

Applied Systems Client Network

SEMINAR HANDOUT

INTRODUCTION TO OFFICE 2007

ASCnetTM

Prepared for ASCnet

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Objective: Introduce users to Word, Excel and Outlook versions 2007 and highlight some of the enhancements in the new version that will increase efficiencies in the agency.

Assumptions: This seminar is based on the following
Microsoft ® Word Version 2007

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Office 2007 – Things they are a changin’

Microsoft has made some sweeping changes to the User Interface (that’s the part of the software a user sees) in their newest version of Office – version 2007. Many of the changes are great improvements, however it can be frustrating to work with initially because so many things have been changed or moved. The goal of this class is to introduce some to the bigger changes in the overall Office program and then specifically focus on Outlook, Word and Excel enhancements.

General Office Features (shown in Word)

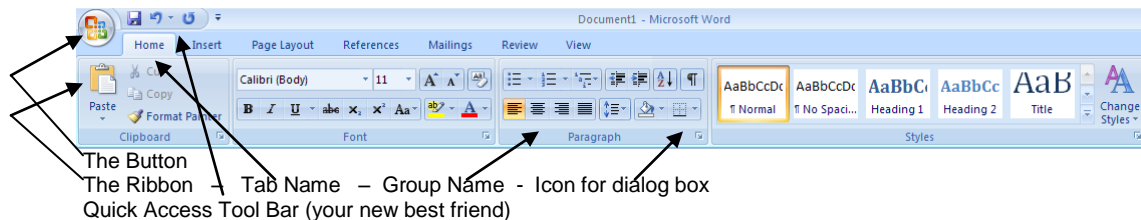
There are certain features that transcend all the programs in Office Standard 2007 and those features are what this section is all about – the general Office 2007 features.

Office Fluent user interface

Microsoft has decided to give their new user interface a name... Office Fluent. With this version they have designed a somewhat standard look and feel to the office products and acknowledged that the features displayed will change depending on what application you are in and what you have highlighted at the time.

Office Button

Think of this as old reliable. A familiar looking menu appears when you click on the big button in the upper left hand corner. From here you can Save, Print and Send your document to various places - to name a few of the options. This is also where you find the old Tools, Options dialog box, except now you click on the Button then Options button in the lower right hand corner. This button is not available on all screens in the current version of Outlook.



The Ribbon

The Ribbon replaces your old toolbars. They are organized by task on tabs which are labeled *above* the commands. (The Home tab contains many of the “commonly used features”.) Each tab is then broken down into groups, which are labeled underneath the commands. To see more details for a set of commands simply click on the icon to the right of the group name and a detailed dialog box will open. The Ribbon is not available on all screens in the current version of Outlook.

Quick Access Toolbar

Your new best friend! This customizable toolbar allows you to add your FAVORITE buttons from any ribbon to this easily accessible location. Simply right-click on the button you like and choose Add to Quick Access Toolbar. Decide you don't like a button that is already on the Quick Access Toolbar, just right-click on the button and choose Remove from Quick Access Toolbar.

Live Preview

This is really cool, but is not available for all commands – which can make it a bit difficult to get used to. On the most basic level, the way this feature works is, if you hover over a button with your mouse – but do not click – you will see that command applied to your document in a preview state. If you like the changes, simply click the button and the changes will be permanent. If you don't like the changes, hover over another button. Some of the commands that WILL live preview are Styles, Fonts and Colors (if chosen from the expanded box). Some of the commands that WILL NOT live preview include Bold and Italics.

Export to PDF or XPS

PDF and XPS are two file formats that preserve document formatting and Office 2007 will allow you to export to either format without purchasing any additional software. Before you can start using this feature, a free “add in” must be installed on your workstation which is available from Microsoft's website – www.microsoft.com/downloads then type in “save as pdf or xps” in the search box and you will be brought to the 2007 Office Add-in for this feature. Once installed, you find this option in the Office Button, under the Save As command.

Spell Check

Many of the spell check options are now global across all your Office applications. That means if you make a change to the spell check options in Word – that change may be picked up in Outlook too. (Notice the words many and may in the previous sentences... unfortunately it's not all options – and there's currently not a clear list of which options are global. We do know that the custom dictionary IS global!)

An exclusion dictionary is available in the Office suite. This is a manual process, but is great for catching embarrassing typos...like if you forget to type the L in public. The way the exclusion dictionary works is you enter, in all lower case with a hard return after each entry, the words that you want flagged as exclusion. After you have saved and closed the document and restarted your Office programs, whenever one of the exclusion words are typed they will get a red squiggly line underneath them, indicating to the user that the word has been misspelled. The exclusion dictionary file can be found on a workstation in the following location.

