

Contributors: Jim Boyce, Jeff Conrad, Jody Gilbert, Katherine Murray, Debra Littlejohn Shinder, Tiffany Songvilay, Craig Stinson

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By Jody Gilbert

Office 2007 offers new file formats, an improved user interface, and a number of deployment, support, and security improvements. Here are a few things to think about as you decide whether an upgrade makes sense for your organization.

1 Office 2003 and its predecessors are out of date

The Office platform was built on what are now antiquated technologies—and it has accumulated a lot of gunk over the years. For some perspective, consider that the first version of Word for Windows, released in 1989, had roughly 100 commands and two rudimentary toolbars. Word 2003 has more than 1,500 commands and 30-plus toolbars. As the bells and whistles piled up, a lot of flaws and problems were worked around, built on top of, and left unfixed.

Office 2007 represents a clean break in platform design, built from the ground up to shed the superannuated binary file formats and enable a new (forgive me) paradigm for usability. Instead of trying to implement some fairly critical enhancements on top of the existing design (e.g., blogging capabilities and security features like the Document Inspector), Microsoft opted to incorporate those changes, along with a radically re-architected interface, into a brand new model.

2 Office 2007 comes in eight flavors

A certain amount of grumbling has accompanied what some perceive as needless packaging complexity and marketing gamesmanship, but in fact, it might serve your organization well to have eight editions to choose from. The versions (which are detailed in ["Which edition of Office 2007 is right for you?"](#)), run the gamut from a bare-bones OEM installation to elaborate systems for heavy lifting in the enterprise:

- ◆ Microsoft Office Basic 2007
- ◆ Microsoft Office Home & Student 2007
- ◆ Microsoft Office Standard 2007
- ◆ Microsoft Office Small Business 2007
- ◆ Microsoft Office Professional 2007
- ◆ Microsoft Office Ultimate 2007
- ◆ Microsoft Office Professional Plus
- ◆ Microsoft Office Enterprise 2007

You'll definitely want to closely analyze the included applications, supported technologies, upgrade paths, and pricing to make sure you're not paying for more than you need or sacrificing essential components.

3 Pricing is about on par with Office 2003

The price structure for Office 2007 maps pretty closely to Office 2003. For example:

- ◆ The retail price for Office Professional 2007, which includes Word, Excel, PowerPoint, Outlook with Business Contact Manager, Office Accounting Express, Publisher, and Access, costs \$499 dollars (\$329 for the upgrade).
- ◆ The retail cost for Microsoft Office Small Business 2007, which includes Word, Excel, PowerPoint, Outlook with Business Contact Manager, Office Accounting Express, and Publisher, costs \$449 (\$279 for the upgrade).
- ◆ The Microsoft Office Standard 2007 edition, which includes Word, Excel, PowerPoint, and Outlook, costs \$399 dollars at retail for the full version (\$239 for the upgrade).

4 If you need a lot of stuff, the upper-end versions can deliver

If your organization is large enough or has diverse enough needs, it might make sense to purchase Microsoft Office Enterprise 2007 licenses. This will provide you with a huge variety of Office 2007 applications and technologies—Word, Excel, PowerPoint, Access, Outlook, and Publisher, as well as InfoPath, Groove, OneNote, and Communicator, plus support for Enterprise Content Management, integrated electronic forms, and advanced information rights management and policy capabilities.

The Office Professional Plus edition offers a more modest lineup: Word, Excel, PowerPoint, Access, Outlook (without Business Contact Manager), Publisher, InfoPath, and Communicator. It also supports integrated ECM, electronic forms, and advanced information rights management and policy capabilities. Both packages are available through volume licensing.

5 New file formats offer numerous advantages

Office 2007 introduces the XML-based Open XML file formats for Word, Excel, and PowerPoint. These formats offer a number of significant advantages:

- ◆ More compact size (the files are compressed)
- ◆ Less chance of corrupted files (components are stored as separate entities, so if one piece is damaged, the rest of the document is still viable)
- ◆ Better integration of business information (users can more easily assemble documents from various data sources, exchange data between Office and other systems, and publish, locate, and reuse information)
- ◆ Interoperability (information can be used by any application that can read and write XML, not just Office apps)
- ◆ Security (because of the transparent nature of the format, sensitive information can be readily identified and removed; the format also allows you to identify, isolate, and manage embedded code and macros)
- ◆ Compatibility (the .doc, .xls, and .ppt binary formats are compatible with Office 2007 apps, and users of Office 2000/XP/2003 can install the [Compatibility Pack](#) so that they can open, edit, and save documents in the new formats)
- ◆ Open and royalty-free specification
- ◆ Easier integration (developers have direct access to specific contents within the file, like charts, comments, and document metadata without having to parse entire documents)

This [MSDN article](#) covers various aspects of the new formats in some detail.

6 Interface is redesigned to improve productivity

Office 2007 offers what Microsoft is calling the *fluent user interface*, designed to achieve some pretty lofty design goals. The main challenge was to free users from having to thrash their way through the convoluted menu structure in an attempt to locate the commands, tools, options, and features needed to accomplish a particular task.

The Ribbon replaces the menu structure and offers a context-sensitive display of options organized according to function. Along with the Ribbon come a number of other usability aids, including Live Preview, which gives users a look at the effect of various formatting options on selected text before they make any changes; the Mini Toolbar, which offers basic formatting buttons and hovers semitransparently over selected text; galleries, which are essentially prefab collections of attributes for certain items (like tables); and a customizable status bar with buttons for genuinely useful features.

7 App-specific enhancements add efficiency and power

Apart from their interface-lift, Office 2007 applications provide some legitimate feature improvements that in many cases, will allow users to be more productive and produce better results. A few examples:

- ◆ Word 2007 offers an enhanced document comparison feature lets you view original copy against revised copy in a tri-pane window; its Document Inspector finds and removes comments, hidden text, and personally identifiable information; it offers prefab building blocks (elements like cover pages and sidebars) to speed document assembly.
- ◆ Excel 2007 has expanded its spreadsheet capacity to 1 million rows and 16,000 columns; charting is simplified; conditional formatting is easier to apply; new tools make it easier to discover trends and variances in your data.
- ◆ PowerPoint 2007 lets you set up slide libraries on a SharePoint Server 2007 site and keep presentations synchronized with the slides stored there; you can design custom slide layouts; you can apply a theme to globally transform the appearance of a presentation.
- ◆ Access 2007 includes new database templates to help you set up things like inventory tracking and project management; you can use new grouping, filtering, and sorting features to refine your reports; it includes some new field types.
- ◆ Outlook 2007 offers a To-Do bar that shows you flagged e-mail and tasks; calendar sharing has been improved; an attachment previewer has been added; it includes support for reading and managing RSS feeds.

8 New features make it easier to turn out better-looking results

Although improving productivity is high on the list of Office 2007 design objectives, a number of new tools and features are aimed at helping users produce more sophisticated and attractive documents and presentations. For instance:

- ◆ Word's Quick Style sets make it easy for even style-phobic users to format document text consistently (instead of forcing them to choose from one monster list of unrelated styles or make ad hoc manual formatting changes).
- ◆ The new SmartArt feature, which you can use in Word, Excel, PowerPoint, and Outlook e-mail messages, lets you create slick graphics to convey all kinds of information.
- ◆ Word comes with a gallery of building blocks, which you can drop into a document to add preformatted elements like headers and footers, cover pages, sidebars, and pull quotes.
- ◆ Access offers new templates for a variety of purposes and a greenbar format to make forms and reports sharper-looking and easier to read.
- ◆ An enhanced set of themes—coordinated across Word, Excel, and PowerPoint—lets you develop a standard look and feel across all your documents and presentations.
- ◆ Excel's charting features (supported in Word and PowerPoint) have been improved and include new special effects and templates. Excel also offers more color choices, richer conditional formatting, styles to simplify formatting tables, charts, and pivot tables, and a much improved implementation of cell styles.
- ◆ PowerPoint allows you to create custom layouts and offers new text options, such as columns, wrapping, vertical text, and special effects (glowing, fills, 3-D, etc.).

9 Beefed-up user assistance reduces support overhead

Office 2007 includes a considerable number of user support features. For starters, Enhanced ScreenTips generally provide more than just the name of a tool or button. In many cases, a ScreenTip will offer a picture or diagram, an explanation of the tool's purpose, and a link to relevant online help topics.

Also, since the tools and features are designed to be more accessible and intuitive, users should be able to complete various tasks without requiring too many support calls (at least in theory).

By default, the Office help system is tied into Office Online when users are connected to the Internet. (If that feature is disabled or they're not connected, they can still access the locally installed help files.) Along with topic- and task-specific help for each application, Office Online offers a wide variety of training and support options, including [video demos](#), [self-paced training courses](#), [interface guides](#) to help users map familiar commands to the new Ribbon locations, [eLearning modules](#), downloadable [training presentations](#), and a few [experimental podcasts](#).

10 Numerous deployment options are available

Office 2007 supports a variety of deployment options, whether you need to install it on one system or hundreds (or even thousands) of systems. You can prepare disk images, deploy it on networks with limited bandwidth using precache technology, upgrade existing versions, or deploy it across an enterprise using Group Policy or Microsoft SMS 2003.

In addition, Microsoft offers its [Solution Accelerator for Business Desktop Deployment \(BDD\) 2007](#), which can help you perform large scale Office (and Vista) rollouts. Among other things, it lets you create software and hardware inventories to help in installation planning, test applications to confirm compatibility before installation, and create a lab environment. It also includes custom options, scripts, and sample configuration files.

If you have a large number of old-format files, you might want to check out the free [Office Migration Planning Manager](#) (OMPM), which you can install on computers running XP SP2, Vista, or Server 2003. Once the OMPM is installed, you can use its Office File Converter to perform a bulk conversion of your old Office files to the new XML-based format.

By Jody Gilbert

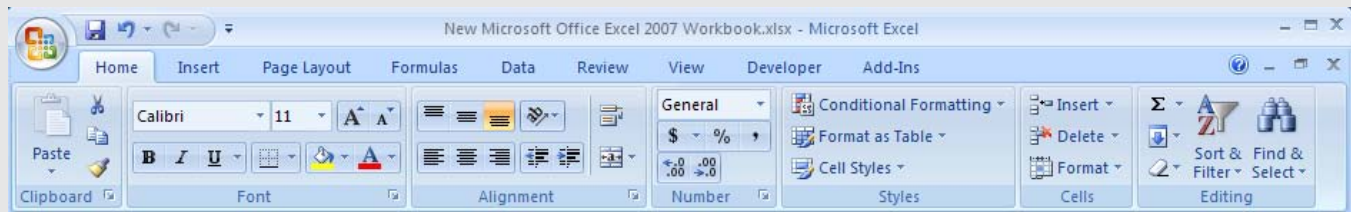
I've read a lot of early documents trying to sort out and describe the new Office 2007 interface. Not only has there been some confusion over where all the familiar stuff has gone and how to use the new stuff, but there have been rampant inconsistencies in terminology. So, for instance, the Office button has been variously called "the Logo button," "the Office icon," and "the big round control at the left end of the ribbon bar."

To help clarify things—and possibly to facilitate clearer conversations about all these features as you help users get up to speed—I've listed 10 major Office 2007 interface elements (using their Microsoft-given names).



1 The Ribbon

If you've seen Office 2007 (Word, Excel, PowerPoint, Access, or Outlook items such as messages), you know about the Ribbon. It houses tabs with functional groupings of buttons and drop-down lists that are supposed to be relevant to particular tasks. Some icons are bigger than others, engineered that way to add prominence to the most commonly used items. Below is the Ribbon that appears when you're in an Excel worksheet cell.



If you find the Ribbon distracting or too space-consuming, toggle it out of sight using one of these methods:

- ◆ Press CTRL-F1.
- ◆ Double-click on any of the tab labels.
- ◆ Right-click on the row of tab labels or any item within a tab and choose Minimize The Ribbon from the shortcut menu.
- ◆ Click on the drop-down arrow at the end of the Quick Access toolbar and choose Minimize The Ribbon.

Clearly, Microsoft saw that one coming.

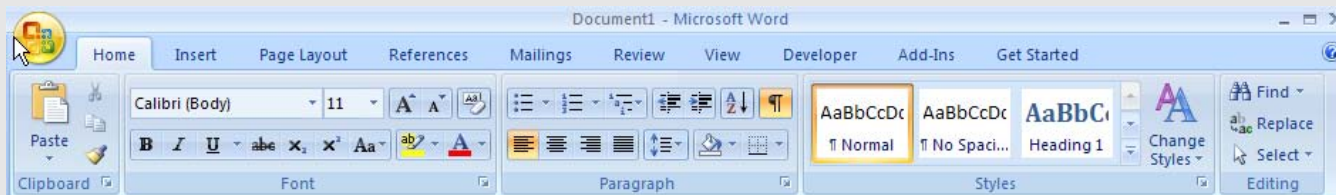
2 Tabs, contextual tabs, program tabs

Each of the beRibboned apps initially displays a standard set of tabs, which vary depending on the application. For example, Excel's standard set of tabs (which you can see above) includes Formulas and Data, whereas Word offers References and Mailings. In addition to the standard tabs, you'll see specialized *contextual tabs* that appear depending on what you're working on. For example, if you insert a chart in Excel, the Chart Tools tab will appear, with Design, Layout, and Format subtabs, as shown below.

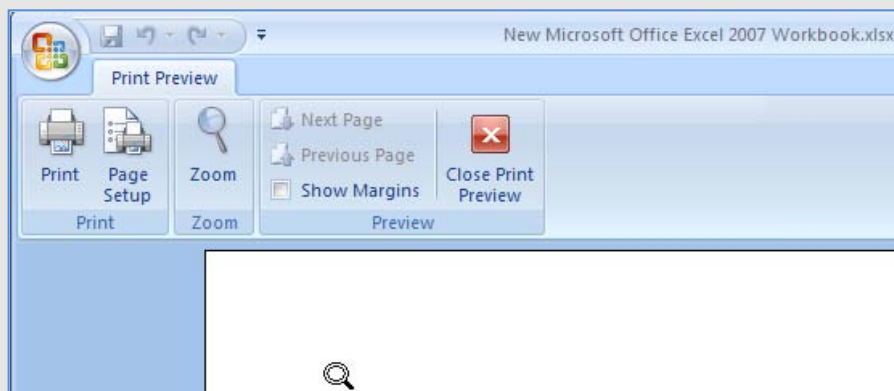


Incidentally, you may sometimes see more than one contextual tab. I was working with a picture in a table in a Word doc, and both the Table and Picture tabs appeared on my Ribbon.

Tabs come with their own terminology, too: Each tab is divided into *groups*. So, for example, the Word Home tab below has groups called Clipboard, Font, Paragraph, Styles, and Editing. And certain groups (all but the Editing group in the Ribbon shown here) have *dialog box launchers*, those tiny icons in the bottom-right corner of the group. Click that icon and you get a traditional dialog box or task pane associated with the group.



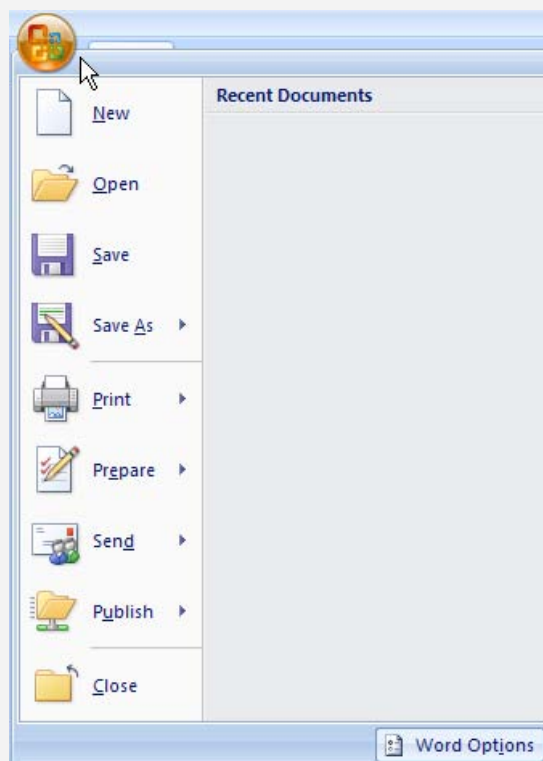
One more distinction to make regarding tabs: The Ribbon also sometimes displays *program tabs*. These are tabs that appear for certain views or authoring modes, such as Print Preview.



3 The Office button

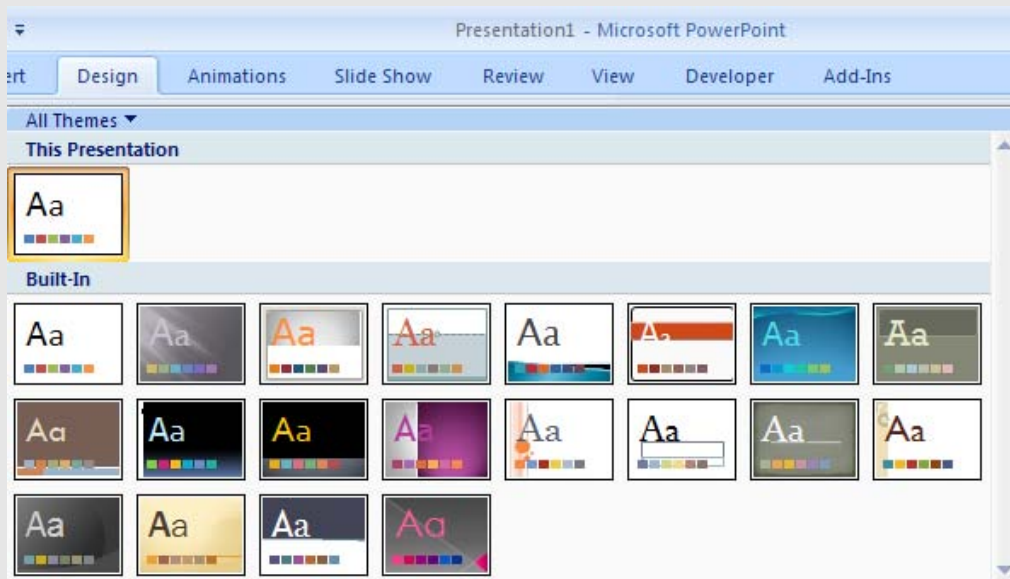
Clicking the Office button displays the Office menu, which is sort of like the traditional File menu. It offers basics such as New, Open, and Save commands, along with some newcomers, like Prepare and Publish. In the figure to the right, I've purged the Recent Documents list (not that I have anything to hide), but it took awhile to find the option that controls that display.

