.

Sales By Department for May 2010
(sales in millions)
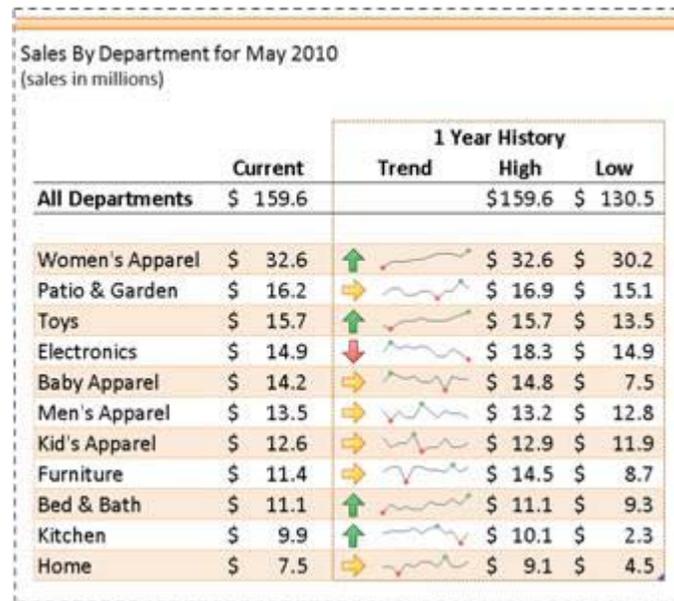
	Current	Trend	1 Year History High	Low
All Departments	$ 159.6		$159.6	$ 130.5
Women's Apparel	$ 32.6	⬆	$ 32.6	$ 30.2
Patio & Garden	$ 16.2	➡	$ 16.9	$ 15.1
Toys	$ 15.7	⬆	$ 15.7	$ 13.5
Electronics	$ 14.9	⬇	$ 18.3	$ 14.9
Baby Apparel	$ 14.2	➡	$ 14.8	$ 7.5
Men's Apparel	$ 13.5	➡	$ 13.2	$ 12.8
Kid's Apparel	$ 12.6	➡	$ 12.9	$ 11.9
Furniture	$ 11.4	➡	$ 14.5	$ 8.7
Bed & Bath	$ 11.1	⬆	$ 11.1	$ 9.3
Kitchen	$ 9.9	⬆	$ 10.1	$ 2.3
Home	$ 7.5	➡	$ 9.1	$ 4.5

To create a sparkline:
1. Select an empty cell or group of empty cells in which you want to insert sparklines.
2. On the **Insert** tab, in the **Sparklines** group, click the type of sparkline that you want to create: **Line**, **Column**, or **Win/Loss**.
3. In the **Data** box, type the range of cells that contain the data on which you want to base the sparklines.
4. The **Sparkline Tools** appear. Choose the **Design** tab.
5. Choose one or more commands to format the appearance of the Sparklines.

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Top Tips for "Selling" Your Firm on Upgrading to Office 2010

Customize the Ribbon

- The ability to Customize the Ribbon is going to save the firm LOTS of programming time and/or expense.

Building Blocks

- Building Blocks encourage standardization and decrease the need to retype, reformat, and reinvent repetitive information.

Built-In PDF Writer

- No extra "per user" license is needed to provide a PDF Writer to everyone in the firm. No, it doesn't have the options that a third-party application contains… but it comes at no additional cost. There's definite value there!

Improved Document Compare

- This is a built-in feature that has been greatly improved since earlier versions of Word. This should be explored to determine if a third-party application for Comparisons is still needed.

Sparklines in Excel

- When analyzing data for trends (monthly or quarterly income, billings for each department, etc.), a picture is truly worth a thousand words. The ability to place a very small graphic image of the data in an accompanying cell turns a lot of numbers into a visual representation that can save hours of manual analysis. It's easy to use and no programming experience (or formula writing) is needed.

Thank you for attending our session. If you have any questions, feel free to contact us: Terry@SavvyTraining.com or Cheryl@SavvyTraining.com. You've already figured out that if the question is "technical," it's going to Cheryl!

For information about training for your firm, please contact your Savvy representative:

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