C:\Documents and Settings*username*\Application Data\Microsoft\UProof

Contextual Spell Check

Another option in Office 2007 is Use Contextual Spelling. This feature will look for the classic – I will see you THEIR! - typos. To turn this feature on or off go to Office Button, Options (in the lower right hand corner), Proofing. This is also where you find all the AutoCorrect options and many other familiar friends.

Outlook

If you are coming from Outlook 2003, the user interface for 2007 is not THAT much different than what you are used to today. If you are coming from an older version, the look and feel is quite new. Below are some of the new features in Outlook 2007.

To Do Bar

This is the new area for your quick view of the priorities for the day. It can display tasks, emails flagged for follow-up, and upcoming appointments to name a few. It is found on the right side of your Outlook window. You can customize its look and feel by right clicking on it. There are three views available – Off, Minimized and Normal. The minimized view is displayed on the right.

Instant Search

Instant Search is a quicker way to search Outlook for information. Natively available in Office 2007 running on Windows Vista, Windows XP users can take advantage of this feature by downloading the Windows Desktop Search add-in from Microsoft's website (www.microsoft.com/downloads) and typing in Windows Desktop Search in the search window. Once installed, you can search for a word or phrase and easily expand your search to your entire mailbox.

Tasks on Your Calendar

Outlook 2007 now integrates Tasks with your Calendar. When a task is entered in 2007 it will appear on your Daily Task List on your calendar, so you will no longer need to go to the task window to see your pending tasks. The great part about this feature is your task will continue to “move” to the next day's calendar until it is marked as completed.

Color Coding

Outlook has given the ability to color code items in Outlook for several versions, and 2007 now gives us MORE capabilities. With Color Categories, you will now be able to add the same color to e-mail, calendar and task items. The first time you use a Color Category, you will be given the option to rename the category from its original color name to something more meaningful. To assign a Color Category, simply right click on your Outlook item and choose Categorize, then the appropriate color. If you are feeling really fancy, explore the Quick Click option!



To-Do Bar
Outlook 2007

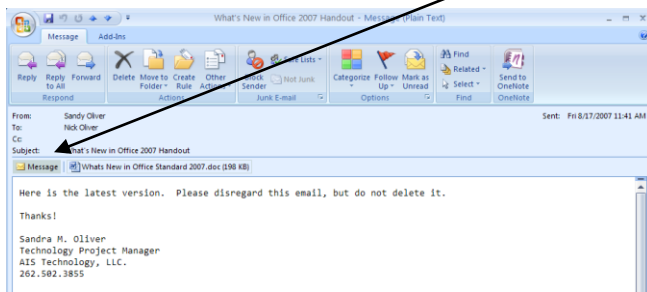
You also have the ability to search on Color Category and if you have an Exchange Server your Color Categories will now roam with you. (In previous versions they were stored in the local registry but they are now in your server default data file.)

Attachment Previewing

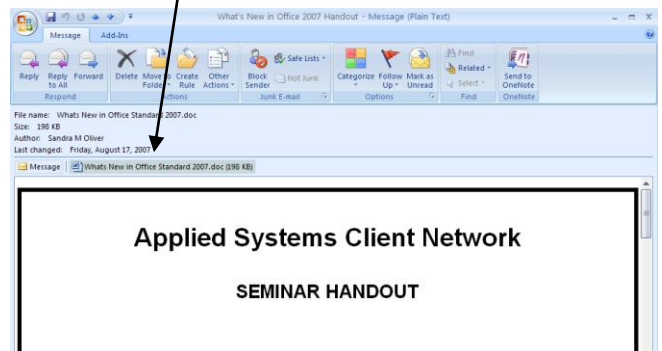
Attachment Previewing gives you the ability to quickly see an attachment in the reading pane of Outlook. Natively, Outlook can preview Outlook, Word, Excel, PowerPoint, Visio, text and image files. Other third party manufacturers (like Adobe) have introduced preview capabilities in their newer versions of software or via patches. You will need to contact those manufacturers for details. Macros and other scripting type features are disabled in Preview due to the risk of virus proliferation.

Previewing an attachment is easy, just click on the attachment tab at the top of the body of the message. To switch back to the e-mail message, click on the Message tab. Below you can see both views.

Message View



Attachment Preview



A word of caution when using the attachment previewing feature!

If you want to PRINT an attachment in an e-mail...

either right-click on the attachment in the e-mail message and choose print

OR

double-click on the attachment in the e-mail, opening it, and then print from that screen.

If you simply click once on an attachment and review that attachment using the attachment preview and then click on the Print button in the e-mail window, you will print the BODY OF THE E-MAIL, even though what you are looking at the body of the attachment!