To save you some looking, here's the trick: Click Word Options (or Excel, PowerPoint, or Access Options) at the bottom of the menu and select Advanced. In the pane on the right, go to Display. You can enter the desired number in the Show This Number Of Recent Documents text box (0 to clear the list and keep it that way, and as many as 50 in Word, Excel, and PowerPoint. Access limits you to a maximum of nine.) Just click OK when you're finished.



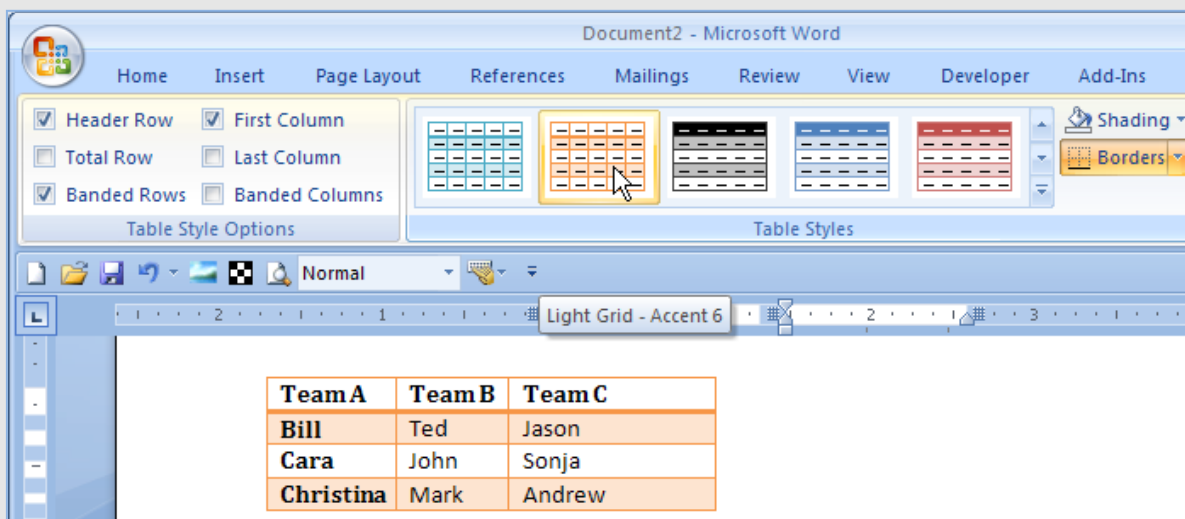
4 Galleries

A gallery is a palette of prefab formatting attributes you can apply to various elements in Word, Excel, PowerPoint, and Access. Examples include tables, styles, charts, and PowerPoint themes, shown here.



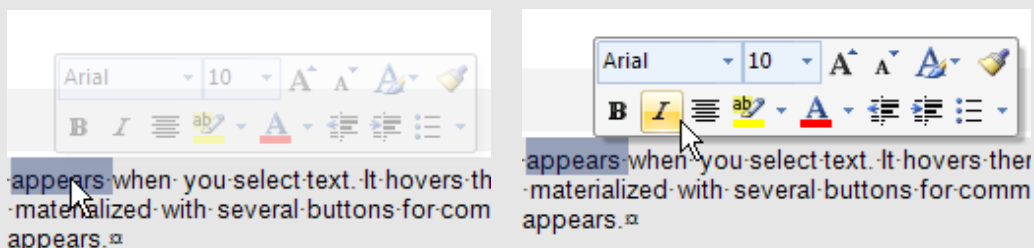
5 Live Preview

Along with the gallery feature comes Live Preview, which is aptly named. When you move the mouse over the various selections in a gallery, your document takes on the formatting attributes of the current selection—just as a preview. So you can flit from one choice to another and try on the various sets of formatting without committing to anything until you're ready. In the image below, I was spinning through the offerings in the gallery of table styles:



6 The Mini Toolbar

The Mini Toolbar is a ghost toolbar that appears when you select text. It hovers there in the ether unless you move the mouse pointer over it, when it materializes with several buttons for common text formatting tasks. Move off it or click somewhere else, and it disappears.

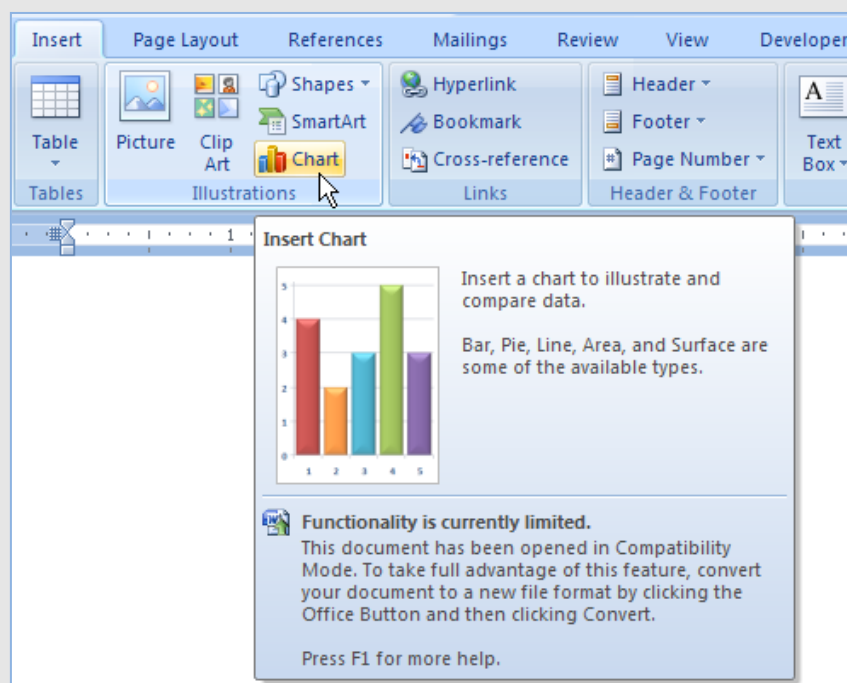


7 Enhanced ScreenTips

When you move the mouse pointer over items in the Ribbon, you'll see Enhanced ScreenTips. These ScreenTips will probably come in handy for novice users and those who are learning the Office 2007 ropes. More experienced users may not pay much attention to them, although in some cases, they should. For example, if you forget you're working on a document in Compatibility Mode (as I did), you might otherwise be confounded if you run into limited functionality. The ScreenTip shown here serves as a useful reminder.

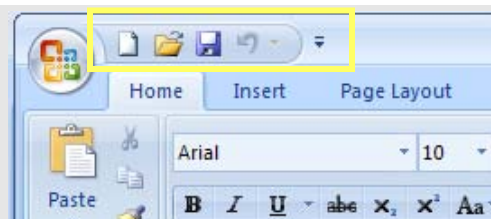
Not all ScreenTips are this colorful or verbose. Some offer the feature name and a terse description and possibly a keyboard shortcut.

If you don't like the ScreenTips, you can suppress them or eliminate the "Enhanced" characteristics. Choose Options from the Office menu and under the Popular settings, choose either Don't Show Feature Descriptions In ScreenTips or Don't Show ScreenTips.



8 The Quick Access Toolbar

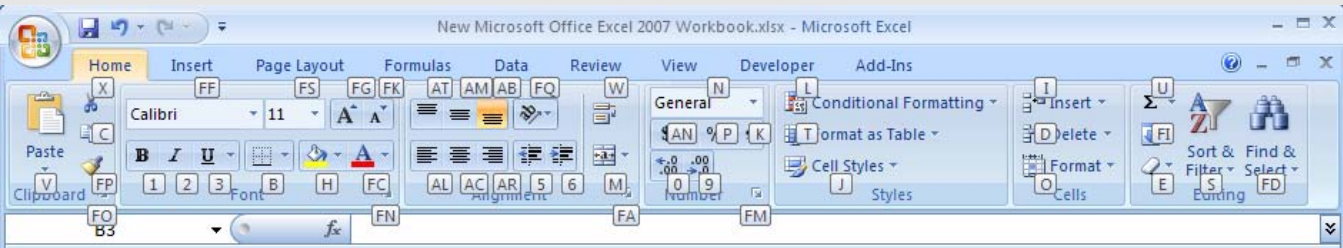
The Quick Access Toolbar is by no means an innovation. Still, I'm relieved to have it in the Office 2007 interface because it can serve as a customized toolbar that's similar to ones I've always used in earlier versions. The Quick Access Toolbar, shown here, displays only above or below the Ribbon (no undocking or minimizing).



The Quick Access Toolbar comes with a set of basic, frequently needed buttons to get you started. At the right end, you'll find the Customize Quick Access Toolbar drop-down arrow, which gives you a list of other frequently needed buttons, such as Undo, Print Preview, and Spelling & Grammar. Just select what you want from the list and they'll appear on the Toolbar. The better news is that you can also choose the More Commands option from the list to access all commands, including those not found anywhere on the Ribbon, as well as any macros you might want to have handy.

9 KeyTips

I don't want to editorialize excessively here, and I should point out that the traditional Office keyboard shortcuts (CTRL-C, SHIFT-F3, etc.) work as they've always worked. And KeyTips—designed to serve as keyboard accelerators to access various items on the Ribbon—are sound in principle. You press ALT and then you press the appropriate additional keys as indicated by the KeyTips labels. But I'm not entirely convinced that this implementation is going to be all that well received. Here's an example:



10 The status bar

Okay, you already know the name of this one--and miracle of miracles, it's still in the same old spot. But it's a status bar on steroids, so you should be aware of its new trappings. By default, the Office 2007 status bar offers options such as a Zoom slider for magnification and view options (Draft, Print Layout, etc.). The options vary by application.

But here's the best part: You can customize what appears on each application's status bar. Just right-click on it and you'll see the Customize Status Bar menu, shown here. It lists everything you can place on the status bar, along with its current state.

Customize Status Bar		
	Formatted Page Number	4
	Section	1
<input checked="" type="checkbox"/>	Page Number	4 of 5
	Vertical Page Position	4.2"
	Line Number	12
	Column	70
<input checked="" type="checkbox"/>	Word Count	923
<input checked="" type="checkbox"/>	Spelling and Grammar Check	Errors
<input checked="" type="checkbox"/>	Language	
<input checked="" type="checkbox"/>	Signatures	Off
<input checked="" type="checkbox"/>	Information Management Policy	Off
<input checked="" type="checkbox"/>	Permissions	Off
<input checked="" type="checkbox"/>	Track Changes	Off
<input checked="" type="checkbox"/>	Caps Lock	Off
	Overtype	Insert
	Selection Mode	
<input checked="" type="checkbox"/>	Macro Recording	Not Recording
<input checked="" type="checkbox"/>	View Shortcuts	
<input checked="" type="checkbox"/>	Zoom	100%
<input checked="" type="checkbox"/>	Zoom Slider	

By Tiffany Songvilay

Buried deep within the sitemap of Microsoft.com are lots of options for training your users on Office 2007. But ever since the incredible Mr. Clippit, users have been quick to shrug off Microsoft help, and IT has had to reinvent the Office Fundamentals Training Wheel. Here are some tips for getting the most out of free Microsoft tools to help you educate and support your users.

1 Links to tip sheets and articles

Instead of telling your users to go out to Microsoft.com and do a search for *Word 2007*, put hyperlinks to the printer-friendly version of tip sheets and articles like [Word or Publisher? Which one should you use?](#) on your company's main portal page. Providing links to information you know they need will help you cover the training bases. Presenting the links on an internal Web site they already use will show your users that it's okay to go outside of their four firewalls to learn something new. Include your favorite hyperlink in your signature line so it goes out in every e-mail you send.

2 Online training

[Office online self-paced training courses](#) are a great way to link your users to 30- to 60-minute onscreen, clickable demos to walk them back through the steps you just took them through over the phone or as a replacement to that step-by-step e-mail you always take the time to write.

Since these demos do have sound, remind them to turn their speakers on or put on their headphones before following the link. These videos do not require multiple clicks to get to the start of the course nor do they require a logon with a Windows Live ID. As a point of reference, these are the same demos that are returned via the Help menus in Office. Common problems are broken up into one- to two-minute increments so that it's easy for users to pause the course and rejoin it later. So, for instance, the next time someone complains that they've hit their size limit in Outlook, send them this link: [How to clear away the clutter in your Inbox](#).

3 E-Learning

[Microsoft E-Learning](#) includes free, self-paced, onscreen fundamentals training courses for Live Meeting, Groove, Windows Vista, and the Office 2007 user interface. Users must log on with their Windows Live ID, but no ActiveX controls are required. Navigation is explained in the introduction to each course.

You might also want to check out the free courses for IT professionals listed in the course catalog at the top of the screen: BizTalk Server 2006, SQL Server 2008, and Security Guidance training. Don't forget to find the word FREE on the Developer Catalog page as well.

4 Webcasts

[Live and On-Demand Webcasts](#) also require a Windows Live ID; however, there is a new Web viewer for LiveMeeting that allows users to view the webcast on demand without downloading LiveMeeting, which is key in the managed PC environment. Users won't be able to download the Windows Media file for offline viewing of an on-demand webcast from a managed PC, but check with your Microsoft rep (see Tip #7). They typically have some of these webcasts available for you on a DVD to upload into your training tracking system, if you want to make watching one or more of these webcasts required for your users.

5 Virtual training

[Virtual Labs](#) are admittedly not for the average user, but they can prove useful in teaching your SharePoint designers and help desk staff. These labs do require ActiveX controls to run, so take care not to recommend these labs to users unless Virtual Server VRMC Advanced Control and Virtual Machine Remote Control Advanced ActiveX are in your standard PC build. A lab manual is available with each course and it connects you to a clickable Virtual PC environment. Disregard the Office 2007 First Look labs, since they were built on Beta 2, but scroll down to find gold in [What's New in Microsoft Office SharePoint Server 2007 Feature Walkthrough Virtual Lab](#).

6 [Partner events](#)

In-person events mean going offsite, and besides submitting an expense report for the extra 3.26 miles you had to drive to get there, it is a great way to send a couple of your favorite users in any department to learn about solutions and ideas on how to leverage the software your company already owns. I especially recommend this site around Administrative Professionals Week. Instead of taking the boss' assistant out to lunch, send him or her an invitation to a Microsoft event that is sure to yield free lunch and swag. (Pssst: Administrative Professional Week is in March.) The IT human that always knows where to get branded stress balls is the IT human with the most stress balls. And I think we can all agree that when we're back at the office at 2 o'clock in the morning on a weekend to oversee a data transfer, nothing comforts you like squeezing a cleverly shaped stress ball.

7 Trucked-in training

If you followed the partner event link in the previous tip, you might have noticed the [Microsoft Across America Truck](#) as one of the options. If your company is a Microsoft partner, you can book this truck. If you're not a Microsoft partner, encourage your Microsoft rep or third-party solutions provider to host an event. As a partner, it's a great way to gather new leads; as a customer, it's an opportunity for you to talk to industry experts and service providers about solutions you need to manage your Office 2007 rollout.

8 Microsoft Marketing Events

If you don't know who your company's Microsoft representative is, you can go to the [Microsoft U.S. Office Locations](#) page to find the Microsoft office closest to you. Then, just call and ask to talk to the IWSS (Information Worker Solutions Specialist) for your district. IWSSes are given corporate resources to deliver onsite events to their clients.

For example, a "Tips and Tricks" team is available to present 60- to 90-minute scenarios at your location, and most offices have a TS (Technology Specialist). The TS is tasked in part with visiting clients and creating these types of events for their clients. While there is no cost to you, there is typically an attendance minimum of 60 people per day to justify Microsoft's cost of sending a presenter, and it's all rolled up into the benefits of being an Enterprise customer. What types of seminars do they present? Follow the webcast link in Tip #4. Most of those topics can be delivered at your location.

9 Multilingual ScreenTips and translations

[¿No habla Inglés?](#) For many international companies, rolling out Microsoft software worldwide is a daunting task due to language barriers and the lack of training materials available in foreign languages early in the software lifecycle. Fortunately, translation assistance is available.

Open up a Word 2007 document and right-click anywhere on the page. Click Translate and then chose Arabic, French, or Spanish. Give it a moment to activate, and you should be able to scroll over any word in the document and get a ScreenTip that translates the word for you and gives you a definition in the language you selected.

Still not satisfied? Right-click and choose Translate from the shortcut menu. Choose the language you want to translate the document from and then the language you want to translate the document to. Click the green arrow under Translate The Whole Document. When you see a message telling you that you're being sent to [Word Lingo](#), click Yes. This is a free Internet service that has been available from the Research pane since Office 2003.

10 [Command Reference Guides](#)

If you do nothing else for yourself, include this link in your signature line and don't call it a command reference guide when you do. Name it something like "Where have all my toolbar buttons gone?!" These interactive reference guides show an Office 2003 toolbar. When users click on a familiar button, the screen fades to an Office 2007 screen and highlights where that button is on the Ribbon. For users who complain about the time they waste each day looking for things like Print and Spell Check, this tool will eliminate their frustration with the Ribbon. If you make one item mandatory for all training classes and corporate communications, let it be this one. Make sure every user knows it's out there BEFORE you push Office 2007 to their PC.

11 [Office Online At Work](#)

One final tip as we round out the list of training options. Remember that when you reference Microsoft.com, you are referring to a lot of things that don't apply to your users. Remove Microsoft.com from your IT reference guide and replace it with office.microsoft.com. Go out to this site every day, and you'll see that it is not a static page. The pictures and links change daily as new content is added and refreshed. I included the At Work link above because it has plenty of resources to tire out your busiest busybody. This is the link to include in your Out of Office Assistant message when you finally get go on vacation once the rollout is complete.

Tiffany Songvilay is a Microsoft Office Specialist and co-author of [So That's How! 2007 Microsoft Office System: Timesavers, Breakthroughs, & Everyday Genius](#). She has presented productivity scenarios at Microsoft's Convergence, ITEC Conference and Exhibition, and for IAAP. Currently engaged as a business analyst for Microsoft Enterprise customers, she designs and implements training plans that help companies transition their workforce smoothly into new technology. Her [Office Over Easy blog](#) covers a variety of IT and end users issues.

By Debra Littlejohn Shinder

Microsoft Office 2007 provides a lot of new features and functionality, but what about compatibility? Here are 10 tips for dealing with compatibility issues when you upgrade to the latest versions of Word, Excel, PowerPoint, and Outlook.

#1: Understanding and using new file formats

All the Office 2007 programs use new default file formats based on the Extensible Markup Language (XML). The new formats are indicated by an "x" in the file extension. For example:

- Word documents: .docx
- Excel workbooks: .xlsx
- PowerPoint presentations: .pptx

XML is an open standard, and the change makes it easier to move files between different applications. It also makes file sizes smaller than those saved in the old binary formats. However, some users with previous versions of Office may not be able to open files in the new formats.

You can still save files in Office 2007 programs in Office 2003 file formats. Just select Word 97-2003 Document (*.doc) from the Save As Type drop-down list in the Save As dialog box, as shown in **Figure A**.

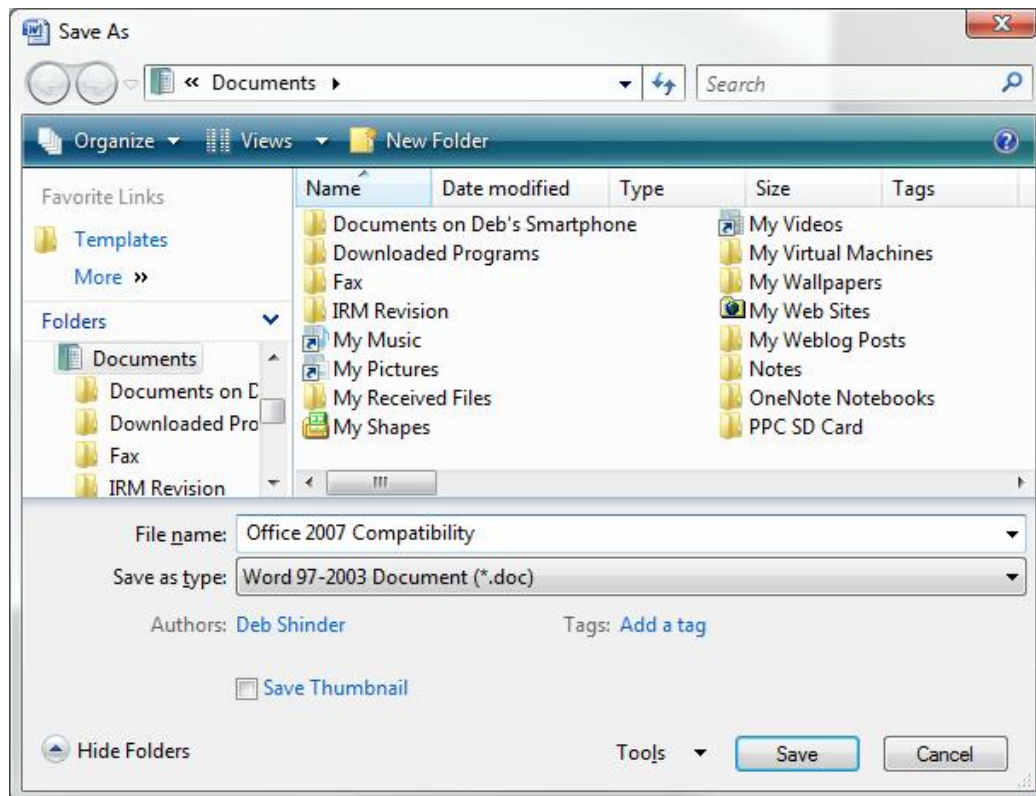


Figure A: You can easily save individual files in the old Office 2003 formats.

#2: Changing the default format

If you want to always save files in the old format by default, click the Office button, then the <program name> Options button, and select Save in the left pane. Choose Word 97-2003 Document (*.doc) from the Save Files In This Format drop-down list, as shown in **Figure B**.

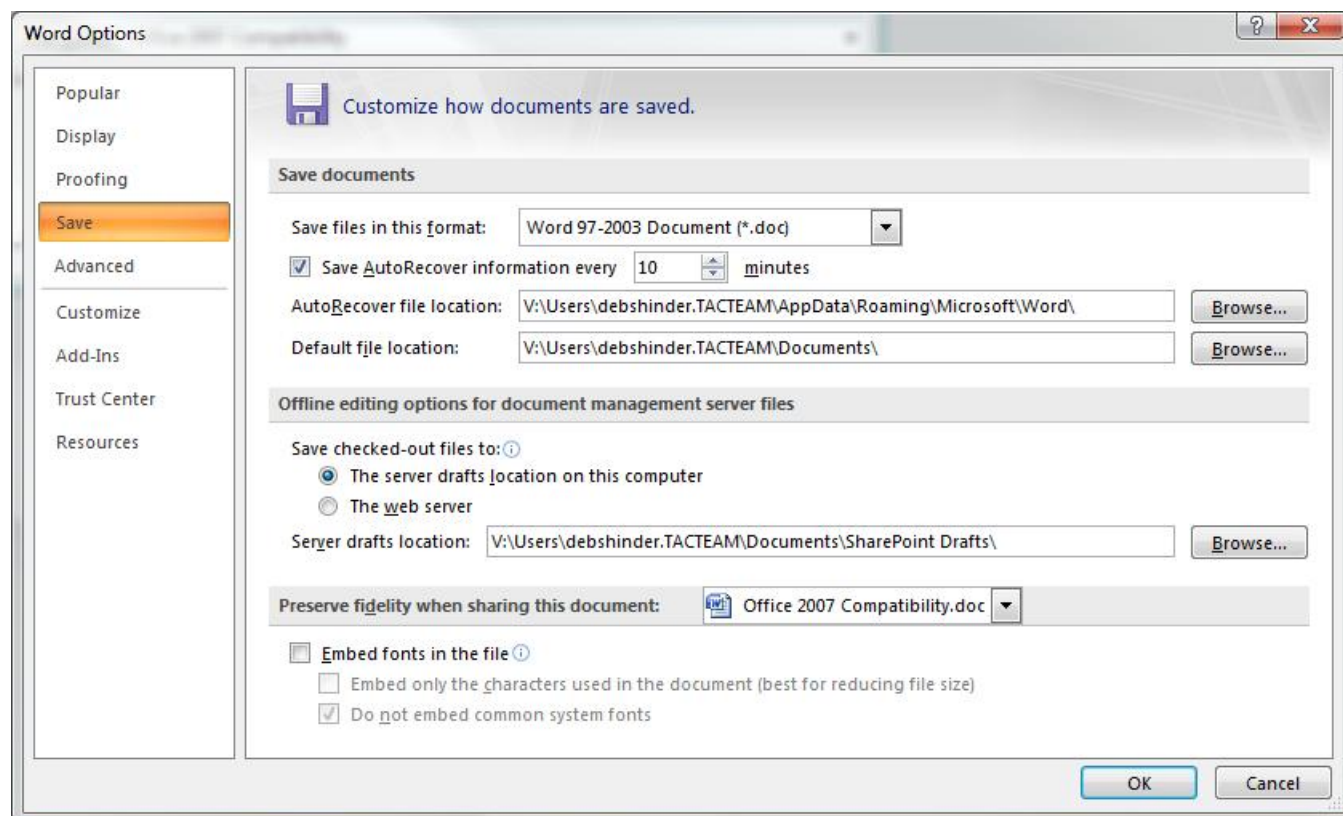


Figure B: You can set the default to always save files in the old Office 2003 format.

When you save a file in the old format that was originally created in the new format, you may get a message advising that some of the formatting and features that are only supported by Office 2007 programs will be lost.

#3: Using Office 2007 compatibility mode

Office 2007 programs introduce a new feature called compatibility mode. If you frequently share files with others who haven't upgraded or you need to work on your files on another computer (for example, a laptop) that doesn't have Office 2007 installed, you can ensure that the files you create in Office 2007 don't contain any features that aren't supported by the previous version of the Office program.

If you place your Office 2007 applications in compatibility mode, incompatible features, such as the SmartArt diagramming tool, won't be available to you. Instead, you'll use the diagramming tool from Office 2003 so that the diagrams you create can be edited in the older version of the program.

Compatibility mode is automatically on when you open a file that was saved in the old file formats, when you convert a file from the XML-based format to the older format, or when you configure the program to save to the old format by default. In Word, compatibility mode also kicks in if you create a new document from an old-format template (.dot).

When the Office 2007 program is in compatibility mode, it will be indicated in the document title bar, as shown in **Figure C**.

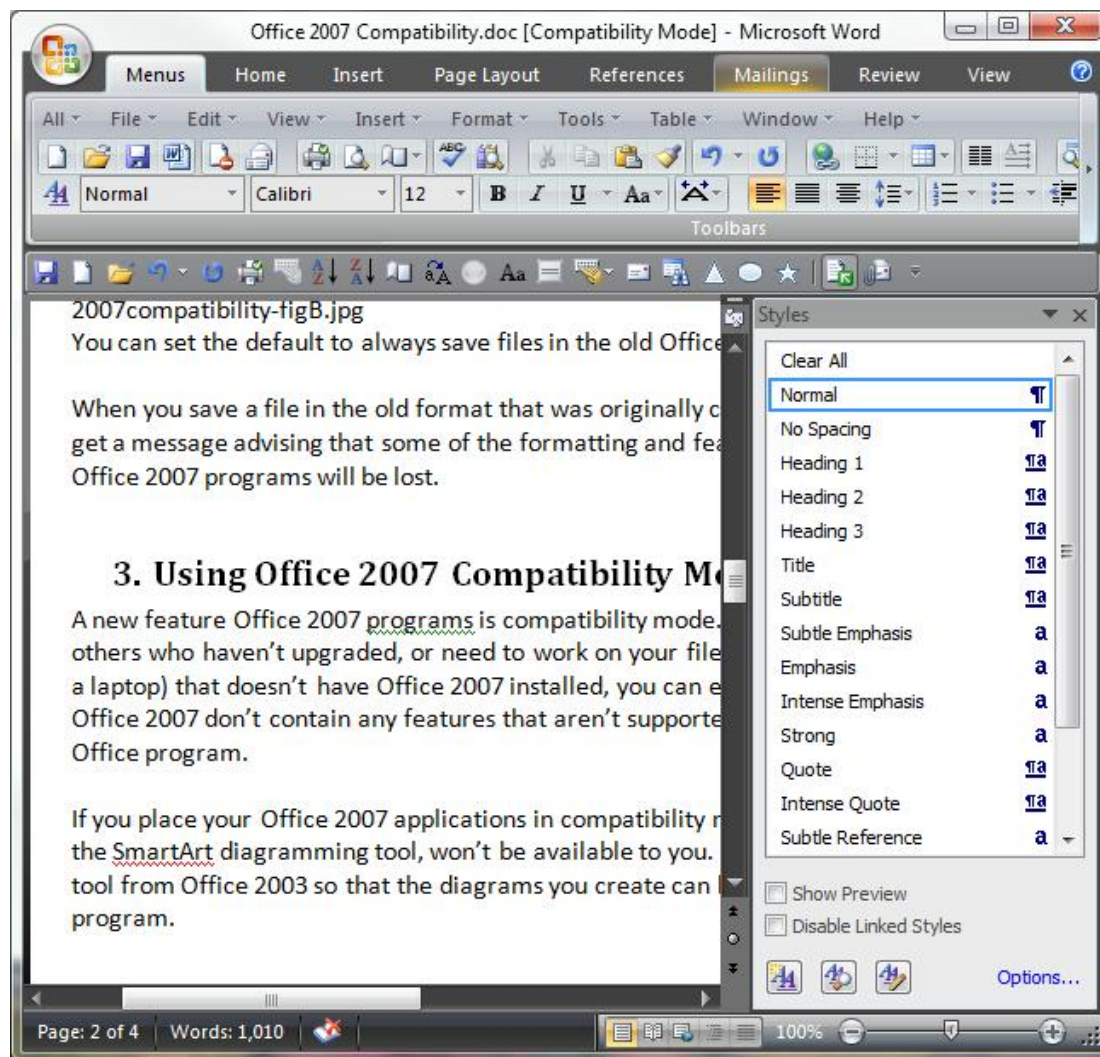


Figure C: Office Compatibility Mode is indicated in the title bar of the document.

Some features can be returned to the document if you reopen it in an Office 2007 program; others can't. For a full list of the features that are lost when you work in compatibility mode and which ones can be refreshed, see the article "[Compatibility Mode in the 2007 Office System](#)" on the Microsoft TechNet site.

#4: Installing the Office 2007 Compatibility Pack

If someone with whom you exchange files is still running an older version of Office and you want to be able to send them files in the new XML formats (for instance, so they can see the formatting features that are unique to Office 2007), they can install the Office 2007 Compatibility Pack.

The Compatibility Pack allows users of Office XP or Office 2003 to open, edit, save and even create files in the new XML-based formats. The pack is available as a [free 27.1 MB download from the Microsoft Web site](#). It can be installed on machines running Windows 2000 SP4, Windows XP SP1, and Windows Server 2003.

#5: Using the OPM File Converter

If you have a large number of Office files saved in the old format that you want to change to the new XML-based format, you don't have to open and save them one at a time in the Office 2007 program. Instead, you can perform

a bulk conversion using the Office File Converter that's included in the Office Migration Planning Manager (OMPM).

The OMPM is a [free 2.7 MB download available from the Microsoft Web site](#). It can also be used by administrators in organizations to scan and generate reports about the Office files on the network. You can install it on computers running XP SP2, Vista, or Server 2003.

Once the OMPM is installed, to perform bulk file conversions you use the OFC.EXE tool at the command line. You'll need to create an ofc.ini file with settings defining what you want to convert. Microsoft provides a template for the ofc.ini file that you can edit to indicate the path for the folders you want to convert. For more information on the contents of the ofc.ini file and how to invoke it programmatically, see "[Converting Office documents to Open XML](#)."

#6: Viewing PowerPoint presentations with PP Viewer 2007

PowerPoint 2007 provides many cool new graphical features that aren't supported by older versions of PowerPoint. These presentations can be viewed by Office XP/2003 users with the Compatibility Pack installed, but what if you want to see a presentation on a computer that doesn't have any version of Office installed?

You can use the PowerPoint Viewer 2007 to view these presentations with all the new features intact. It also supports opening presentations that have been password-protected in PowerPoint 2007 -- however, it does not support viewing presentations that have been protected using Microsoft Information Rights Management technology.

The Viewer is a [free 25.8 MB download available from the Microsoft Web site](#). It can be installed on computers running Windows 2000 SP4, XP SP1, Vista, and Server 2003.

At the time of this writing, viewers for Word and Excel 2007 were not yet available. But you can use the Word and Excel 2003 viewers to view Word and Excel 2007 files if you install the Compatibility Pack. For details, see KB article 925180, "[How to view Word 2007 and Excel 2007 files by using Word Viewer 2003 and Excel Viewer 2003](#)."

#7: Using the Compatibility Checker

Before you send a document that was created with an Office 2007 program to someone who's using a previous version of Office, you can run the Compatibility Checker, which is built into Word, Excel, and PowerPoint 2007. It will identify any features or formatting you've used that won't be recognized by older versions of Office.

A list of the incompatible content will be displayed, and you'll be advised that such content may not be fully editable in the previous version. The Compatibility Checker runs automatically when you save a file in the old format. You can also run it manually from the Office | Prepare menu, as shown in **Figure D**.

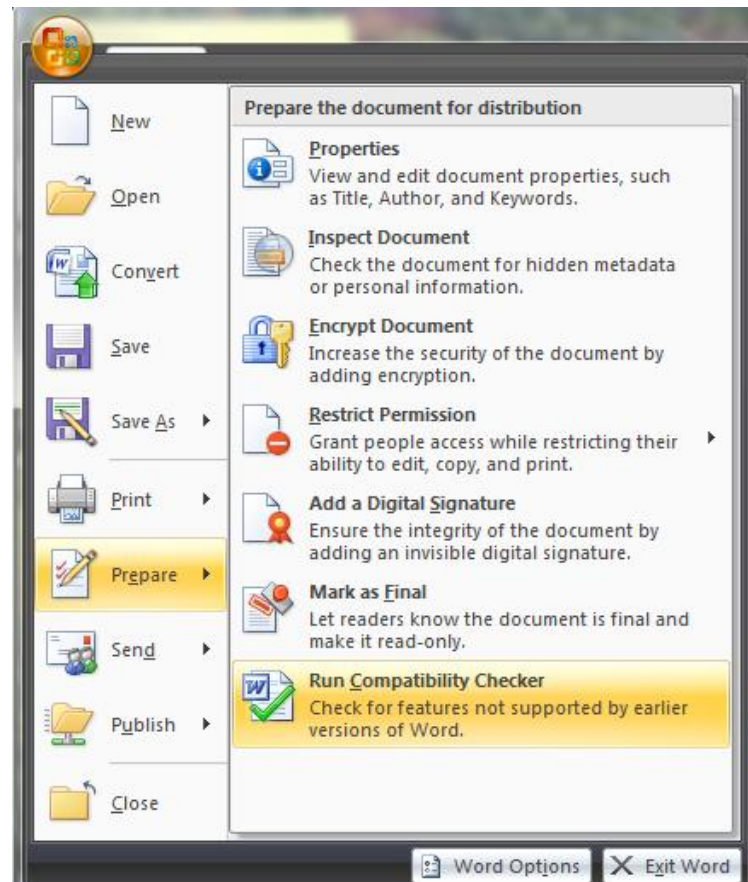


Figure D: You can run the Compatibility Checker from the Office Logo | Prepare menu.

#8: Outlook 2007 and Exchange 5.5

Outlook 2007 works only with Exchange 2000 or later. Users who attempt to connect to an Exchange 5.5 Server will get a message that Outlook is unable to log onto the Exchange server. Extended lifecycle support for Exchange 5.5 ended in January 2006, and Microsoft intentionally designed Outlook 2007 to prevent it from connecting to Exchange 5.5 servers to avoid data loss and other problems that were anticipated with this combination.