Navigation Pane Minimization

In Outlook 2003, the Navigation Pane on the left side of the Outlook window changed dramatically. In 2007, that pane hasn't changed too much, but one really great feature was added... the ability to minimize the Navigation Pane! Minimizing this pane gives you the ability to have a much larger workspace in Outlook 2007. When minimized, you can still move between the different areas in Outlook. To switch between Normal and Minimized views, click the chevron at the top of the pane. An image of the minimized pane is shown of the left.

Meeting Requests

Several enhancements have been added to the meeting scheduling area of Outlook 2007. You will no longer be able to send an out of date meeting request – Outlook will automatically send the most current if you try. Also, if a change is made to a meeting's location or agenda by the organizer, everyone will receive an *informational* update - they will NOT receive another meeting request, so they won't have to accept the meeting again. Changes will be highlighted in the informational update, so that attendees can more easily see the changes made by the meeting organizer.

Calendar View Updates

Calendar views and features have also been enhanced.

You now have the ability to send someone a snapshot of your calendar via email. To do this you must start with your calendar visible. In the Normal Navigation Pane, click Send Calendar via E-mail. You will then be able to enter an e-mail address and specify how many days you want to send. Please note, the recipient gets a point in time image of your calendar, they will not receive any changes after you send the e-mail.

Another new feature is Calendar Overlay. This feature allows you to combine multiple calendars together – for viewing purposes only. To overlay two calendars, you must have view access to both. From your calendar, put a check mark in the Navigation Pane next to the calendars you want to merge, the calendars will appear side-by-side. In the name tab of the secondary calendar, click the View in Overlay Mode button. If you want to overlay more calendars, repeat the steps above for each calendar. To separate the calendars, click on the calendar's name tab and choose View In Side-by-Side mode.

Out of Office Schedule

If you have an Exchange Server running version 2007 you can now schedule your Out of Office Assistant ahead of time! To do this open the Out of Office Assistant and choose Send Out of Office Auto-Replies. Next choose Only Send During This Time Range and enter the range of the next time that you will be out of the office. When that time arrives, the server will automatically start sending whatever out of office message you entered. But remember, this is only available with Outlook 2007 AND Exchange 2007.

Retired Features

Now it's time to say good-bye to some retired features.

Personal Address Book – has been replaced with Contacts.

Flag Follow-up – was only in Outlook 2003 – is being replaced by task flags and the enhanced color categories.

Word as Your Email Editor – you now have no choice... you must use Word as your email editor.

Task Pad – has been replaced with the To-Do Bar.

Excel

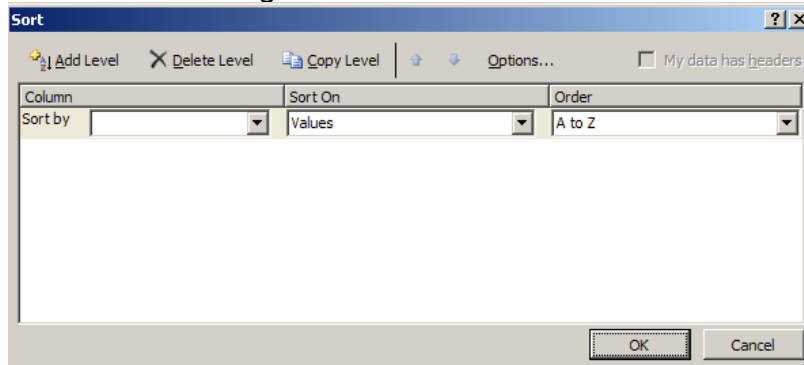
Most of the new features in Excel involve improving engines of existing tools within the program. It's not exactly hot off the press stuff, but it is much needed by those that use the tools.

Expanded Grid

First and foremost, Microsoft expanded the grid size in 2007 to 1,048,576 rows by 16,384 columns! That is going to help A LOT with those big searches we all run!

Sorting

The ability to sort has been dramatically expanded in this version. Instead of having 3 levels, you can now have up to 64 levels and you can now sort by color and custom list. See the Sort dialog box below. Look on the Data Tab to find the Sort button.



Page Layout View

Familiar to many who spend a lot of time in Word, the Page Layout view has been added to Excel. This gives you ability to see what the printed page is going to look like. To switch to Page Layout view, use the buttons toward the lower right corner of the Excel window.

Tables

Tables have been greatly improved and more user friendly in this version. If you like auto filter in previous versions... make sure you take time to play with Tables in this version. When you change your spreadsheet to a table, the Column Label, instead of being A,B,C,etc., become the Heading you specify in your table, alleviating to need to freeze your top pane. You can convert your data to a table using the Table button found on the Insert Tab.