Be sure you know what version of Exchange server your organization is running before you update to Outlook 2007.

#9: Office 2007 file formats and mobile devices

The new XML-based file formats can't be opened with current Pocket Office programs on Windows mobile devices running Windows Mobile 2003 and Windows Mobile 5.0. The newest version, Windows Mobile 6, supports the XML-based file formats.

Microsoft is expected to release an update for Windows Mobile 5 in mid- or late 2007 that will allow it to open Office 2007 documents, but those still using WM2003 devices are apparently just out of luck.

#10: Adding on a "classic" user interface

Although not exactly a compatibility issue, many users find Office 2007's new user interface incompatible with their way of doing things. The Ribbon replaces the old-style menus, and while this new tabbed Ribbon seems to be easier to learn for new users (who haven't used previous versions of Office), many longtime Office users have complained that they miss the old menus.

If you want, you can install a third-party add-on that gives you back the old menu bar without sacrificing the new Ribbon. Classic Menu for Office 2007 installs easily and costs \$29; it's available from www.addintools.com. After it's installed, an extra tab appears on the Ribbon called Menus, as shown in **Figure E**.

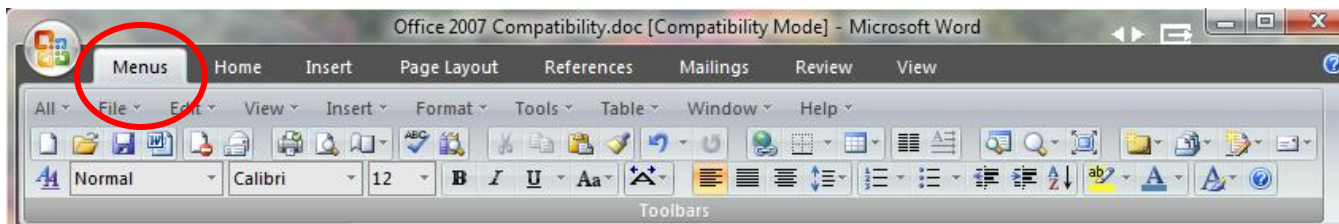


Figure E: If the new Ribbon interface is incompatible with the way you like to work, you can add back the Classic Menu.



Debra Littlejohn Shinder is a technology consultant, trainer and writer who has authored a number of books on computer operating systems, networking, and security. These include *Scene of the Cybercrime: Computer Forensics Handbook*, published by Syngress, and *Computer Networking Essentials*, published by Cisco Press. She is co-author, with her husband, Dr. Thomas Shinder, of *Troubleshooting Windows 2000 TCP/IP*, the best-selling *Configuring ISA Server 2000*, and *ISA Server and Beyond*.

By Katherine Murray

The latest version of Word provides a number of ways to tailor the program so that it fits your style of doing things. Here's a look at 10 techniques for customizing the look, feel, and function of Word 2007.

#1: Hide the Ribbon

The earliest reactions to Word 2007 have been mixed—some people love the look of the new Microsoft Office Fluent interface (the



Figure A

formal name for the new design, which includes the Ribbon), and others, not so much. It seems that the most resistance has come from experienced Word users, people who were happy with their familiar set of shortcut keys and customizations.

One complaint has been that the Ribbon is a little too space-consuming. If you prefer to have more working room on the screen than Word 2007 offers by default, you can hide the Ribbon by pressing Ctrl+F1. This reduces the Ribbon to only the tab titles, so the commands are within reach if you need them (**Figure A**). To return the Ribbon to normal display, press Ctrl+F1 again.

#2: Customize the Quick Access Toolbar

The Quick Access Toolbar is the small toolbar that appears to the right of the Microsoft Office button in the upper-left corner of the Word 2007 window. This toolbar provides access to commands you are likely to use often. By default, it displays only Save, Undo, and Redo. You can easily change the commands that appear in the Quick Access Toolbar so that it contains those you use regularly. For example, if you frequently check spelling and grammar in your documents (not a bad idea), you may want to add the Spelling & Grammar command to the Quick Access Toolbar. To add a command, click the arrow to the right of the Quick Access Toolbar. The drop-down list shown in **Figure B** will appear, showing you the most common additions. Click the item you want to add (or click More Commands to see additional options) and Word will add the command to the toolbar.



Figure B

#3: Display and use KeyTips

KeyTips provide you with a display of the keys you can press if you want to navigate through Word using the keyboard instead of the mouse. Press Alt to display KeyTips on the Ribbon. You'll see small boxed characters appear on the major tabs and Quick Access tools in the Word window. When you press one of the characters (for example, pressing I selects the Insert tab), you'll see that all commands on the Ribbon have their own KeyTips. KeyTips will remain on the display until you press Alt a second time to hide them.

#4: Tailor the status bar

The status bar in Word 2007 has a new level of, uh, *status* in Word 2007. You can get more information than ever, simply by right-clicking anywhere on it. When you do, a popup list of available items will appear (**Figure C**). At a glance, you can see helpful things like word count, spelling status, and whether Track Changes is enabled.

But the real purpose of the Customize Status Bar list is to enable you to choose the items you want to see displayed on the status bar. You can add Caps Lock, for example, if you want to see an indicator when you've accidentally pressed the Caps Lock key (or forgotten to toggle it off). To add an item that's not currently displayed, just click it. To hide something you don't want displayed in the status bar, click the item to remove it. (Displayed items appear with checkmarks in the Customize Status Bar list.)

#5: Change the color of Word

You don't have a huge range of vibrant colors to choose from when you want to customize the overall look of the Word 2007 window, but you do have a few options. To change the color of the interface, click the Microsoft Office button and choose Word Options. In the Popular window, click the Color Scheme down arrow. Blue is selected by default; you can also choose Silver or Black. (I know, *yawn*.) Take heart, though—you can wake yourself (and your readers) up with plenty of color by applying Themes and Quick Styles to your actual documents.



Figure C

#6: Modify ScreenTips

Word 2007 includes Enhanced ScreenTips that give you more information about Word commands and procedures. This is helpful when you need to find a command to do a particular thing and can't quite remember what various commands do. (For example, what is the difference between a citation and a cross reference?)

When you point to a command on the Ribbon, Word displays a ScreenTip to give you the basics of the command. By default, Word gives you lots of information. But you can shorten the ScreenTips if you feel you need only little nudges now and then, or do away with them altogether. To change the way ScreenTips appear, click the Microsoft Office button and choose Word Options. In the Popular window, click the ScreenTips Style down arrow and choose the option you want. Click OK to save your changes.

#7: Create keyboard shortcuts

If you're a diehard shortcut key fan, you're probably eager to create your own shortcut keys in Word 2007. To do that, click the Microsoft Office button and choose Word Options. Click Customize and then click the Keyboard Shortcuts button at the bottom of the window. In the Customize Keyboard dialog box (**Figure D**), choose the tab containing the

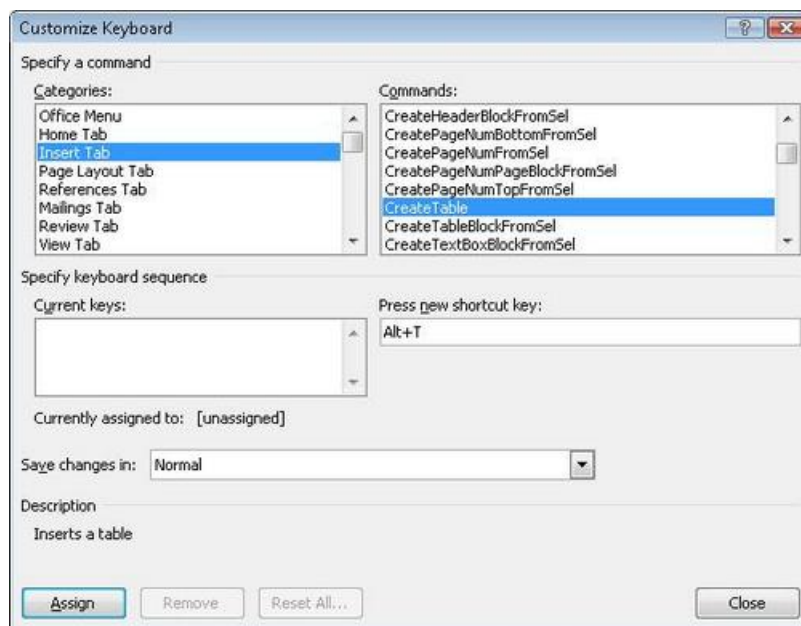


Figure D

command you want to automate. Then, in the Commands list, select the command name. (Notice that these names are the command names as they are known in the program—not as they appear in the Ribbon.) Press the shortcut key you want to assign to the command and click Assign to save the new shortcut key. Click OK to close the Word Options dialog box, and the new shortcut key should be in effect.

#8: Start Word automatically

You can easily have Windows Vista launch Word 2007 at startup by copying Word into your Startup folder. Here's how. Click the Windows Start button and choose All Programs. Click Microsoft Office to display the programs in that folder. Right-click Microsoft Office Word 2007 and choose Copy. Now scroll down to the Startup folder in the All Programs list, right-click on it, and choose Explore (**Figure E**). When the Startup window opens, press Ctrl+V to paste the Word 2007 shortcut you copied into the folder. Now, close the Startup window. The next time you start Windows, Word will start automatically.

#9: Launch Word and open a particular document

If you want Word to open to a specific document each time the program starts, you can use a switch to tell Word which document you want to use. First, click the Windows Start button and select Run. Then, type the path to Word (for example, C:\Program Files\Microsoft Office\Office\Winword.exe), press the spacebar, and

type the switch /t, followed by another space and the name of the file you want to open. If you really like starting Word this way, you can create a desktop shortcut for it by right-clicking your desktop, choosing New, clicking Shortcut, and entering the path and switch in the Location box in the Create Shortcut dialog box.

#10: Change where your documents are stored

You can tell Word to save your documents in a folder of your choosing by clicking the Microsoft Office button, choosing Word Options, and clicking Save. In the Save options, click the Browse button to the right of the Default File Location box and navigate to the folder where you want to store your documents. Click OK to save the location and close the dialog box and click OK a second time to return to your document.

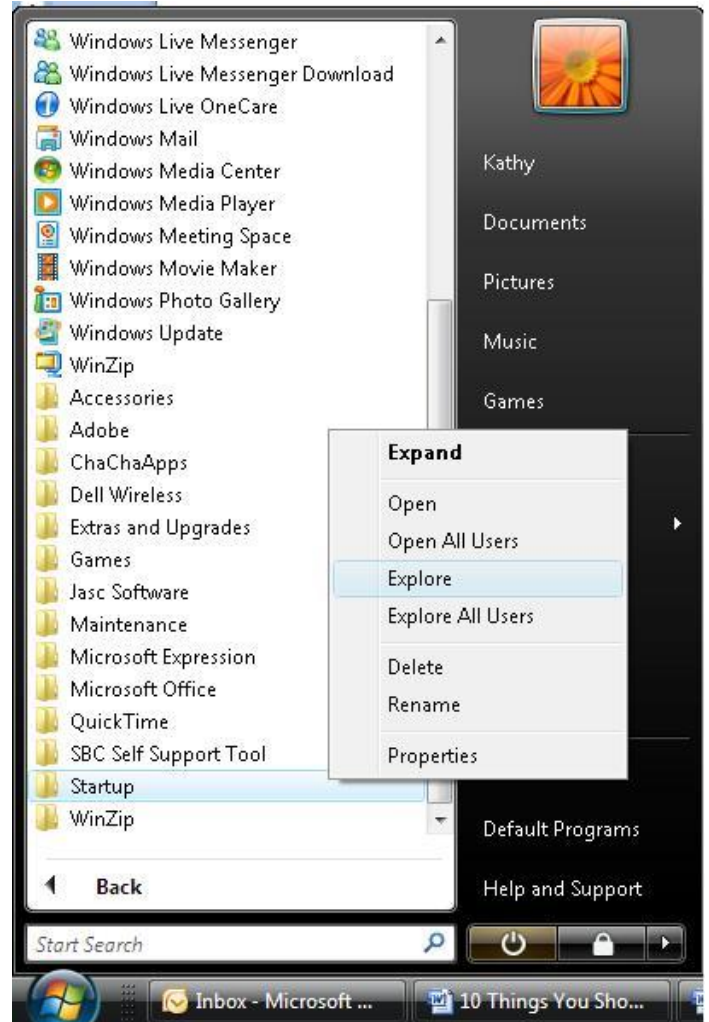


Figure E

Katherine Murray is the author of many computer books (including the in-the-box documentation for Microsoft Office 2007 Professional and Small Business Editions). She also writes digital lifestyle articles for various Microsoft sites and publishes a blog called BlogOffice that shares Microsoft Office ideas, how-to's, and tips.

By Katherine Murray

Word 2007 is full of new tools and options, expanded capabilities, and significant changes. Find out what to focus on and what you can leave for another day (or month, or year...).

#1: The Font dialog box

Thanks to the new Themes feature (which is a great addition to Word 2007), you can skip working with the individual effects that go into controlling the format of your document. Themes include predesigned settings for colors, fonts, and effects, and things like sidebars and quotes have their own styles as well.

Just choose the Page Layout tab, click the Themes arrow, and select the theme you want from the gallery, shown in **Figure A**. The design will be automatically applied. If you want to change the theme later, simply return to the Themes gallery and make another choice. (If you want more granular control, you can still display the Font dialog box by clicking the dialog launcher in the lower-right corner of the Font group in the Home tab.)

#2: Mark As Final

The Mark As Final feature in Word 2007 (available when you point to Prepare after clicking the Office button) has potential, but in this version of Word, it doesn't pack a lot of punch. Even though you can mark your current document as final, when someone else receives the document, he or she can simply make a copy and then edit it as usual. If you want to ensure that nobody is going to change your content or alter your formatting, save the document as a PDF or XPS file instead.

#3: Save As Word XML

XML in Word 2003 was kind of a patch job. As XML became more widely used, developers knew they needed to include a way for Word users to save files in XML format and use XML data in their Word documents. The attempt to add XML to Word 2003 created huge, clunky files that you had to save intentionally in XML format by using the Save As XML command.

Although you can still, if you choose, save a file in that old Word XML format, trust me—you won't want to do that. Today's Word is completely built on Office OpenXML, so now all the files you create and save in Word 2007 are actually saved in XML.

What does this mean to you? The short answer is that resulting files are much smaller and cleaner. The longer answer includes better security and reliability and an easier exchange with other applications (including nearly seamless integration with SharePoint sites).

The only downside to the new format is that it is incompatible with pre-2007 versions of Word, so to send a document to a Word 2003 user, you still have to use Save As and save the file in the Word 97-2003 format (or simply send your coworker a link to the Word 2007 conversion utility, available free of charge on the Microsoft Downloads site).

#4: Mail Merge Wizard

If you like programs to walk you through every step of a process, you may be fond of wizards. But in Word 2007, the whole mail merge process has been given higher visibility (thanks to lots of feedback from Word users about mail merge frustrations) and assigned its own tab in the Ribbon. Now you can work through your mail merge

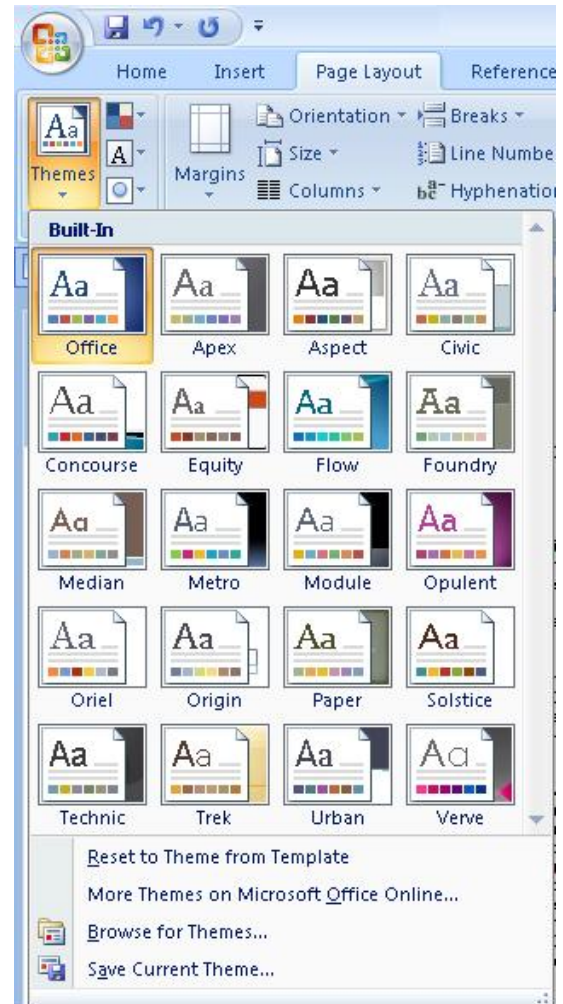


Figure A

projects, whether they are simple or complex, by simply following the selections on the Mailings tab (**Figure B**). If you still want to consult the wizard for a little extra support, you'll find it by clicking the Mailings tab, choosing Start Mail Merge, and selecting Step By Step Mail Merge Wizard at the bottom of the command list.

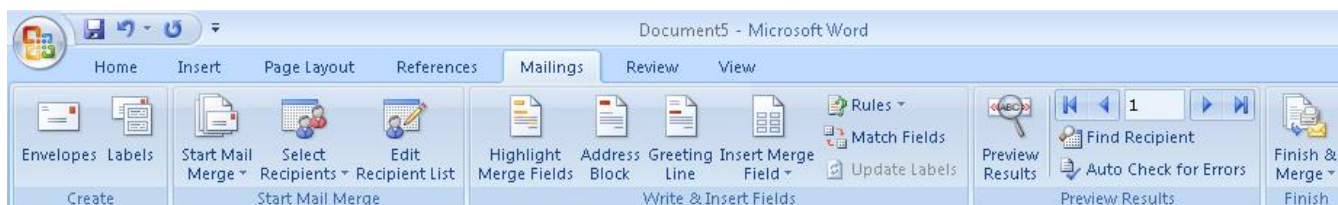


Figure B

#5 Drawing Canvas

The Drawing Canvas was a big deal in earlier versions of Word, but it's a bit of a dinosaur in Word 2007. In this version, it is so easy to draw, arrange, group, and work with shapes and images in your Word documents that the Drawing Canvas really isn't needed to tie everything together the way it once was. Now you can assemble your shapes directly on the document, group them, and work with them as a single object. The Drawing Canvas has an annoying way of bumping everything on your document to another place on the screen, and for most custom drawings I do in Word, I prefer to draw directly on the page.

#6: Signature Line

Tucked away in the Text group of the Insert tab in Word 2007, you'll find the Signature Line command. This is another one of those features that has potential but doesn't carry a lot of clout. When you first click Signature Line, a popup message box appears, warning you that although you can use a digital signature to help identify the authenticity of a document, this type of signing may or may not hold up in court. The message points you to digital signature services on Windows Marketplace, where you can find digital services that pack a bit more punch.

#7: Web Tools

Are you wondering where Web support went in Word 2007? Although Web Layout view still exists in Word 2007, a number of the Web tools have been removed. For example, there's no longer support for adding movies or sound to your Web page (those commands used to be on the Web Tools toolbar), and many of the browsing buttons you could use while working in Word have been removed. (If you want, however, you can add in some navigation controls by displaying Word Options, choosing Customize, and selecting All Commands.)

You can still save a document as a Web page and view it in Web Layout view so that you know what it will look like when you save it. But for more detailed Web work, you may want to check out Microsoft Expression Web, the new replacement for FrontPage. Another alternative is to use the (awesome) new blogging feature to publish your thoughts directly to a blog. You'll find Word 2007's blogging capability tucked away in the Publish options. Click the Office button, choose Publish, and click Blog to get started.

#8: Document Map

Okay, well, this one is a bit of a red herring. I wouldn't suggest that you skip the Document Map if it's a feature you use often, because it's actually one of my favorite ways to navigate (and review) long documents in Word. But if you like quick and easy methods for reviewing your long documents, you'll love the new Thumbnails view (**Figure C**). Now you can look over the section headings in Document Map and then switch to Thumbnails view (click the View tab and click Thumbnails in the Show/Hide group) to get a miniature view of each page in layout form. This enables you to see how your document flows, check the placement of tables and pictures, and just generally get a feel for whether your document is ready to roll.

#9: Microsoft Clip Organizer

This may be personal opinion shining through, but it's hard to imagine that the Microsoft Clip Organizer really makes anybody's life easier. The process for searching for and adding pictures and clipart is seamless in Word 2007, and the increased prevalence of DSL and T1 connections makes grabbing images online easier than ever.

Unless your job (or your hobby) requires you to gather huge collections of images that you are sure you will use again later, why take the time to set up, sort through, and manage all those image files in Microsoft Clip Organizer? (If you're a media file maven, consider switching to Windows Vista—the media file management features alone make it worth the stress of upgrading.)

#10 Document Properties

By clicking the Office button, choosing Prepare, and clicking Properties in Word 2007, you can display the Document Properties area at the top of your document and enter information about the file—such as your name, the title, the status, and a brief description. That's fine if you have a lot of time to kill and don't expect other people to actually read the document. But if you simply want to make sure the author's name appears on the doc and that it's tagged appropriately so you can find it again later in a search, you can do that quickly and easily when you save the file. To add the author's name and tags, simply click in the respective boxes in the Save As dialog box, shown in **Figure D**, name the doc, and save it by clicking Save. Easier and faster, with fewer keystrokes. Nice.

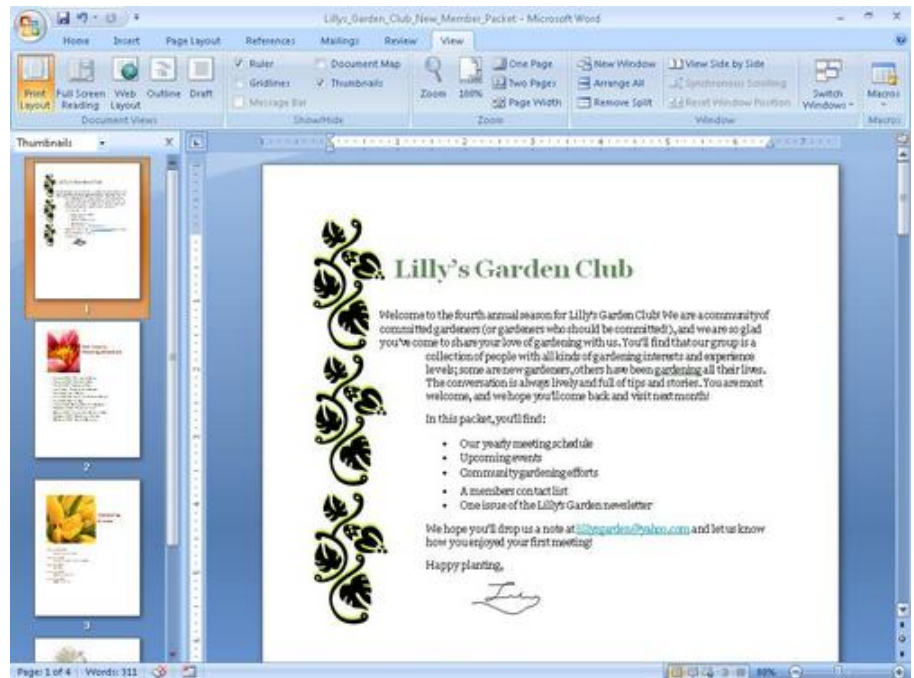


Figure C

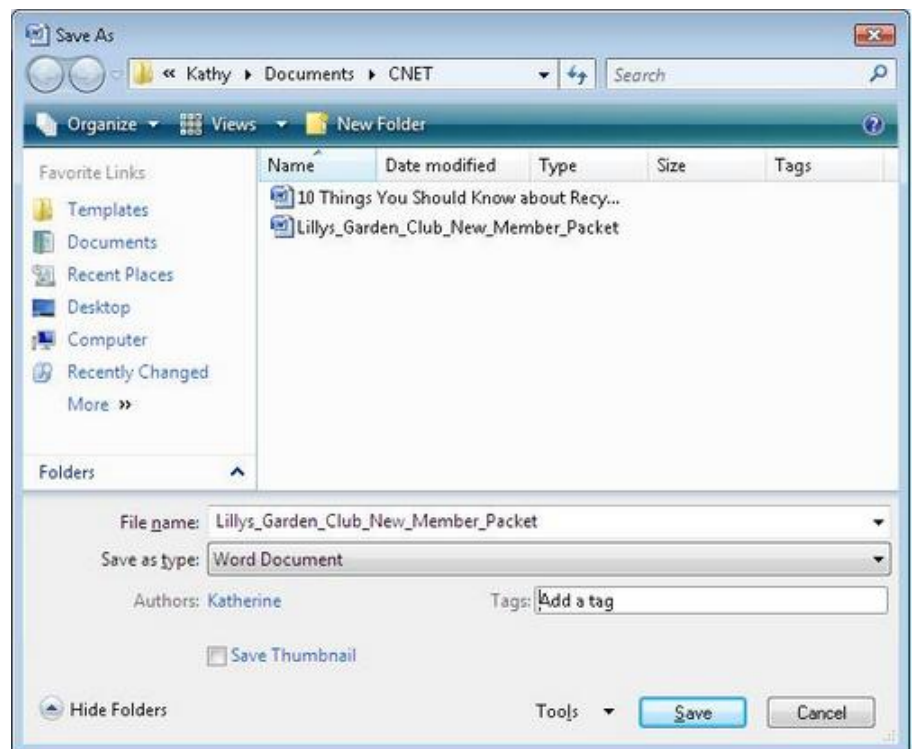


Figure D

By Craig Stinson

Given the learning hurdle that comes with an entirely revamped (albeit improved) user interface, Excel 2007 must offer significant enhancements to encourage you to upgrade. Herewith, my top 10.

1 Make the Ribbon work for you

The Office 2007 redesign includes some radical new interface elements aimed at making it easier find the features you need and execute tasks more efficiently. The most prominent of these new elements is the Ribbon, which offers task-oriented tabs with commands readily available instead of hiding in a menu structure.

For some users, this will definitely be an enhancement, but it's hard for others to see past the changes.

From the absence of a "classic mode" in Excel 2007 (and the other Office programs that use the Ribbon), one could draw either of two conclusions:

- ◆ Microsoft was so sure the Ribbon UI would be a boon to mankind that it didn't think anyone would care to look back
- ◆ Microsoft was so nervous about Ribbon adoption that it didn't dare give us a way to look back.

Whichever it is, many users are finding that mastery of the new interface is a slow go. Here are some ways to mitigate the pain.

First, keep Microsoft's [Interactive Excel 2003 to Excel 2007 command reference guide](#) close at hand. With this handy tool, you can click on an old-style menu command and read a tip describing the Ribbon equivalent (**Figure A**). To get to the guide from within Excel, click the Help button and enter *interactive* in the Search field. If you use it regularly, open it in your Web browser, then drag the icon to the left of the URL in the browser's Address Bar to your Quick Launch toolbar or desktop. You might even want to install Microsoft's [Get Started Tab for Excel](#). It's a free download that places a Get Started tab on the Ribbon, with options for accessing demos, online tutorials, videos—and the aforementioned Interactive Command Reference Guide.

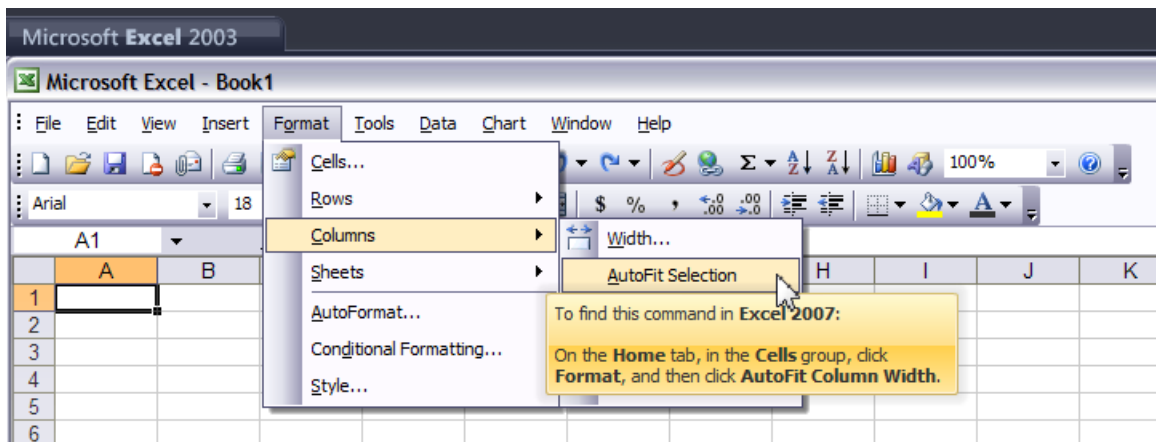


Figure A

Want a more permanent set of training wheels? Install the Excel version of [Classic Menu for Office 2007](#) (See ["Add Office 2003 tools and menus to your Office 2007 interface"](#) for more details). This add-in makes a great learning tool, and if you really hate the Ribbon you can use the add-in exclusively.

Finally, if you liked to customize the old menu system and miss the ability to do that in Excel 2007 (we don't count the Quick Access Toolbar as a proper customization tool), check out Patrick Schmid's [RibbonCustomizer](#). This add-in lets you rearrange the Ribbon by filling out a simple dialog box; no programming is required.

2 Create consistent, appealing formats with styles and themes

Styles, always the *smartest* way to format Office documents (because they let you change your mind without having to reformat every heading and table), have not always been the *easiest* way. That's changed now. Excel 2007 offers several kinds of styles, including cell styles, table styles, chart styles, and PivotTable styles.

Cell styles provide a quick way to emphasize "good," "bad," and "neutral" values (see also the new conditional formatting features, described below), as well as to distinguish the functional sections of a worksheet (data from calculations, for example). Table, chart, and PivotTable styles (which appear on the Design tab when a table, chart, or PivotTable is selected) can make your work presentation-worthy with a single click.

Because styles are linked with the set of display themes shared by Word, PowerPoint, and Excel, they can also help you create a consistent look to your work—consistent within itself and consistent with your company's design guidelines.

3 Build bigger, more capable, worksheets

It's certainly possible that the old worksheet capacity—65,536 rows by 256 columns (16,777,216 cells) was quite enough. But just in case, Excel 2007 has expanded to allow 1,048,576 rows and 16,384 columns (a whopping 17,179,869,184 cells). If you import from large corporate databases, you might actually find the new limits invaluable. And even if you don't, there are plenty of other increases to enjoy. To name just a few: When sorting, you're no longer limited to three fields; you can specify up to 64. You can now stuff as many as 10,000 characters into a formula (a tenfold increase), and your functions are no longer limited 30 arguments (with the new limit of 255, they can argue till they're blue in their faces). Formulas are also no longer restricted to seven levels of nesting (the new limit is 64).

4 Check out Excel's new conditional formatting features

With cell styles, you can mark bad or good values statically. With conditional formatting, you can do it dynamically, so that, for example, spending figures turn red only when they exceed associated budget values.

The conditional formatting features are significantly easier and more versatile in Excel 2007. You can do more without writing formulas. For example, menu picks now let you flag such conditions as "top 10 %" or "Above Average." And there are some nifty new display options. With data bars, for example, your numbers can appeal to the left and right brain hemispheres simultaneously, and in the same column (**Figure B**). With color scales you can create "heat" diagrams—e.g., red for high numbers, green for low ones. With icon sets you can flag values with traffic lights, arrows, and other easily recognized symbols.



Figure B

5 Turn ranges into tables

Pressing CTRL+T within a worksheet range turns that range into a *table*, a formal entity that's mostly new in Excel 2007. (Excel 2003's *list* was a weak forerunner.) Tables offer several advantages over ordinary ranges.

- ◆ You can apply styles to them that do such things as apply horizontal banding—formatting that alternates by row so your eye can more easily follow a row across the table. If you did this (manually) in the past, your banding turned to hash as soon as you sorted the range. Now it stays put no matter what you do.
- ◆ Tables expand intelligently as your data grows. Add a row or column, and all formatting and formulas welcome the new data. Charts built from table columns also expand automatically.
- ◆ Calculations performed on table constituents can use *structured referencing*—references that identify table cells by their column headings or row positions.
- ◆ You can toggle a total row on or off, displaying sums, averages, and other aggregate calculations when needed.

6

Let Formula AutoComplete assist with function building

As soon as you type an equals sign followed by a letter, Excel displays the names of all available functions starting with that letter. Type another letter and the list narrows, and so on. Select an item in the list, and a tip appears describing the selected function. If you then press the parenthesis key, the tip changes to enumerate the function's arguments. Macro programmers have long had this kind of help available for VBA functions; now regular spreadsheet jockeys can enjoy the same assist.

7

Build prettier charts with fewer clicks

The Ribbon is clearly a boon for chart-makers. When you select a data range (or a single cell within a range) and click the Insert tab, the major chart types appear as separate icons within a Ribbon command group. Click one of these major types (Column or Pie, for example), and a gallery of subtypes appears. Once you've planted your chart on the worksheet, three new Ribbon tabs arrive, giving you similarly direct access to nearly all the formatting features you'll need. If you still want to dig deep into the formatting dialog box, you can do so, but most of the time it won't be necessary.

Microsoft disappointed a good many users by not adding new chart types in Excel 2007. But the old standbys have a new look and can dazzle with more razzle. On the Format tab, for example, you'll find a gallery of Shape Effects that let you dress up your charts with glow, soft edges, bevels, and shadows. Best of all, perhaps, Excel now shares its charting engine with Word and PowerPoint.

8

Find new ways to filter

Probably the coolest change to Excel's Filters (which used to be called AutoFilters) is that they recognize the type of data included in a column and offer options appropriate to the data type. If you filter a column of numbers, for example, the options include such things as Top 10 (it's really top or bottom n ; you can pluck out the highest three values, lowest 17, or whatever you need), Above Average, and Below Average. For text, you can do Begins With, Ends With, or Includes. And for dates, you get a huge assortment of intelligent filtering choices: Tomorrow, Today, Yesterday, Next Week, This Week, Last Week, Year to Date, and so on.

The second coolest change is that you can filter a column on multiple discrete values. If your column includes North, South, East, and West, for example, you can use check boxes to restrict it to North and South, omitting East and West. Seems like a no-brainer, but there was no straightforward way to do this in Excel 2003.

9

Make your PivotTables easier to read; build them with less frustration

Microsoft has improved Excel's PivotTable user interface with each new version, in an effort to make this extraordinarily valuable functionality less intimidating. In Excel 2007, you can populate a PivotTable by selecting field-heading check boxes as well as by dragging field headings onto a table layout (or into a task pane). These changes are marginally useful. More important, the 2007 interface includes some new context menus that make it easier to filter and sort (and you can use all the type-specific filtering options mentioned earlier). With the help of PivotTable styles (which appear on the Design tab when a PivotTable is selected), you can apply formatting that remains stable as the table pivots. And new layout options (Compact, Outline, and Tabular) afford greater legibility to complex tables.

10

Reduce layout aggravations with Page Layout view

Excel 2007 includes a new viewing option that shows page boundaries as you work (click Page Layout on the View tab to get there). This is essentially an enhanced version of the Page Break Preview mode that has been available in earlier versions. The principal difference is that Page Layout view is fully functional and interactive. That is, you can build your worksheet in it, noting how columns and rows will (or won't) fit as you create them. On older hardware, you might notice a small performance degradation if you work this way.

By Debra Littlejohn Shinder, MVP, MCSE

Creating impressive slideshow presentations just got easier with Microsoft's latest version of PowerPoint. With a new interface, new templates, and new artwork and formatting options, PowerPoint 2007 makes it a no-brainer for you to give your presentations a polished, professional look and convey information in ways that grab and keep your audience's attention.

Let's take a look at some of the key enhancements and new ways of doing things in the new PowerPoint.

#1: The Ribbon interface

The new user interface that's common to the main Office 2007 programs has gotten all the attention — and not all of it positive. It takes some getting used to, but many users who've given it a chance find it to be more intuitive and quicker to use than the old menu system.

The Ribbon uses tabs to group commands and features in logical, task-oriented categories. In PowerPoint 2007, in addition to the familiar Home, Insert, Review, View, and Add-ins tabs, which are common to other Office programs, you'll find tabs labeled Design, Animations, and Slideshow that are dedicated to those presentation elements, as shown in **Figure A**, **Figure B**, and **Figure C**.



Figure A: The Design tab allows you to choose page setup, themes and background.



Figure B: The Animations tab makes it easy to create animations and slide transitions.

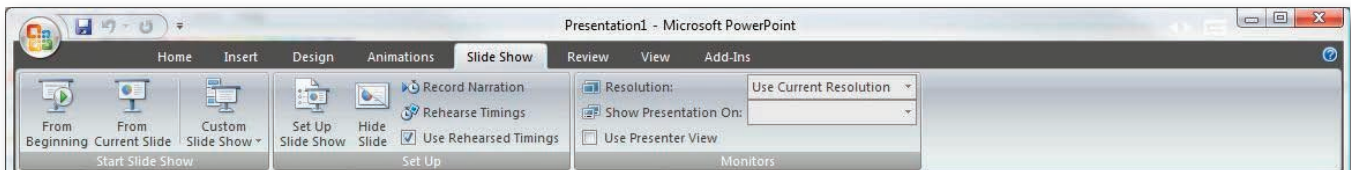


Figure C: The Slide Show tab is used to set up and play the show and control monitor settings.

#2: The Quick Style gallery

The new Quick Style gallery, with new themes, helps you to put together professional-looking presentations much more quickly because you don't have to select colors and style options individually. Now you can be sure that your graphics elements, tables and charts all match. When you apply a new style or theme, all of these elements change so that they go together and use the same color set.

You can choose from many built-in color schemes, as shown in **Figure D**, or you can create your own custom themes.

When creating a new custom theme, you can set colors for various components, as shown in **Figure E**.

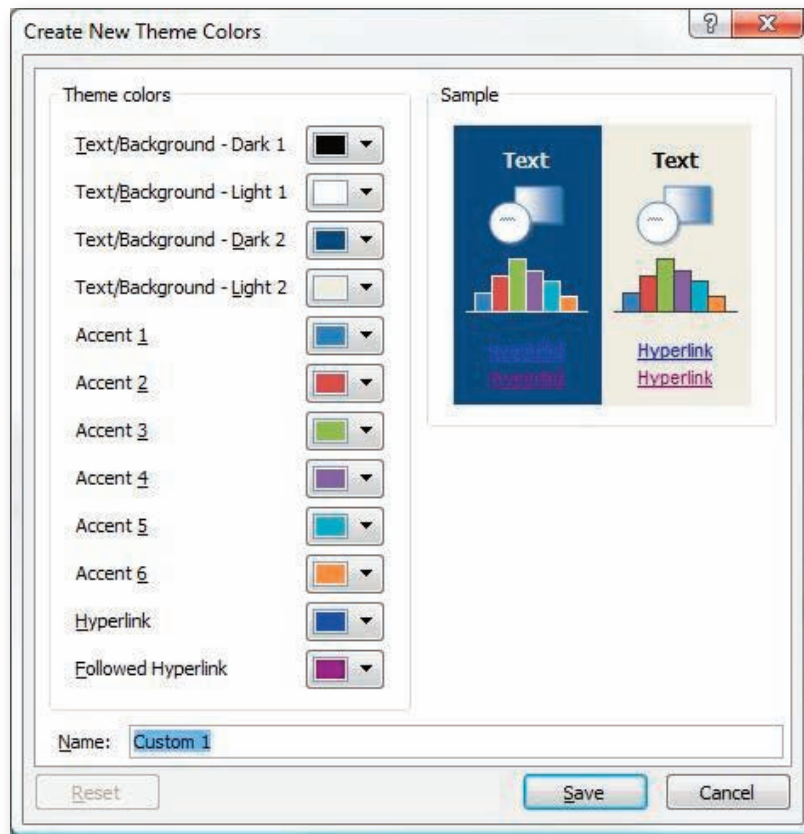


Figure E: You can set colors for many different elements when you create a custom theme.

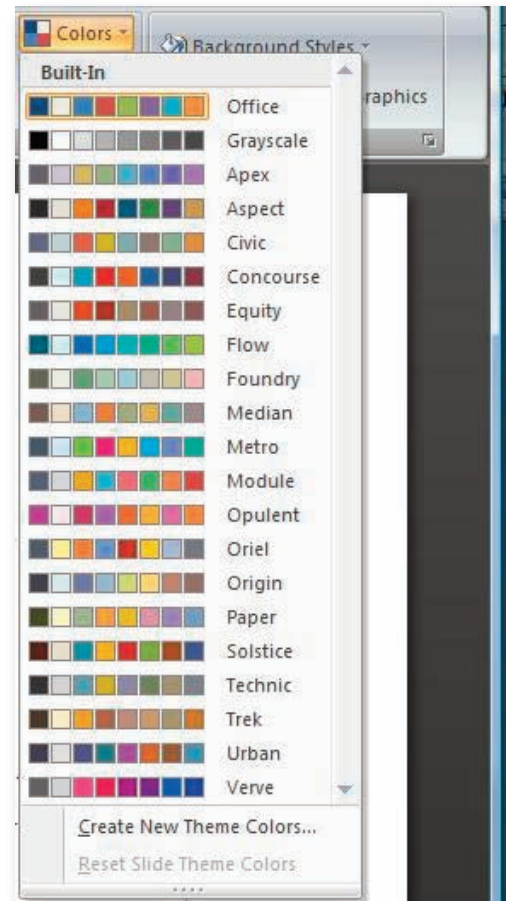


Figure D: You can select from built-in color themes or create your own.

The Quick Styles gallery changes to coordinate with whatever theme you've selected, too. That means that elements such as SmartArt graphics will be automatically color coordinated with the rest of the elements in the presentation.

#3: SmartArt

With PowerPoint 2003, you can insert WordArt or AutoShapes, but PowerPoint 2007 adds the concept of SmartArt. SmartArt graphics are visual representations of information and ideas that are color coordinated and pre-constructed for common purposes, such as listing a number of components or subjects, showing hierarchical relationships, illustrating the steps of a process or procedure, creating a matrix, and so forth.

SmartArt graphics are easily added from the Insert tab, and as **Figure F** shows, you have dozens of graphics to pick from..

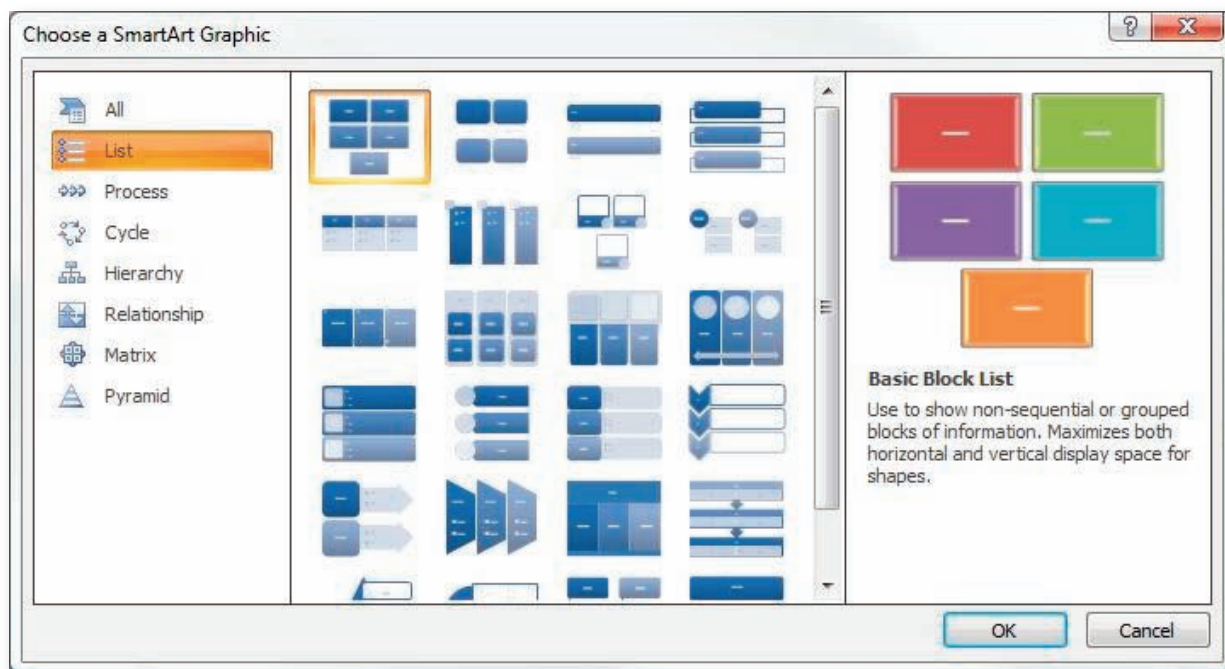


Figure F: SmartArt graphics help you dress up a presentation quickly and easily.

When you've inserted a SmartArt graphic, the Design tab opens and changes to provide options for editing the graphic you've selected. You can change colors or apply a 3D effect to the graphic by selecting from SmartArt Styles in a drop-down list, as shown in **Figure G**.

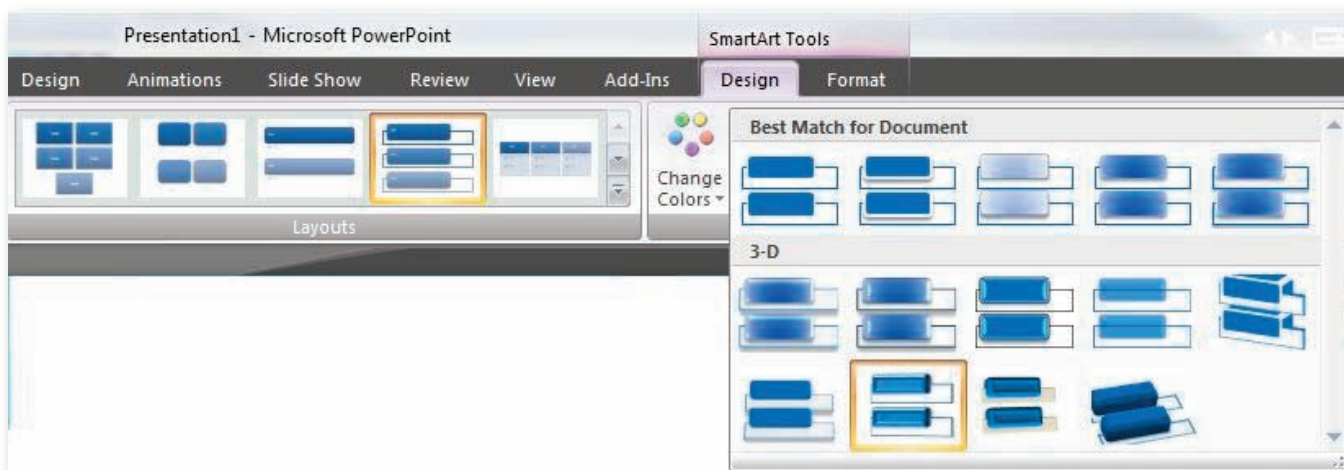


Figure G: SmartArt graphics can be edited to change colors or apply 3D effects.

#4: Better tables and charts

Tables and charts are important elements of many slide presentations, and PowerPoint 2007 makes it easier to create and edit them. It's simpler to cut and paste information from Excel spreadsheets, and adding a table or chart to a slide is a point-and-click operation that's done from the Insert tab.

There are also many more built-in chart styles, as shown in **Figure H**, and they're easier to select and work with. The new Table insertion tool makes it simple to highlight the columns and rows that you want your table to contain, as shown in **Figure I**.

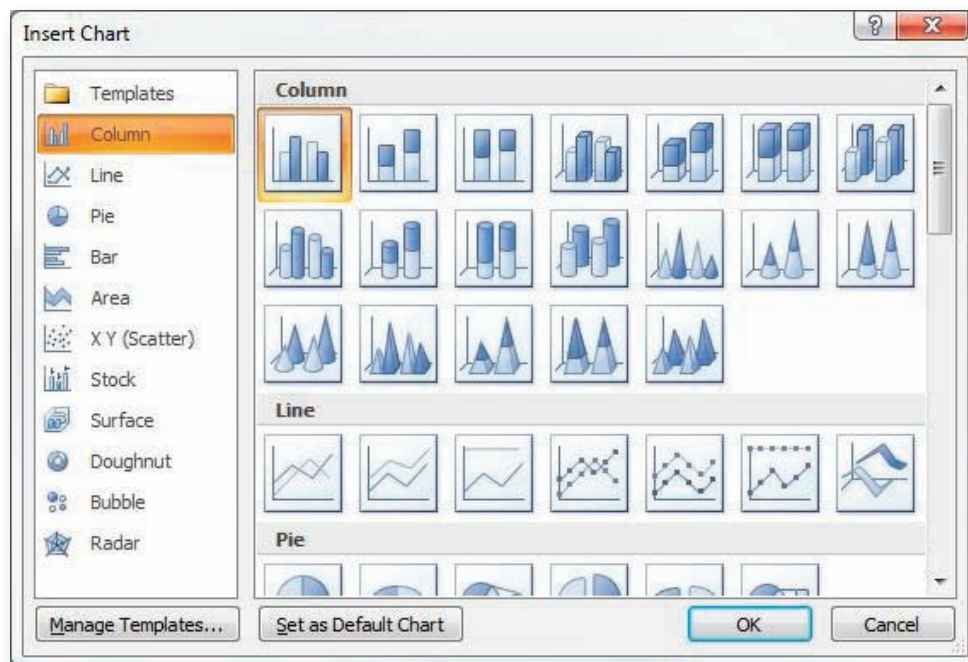


Figure H: Selecting and working with charts is easier in PowerPoint 2007.

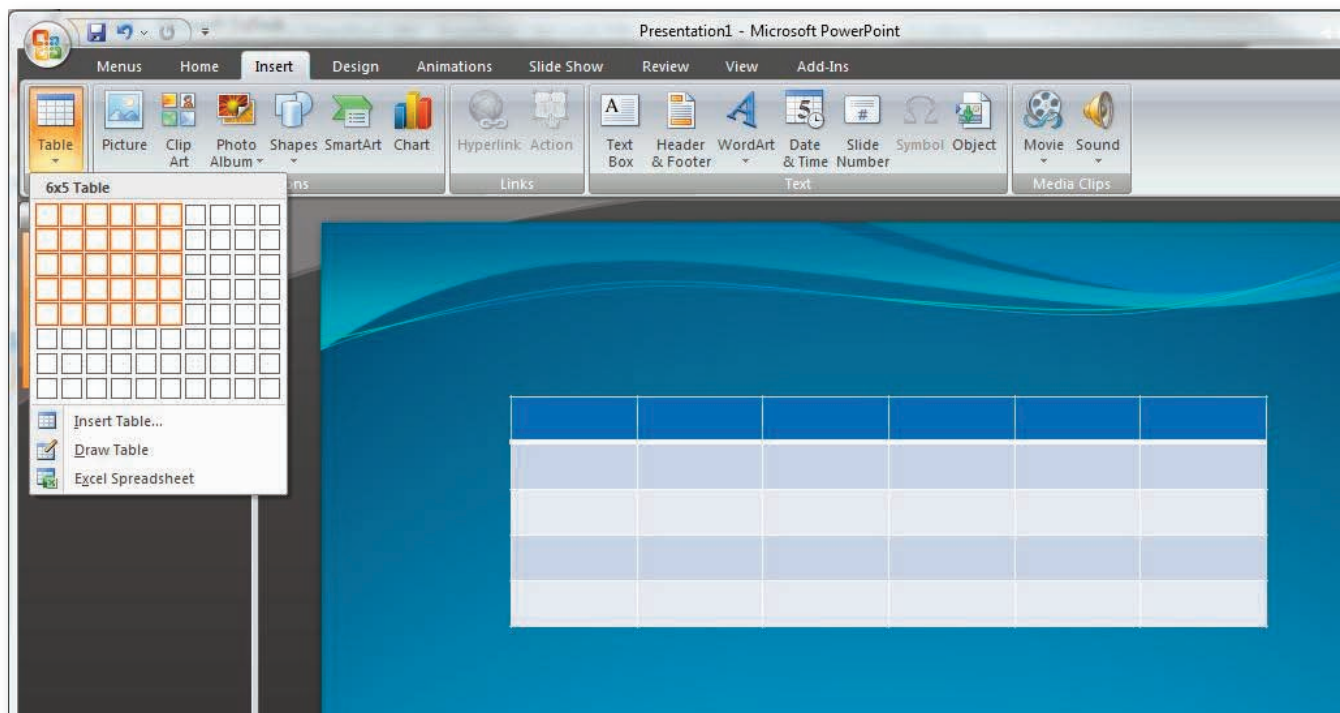


Figure I: Columns and rows appear in your slide as you highlight boxes in the Table tool.

#5: Live preview

One of the coolest and most useful features of PowerPoint 2007 is the live preview feature. You can see how various color themes, fonts, and effects will look on the slide before selecting them.

For example, if you click the Colors down arrow in the Themes section of the Design tab, as you scroll through different themes, they are instantly displayed on the slide.

The same thing happens as you move your cursor over different fonts in the drop-down box shown in **Figure J**. The font instantly changes on the slide so you can see exactly what it will look like if you select that font.

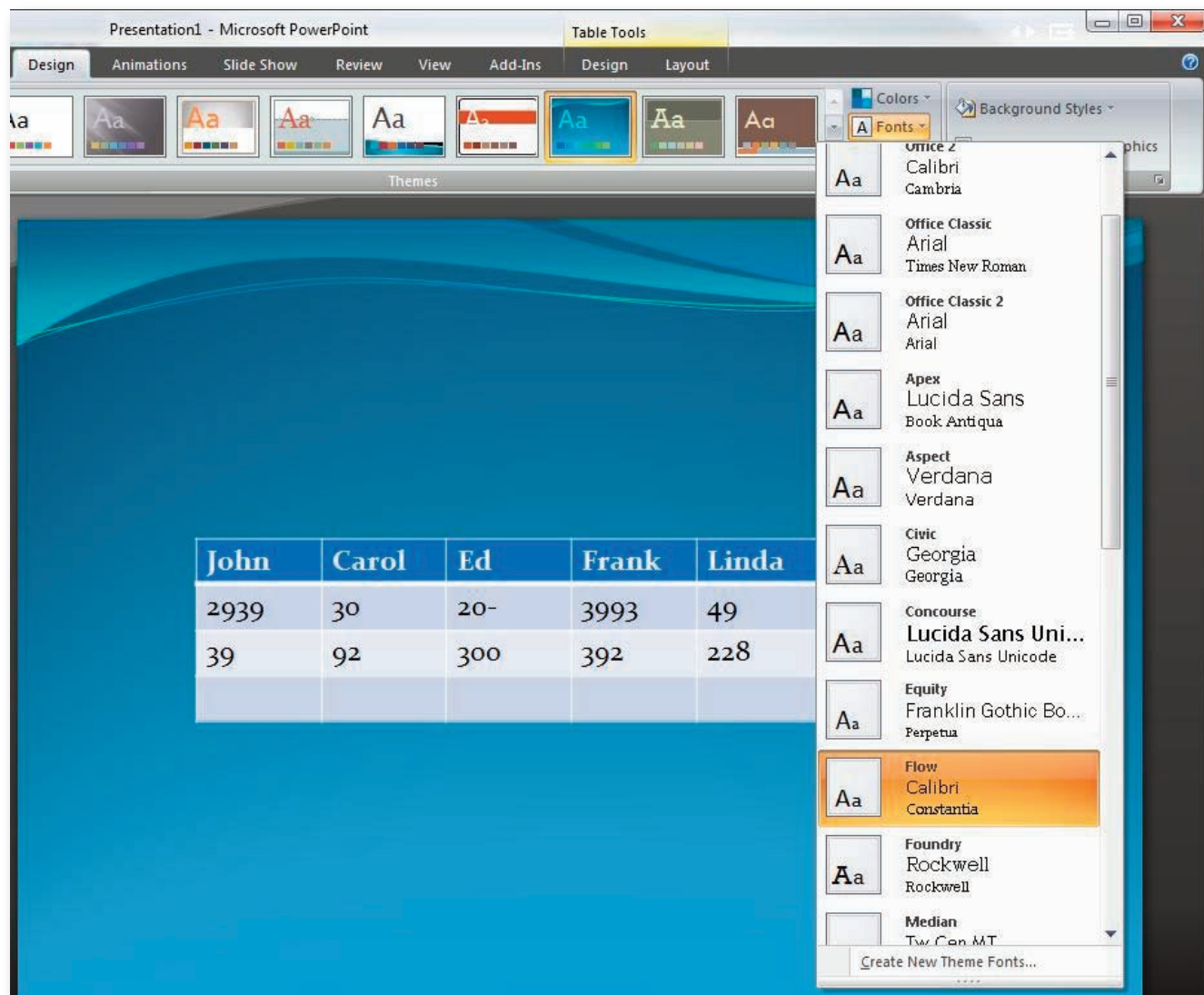


Figure J: Fonts, colors and effects change instantly as you highlight them so you get a preview of exactly how they will look on the slide.

#6: Presenter view

Another new feature in PowerPoint 2007 is the ability to run the presentation on one monitor while the audience views it on a second monitor. In Presenter view, what you see on your monitor (for example, your laptop) and what the audience sees on the second monitor (for example, the projector screen) are different.

The audience sees only the slide itself. But you see the current slide along with your speaker notes and previews of the next several slides in sequence. You can click any of those slides to go to it instantly, and you can darken or lighten the audience screen without affecting your own.

To turn on Presenter view, you select the Slide Show tab, click Set Up Slide Show from the Set Up group, and select the Show Presenter View check box in the Set Up Show dialog box, as shown in **Figure K**.

Figure L shows the Presenter view that appears on your monitor on the left and the slide that displays on the audience's screen on the right.

#7: Smaller file size, better file format

Elaborate slide presentations can result in very large file sizes, especially if you use many graphics, embed video, etc. This may make it difficult to e-mail PowerPoint presentations to others because of mailbox limitations.

The new XML-based file format used by default in PowerPoint 2007 (.PPTX) reduces file sizes because the files are compressed. This makes them significantly smaller, sometimes up to 75 percent. XML-based files are also easier to recover if some elements in the file are corrupt or damaged.

If necessary for compatibility with older versions of PowerPoint, you can also save files in the PowerPoint 2003 (.PPT) format.

#8: Save as PDF or XPS

Now you can save PowerPoint presentations as PDF or XPS files. This makes it easier to share them with people who don't have PowerPoint or who are using non-Microsoft operating systems, because these are standardized formats that can be opened across platforms.

Saving in one of these fixed-layout formats also ensures that your presentation will stay exactly as you created it, since they can't easily be edited. It's also easy to print files saved in PDF or XPS, since "what you see is what you get" in terms of the layout.

To save PowerPoint 2007 presentations in PDF or XPS, you first need to [download the free add-in from Microsoft](#). Once you install the add-in, just click Save As on the Office menu and select PDF from the Save As Types drop-down list.

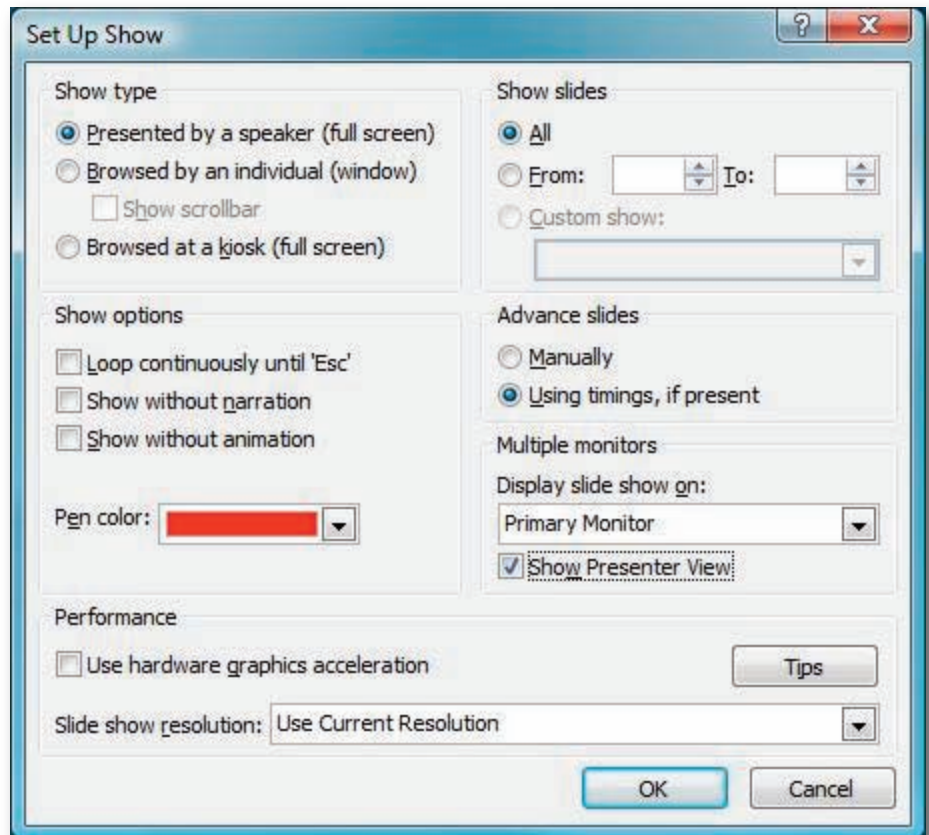


Figure K: You can select Presenter view in the Set Up Show dialog box.

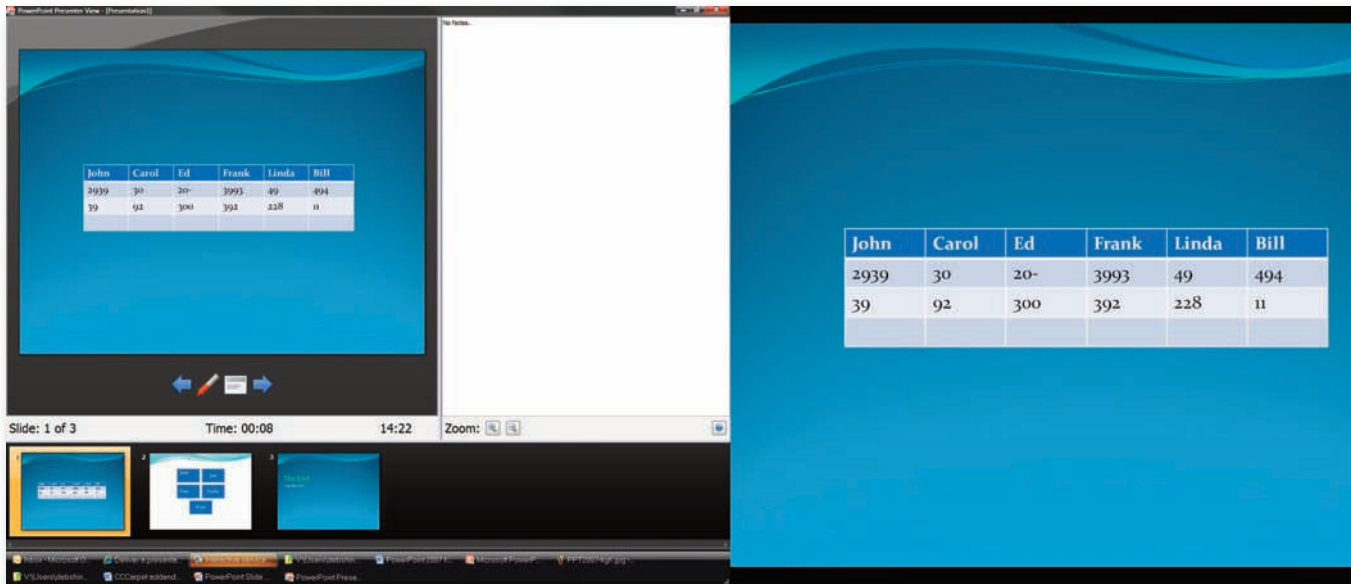


Figure L: Presenter view displays speaker notes and slide previews on your monitor and only the slide on the audience's screen.

#9: Remove hidden information

Office 2007 programs, including PowerPoint, benefit from the new Document Inspector feature that makes it easy for you to check your presentation to ensure that no hidden personal information or other metadata is contained in the file before you share it with others. Especially if the presentation has been through a review process, there could be comments, annotations, and so forth, still contained in the file but not immediately visible. You might not want others to be able to see your presentation notes or off-slide content, either. To use the Document Inspector, select Prepare from the Office menu and then select Inspect Document, as shown in **Figure M**.

#10: Secure your presentation

Sometimes, the information we include in our PowerPoint presentations may be confidential. For example, you might have a slideshow prepared for company executives that contains trade secrets or financial information. There are more ways than ever built into PowerPoint 2007 to help you protect sensitive information in a slide show:

- ◆ You can add digital signatures to the PowerPoint file to authenticate the identity of its creator and to verify that the content hasn't been changed since it was signed.
- ◆ You can encrypt the presentation.
- ◆ In the Windows Rights Management Services environment, you can restrict permission so that users with whom you share the presentation can't copy, print, or edit it.

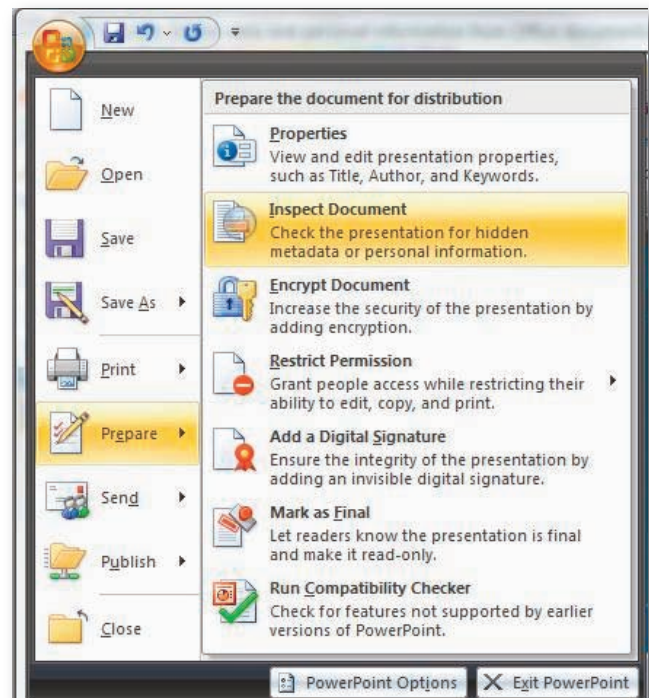


Figure M: You can inspect your presentation for hidden data before distributing it.

All of these security mechanisms can be invoked from the Office | Prepare menu.

By Jim Boyce

1 The Ribbon

If you have used other Office 2007 applications, you are no doubt familiar with the Ribbon -- and you either love it or hate it. Outlook 2007 uses the Ribbon, too, but not to the extent of other Office applications.

The main Outlook window doesn't use the Ribbon, but most of the forms do. For example, start a new e-mail message or appointment, and the resulting Outlook item form includes the Ribbon. As in other Office 2007 applications, the main appeal of the Ribbon is that it exposes commonly used features. What's more, the Ribbon exposes useful features that many users don't know about or don't bother with because they don't want to spend the time hunting for the feature.

I've been using Office 2007 since the earliest beta and didn't discover until this week that you can minimize the Ribbon. Right-click on any group on the Ribbon and choose Minimize The Ribbon. Take the same action to restore it.

2 Navigation Pane and To-Do Bar

Outlook's Navigation Pane provides a quick and easy way to navigate Outlook's folders, views, calendars, date navigator, and other items. When Microsoft introduced the Navigation Pane in Outlook 2002, it was a big improvement over the Outlook Bar. There are a couple of nice additions to the Navigation Pane in 2007.

You can now minimize the Navigation Pane to gain more screen real estate for messages, the calendar, and other views. To minimize the Navigation Pane, click the double left chevron in the upper-right corner of the Navigation Pane. This control changes to a double right chevron. Click that to restore the Navigation Pane.

When the Navigation Pane is minimized, it acts like the Windows task bar in auto-hide mode. Just click on the Navigation Pane to open it. After you select an item from the Navigation Pane, it minimizes itself again. If you don't want to use the Navigation Pane at all, choose View | Navigation Pane | Off to turn it off. Choose View | Navigation Pane | On to turn it back on.

The To-Do Bar works much the same way as the Navigation Pane. You can configure the To-Do Bar to be minimized from the View menu. Then, when you need to use it, click on the double chevrons to expand or collapse it. You can also click on an area of the minimized To-Do Bar to temporarily expand it."

3 RSS feeds

RSS, or Really Simple Syndication, is essentially an XML-based means to format news stories and other dynamically changing Web content so that RSS-aware software applications can access and retrieve this content automatically. Outlook 2007 supports RSS feeds, enabling you to receive information automatically from news and other Web sites that offer RSS content. RSS content arrives in Outlook much like e-mail messages and is stored in the RSS Feeds folder by default.

The easiest way to add a feed is to click on the RSS Feeds folder and then click on one of the featured feeds in the resulting RSS directory. You can also right-click on the RSS Feeds folder and choose Add A New RSS Feed to open the New RSS Feed dialog box, in which you enter the URL for the feed. To modify an existing RSS feed, choose Tools | Account Settings and then click the RSS Feeds tab. Here, you can set the synchronization schedule, change the folder to which new items are delivered, remove a feed, and make other configuration changes for the feed.

4 Instant Search

Instant Search is one of those features you'll come to love in a hurry. Instant Search in Outlook 2007 integrates Outlook with Windows Desktop Search to enable you to almost instantly locate items in Outlook. For example, you can type in a word or phrase and find every e-mail in the current folder that contains that word or phrase. You can also expand the search to incorporate all mail folders, including those stored in your archive folders.

Windows Desktop Search is included with Windows Vista. To use Windows Desktop Search on a Windows XP computer, you must [download it](#) from Microsoft. (For a look at how to use Desktop Search in Windows XP, see ["Add Vista-like search capabilities to Windows XP."](#))

Searching in Outlook 2007 is easy. Just click in the Search Inbox field located at the top of the current message window, type a word or phrase, and press ENTER. Outlook performs a search and displays a list of matching items in the window. Click Try Searching Again In All Mail Items to expand the search to all message folders. Click the X beside the search box to clear the search.

5 Color categories

Categories in Outlook help you organize and locate information. They've been improved in Outlook 2007 with the introduction of color. Previous versions of Outlook offered colored flags you could use to identify items, but they were text-based categories. Now they've been replaced by color categories in Outlook 2007. The category color appears in the message header and in the Categories field in the header list. The main advantage of using color categories is that they make it possible to quickly identify items based on their category.

To assign a category, click the item and then click the Categorize button in the toolbar. You can select an existing color category from the resulting drop-down list, or click All Categories to create and assign a new category. The first time you use a color category, Outlook gives you the opportunity to rename it. Just type a new name in the resulting Rename Category dialog box and click Yes. If you don't want to rename the category, click No.

You can easily organize a view by category. Simply click the Categories header to group by color category. You can also use a predefined Categorized Mail search folder to locate all message that have category assignments.

6 Quick click category

Another handy color category feature in Outlook 2007 is the quick click category. This feature lets you assign a color category to a message with a single click.

To set the quick click category, click Categorize in the toolbar and then click Set Quick Click to open the Set Quick Click dialog box. Select the desired category and click OK. To apply the Quick Click Category to an item, just click in the Categories field for the item.

7 Flag recipient for follow-up

You're probably familiar with Outlook's follow-up feature that lets you set a follow-up flag for items. For example, you might want to flag a message to follow up the next day with a phone call. A handy feature in Outlook 2007 is the capability to flag a message for a recipient to follow up.

For example, assume you want the recipient to take action by the end of the week on a message you send. When you are ready to send the message, click the Follow Up button in the Options group on the Ribbon, then choose Flag For Recipients. In the resulting Custom dialog box, choose the desired follow-up action from the Flag To drop-down list. Specify a reminder day and time and click OK. Then, send the message. When the reminder time arrives, the recipient will receive an Outlook reminder regarding the item.

8 Calendar overlay

If you manage multiple calendars, you'll really appreciate Outlook 2007's new calendar overlay feature, which lets you combine multiple calendars into a single view. For example, you might track your personal appointments on a separate calendar from your business appointments. Or maybe you want to merge a sports calendar with your work or personal calendar, or look at two or three staff members' calendars in one view. Calendar overlay provides a great means for identifying conflicts or getting a complete picture of your schedule.

Merging calendars is easy. Open the Calendar folder. Then, in the Navigation Pane, place a check beside the calendars you want to view. Outlook displays the calendars side by side. In the name tab at the top of one of the secondary calendars, click the View In Overlay Mode button to overlay the calendar with the primary one. Repeat for any additional calendars you want to overlay. To view the calendars separately, click the View In Side-by-Side Mode button in the calendar's name tab.

9 Scheduling Assistant

If you're using Outlook 2007 with Exchange Server 2007, the Scheduling Assistant can help you choose a meeting time that works best for all of the specified participants. Unlike the AutoPick Next feature, which just automatically selects the next time slot that fits everyone's schedules, the Scheduling Assistant analyses attendees' schedules and suggests several times for the meeting. The Scheduling Assistant identifies for each suggested time how many of the attendees and resources (such as meeting rooms) are free. You can click on a suggested time slot and then choose a meeting room from the drop-down list of available rooms Outlook offers.

10 Out-of-office scheduling

The Out Of Office Assistant, which enables you to generate out-of-office messages when using Outlook with Exchange Server, has also been improved in Outlook 2007. When used with Exchange Server 2003 or earlier, the out-of-office features are essentially the same in Outlook 2007 as in Outlook 2003. The only difference is the dialog box you use to specify the out-of-office message and rules. To set out-of-office options, regardless of which version of Exchange Server you are using, choose Tools | Out Of Office Assistant.

When used with Exchange Server 2007, you have additional out-of-office features. First, you can schedule your out-of-office period ahead of time. To do so, open the Out Of Office Assistant, choose Send Out Of Office Auto-Replies, select Only Send During This Time Range, and enter the beginning and end dates and times for the out-of-office period. When the start date and time arrives, Exchange begins sending out-of-office replies.

The other Exchange Server 2007-specific out-of-office feature is the capability to send out-of-office replies to people inside your organization that are different from the replies that go to people outside your organization. The Out Of Office Assistant dialog box offers two tabs, one for internal replies and one for external replies. Just click the appropriate tab and enter the out-of-office reply you want to use for that group.

By Jeff Conrad

The Microsoft Access development team added more features into Access 2007 than probably any other previous version. You'll definitely want to see what all the buzz is about around this latest incarnation of the popular desktop database application. Truth be told, I found it hard to pick out just 10 new features to highlight for this article.

#1: A redesigned user interface offers new tools

Virtually every aspect of the user interface in Access 2007 has been changed. If you've worked with previous versions of Access, you'll be relearning how to work within Access. This latest version includes a new Ribbon, Office menu, Quick Access toolbar, and Navigation Pane (**Figure A**). The latter is the replacement for the Database Window from previous versions. You need to plan for an initial decrease in your productivity as you familiarize yourself with all these new UI elements.

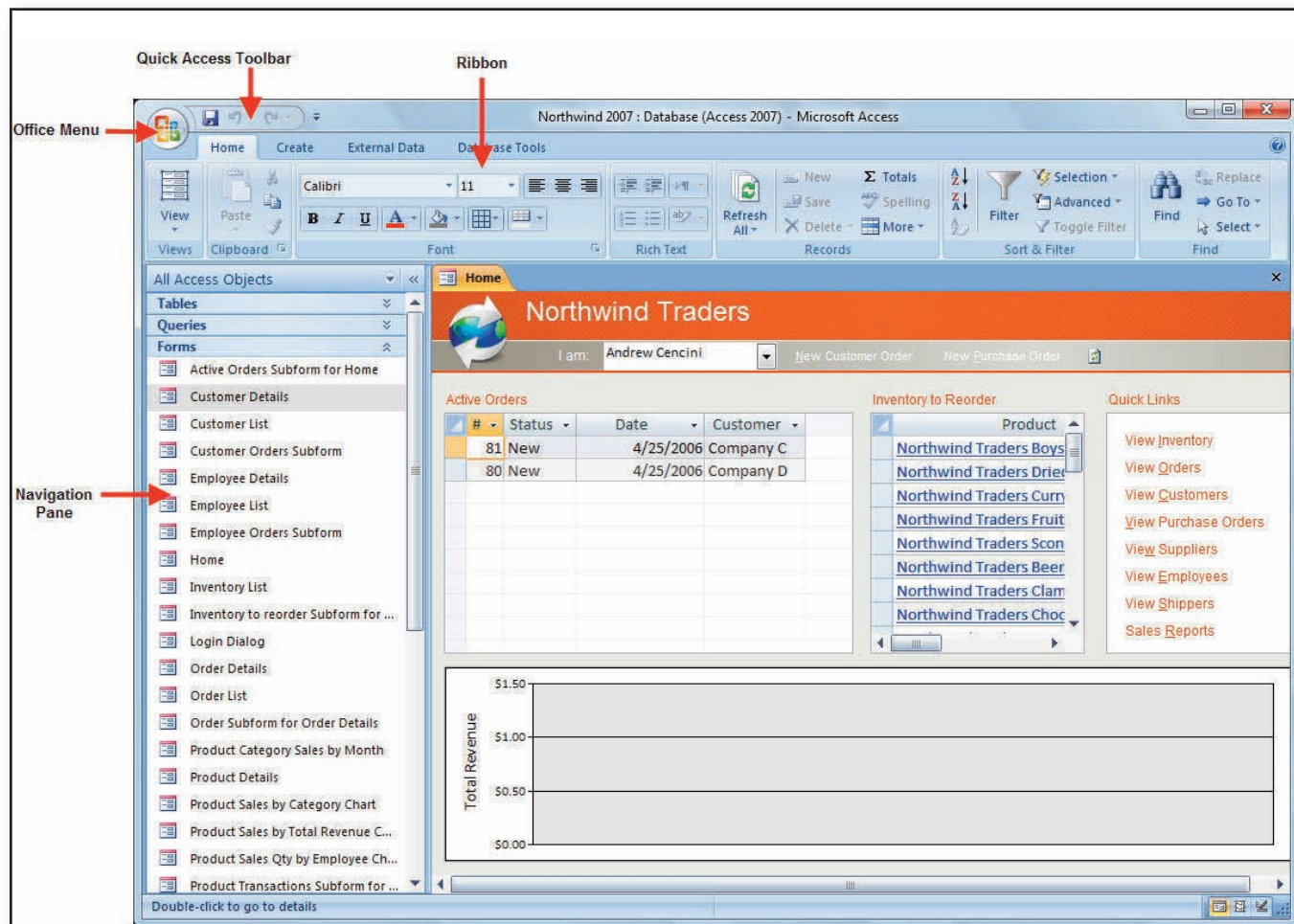


Figure A

#2: Layout view makes it easier to design your forms and reports

Access 2007 includes a new Layout view to help you design your forms and reports (**Figure B**). With this view, you can easily customize your forms and reports while viewing live data in the controls. You can also quickly move, resize, and align your form and report controls without having to switch to Design view. You can save valuable development time using the new Layout view to help position controls.

Figure B

#3: Report view lets you filter your reports

Access 2007 includes a new view for reports called Report view. You get a static snapshot of your data with the traditional Print Preview, but with the new Report view, you can dynamically filter the data and drill down to print only the information you need. Just right-click inside a control and select various filtering options from a contextual shortcut menu (**Figure C**).

#4: Date Picker simplifies entering dates

For a long time, developers have been asking for an improved method of inputting dates into Access. This latest version includes a built-in Date Picker control you can use for data types designated as Date/Time. Access displays a small button next to these fields in datasheets and forms. When you click this button, Access displays a small pop-up calendar control, making it very easy to select a date (**Figure D**). On forms, you can choose a property setting (Show Date Picker) to not display this Date Picker.

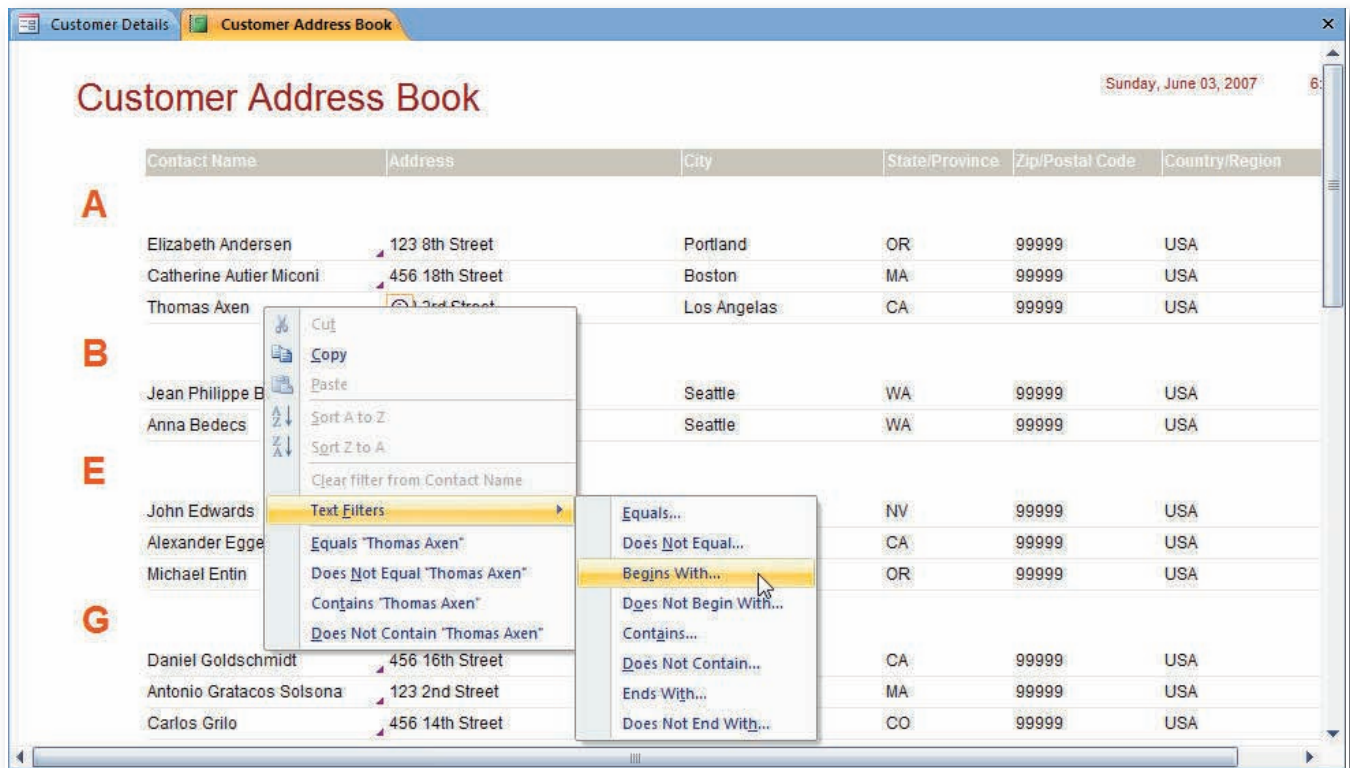


Figure C

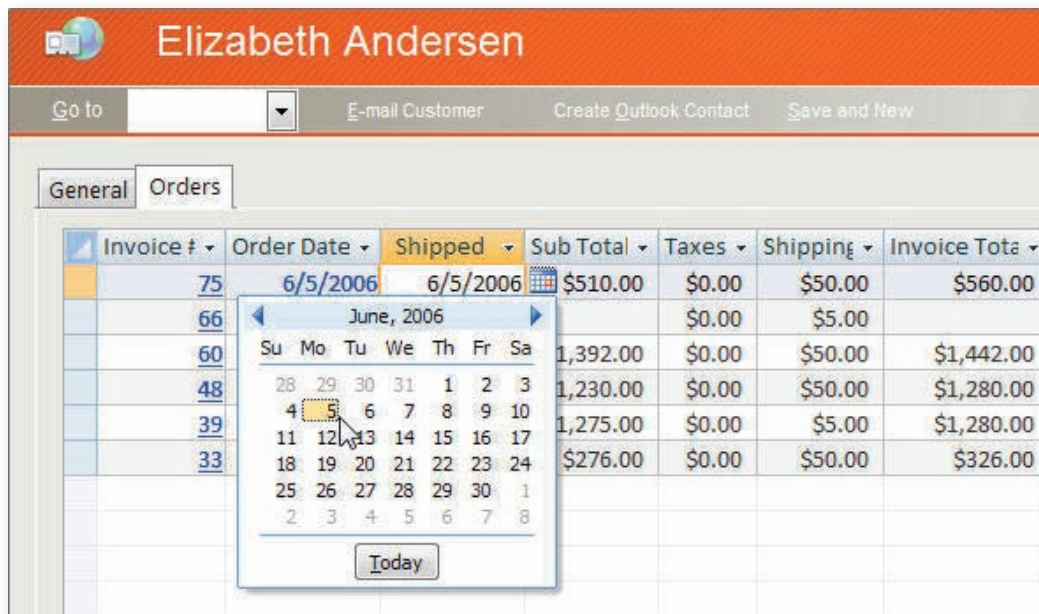


Figure D

#5: Enhanced Quick Create commands help you build tables, forms, and reports

Access 2007 includes enhanced Quick Create commands that help you build new forms and reports with the click of a button. These enhanced commands create new data entry forms and reports complete with controls and graphics. The commands will help you get a jump-start on adding new objects to your database. Look for these commands on the Create tab of the Ribbon (Figure E).

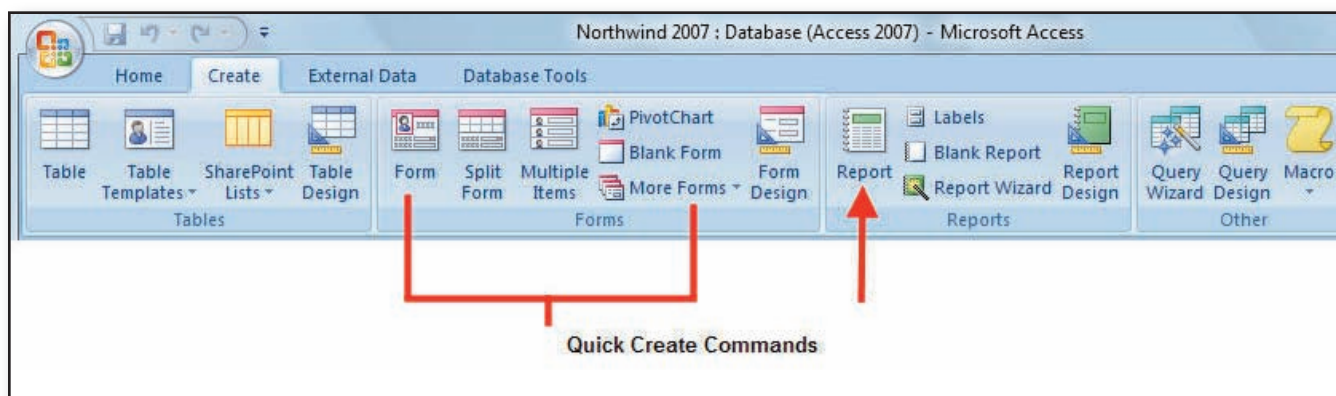


Figure E

#6: Alternating row color makes your data stand out

In previous versions of Access, you had to write code to alternate the background color of records on forms and reports. Access 2007 offers a built-in feature for this, which can even be used for datasheets. The new alternating row color effect, also referred to as the “greenbar” effect, makes it easier to read your data when you have a lot of repeating rows positioned close together. You can find the Alternating Row Color button in the Design group on the Ribbon (Figure F).

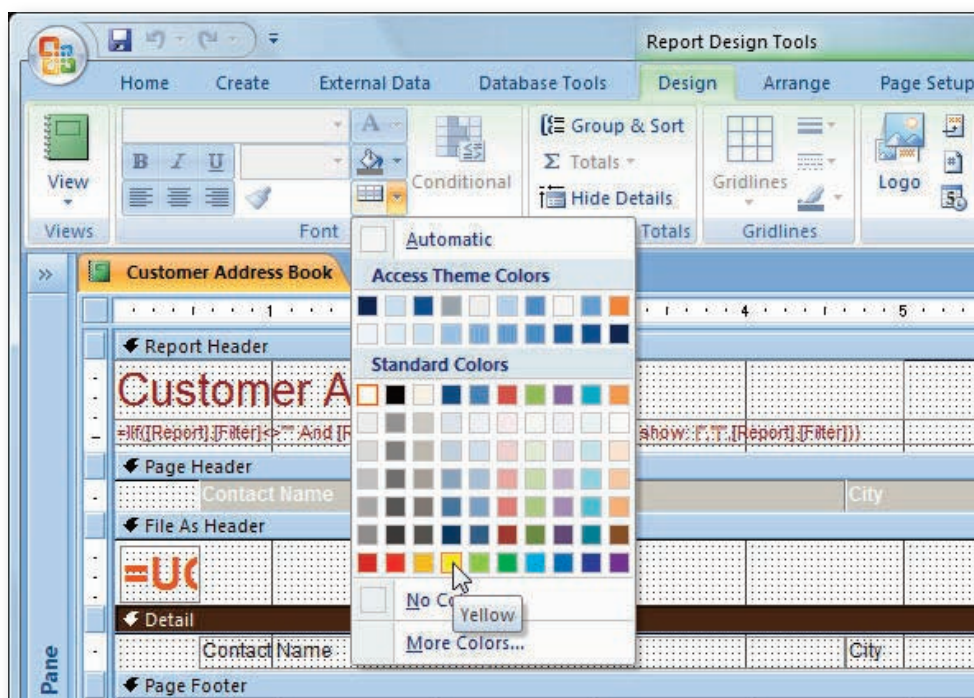


Figure F

#7: New Attachment data type reduces database bloat

A common question seen in Access newsgroups and support forums is how to add attachments to records without seeing significant database bloat. Access 2007 introduces a new data type called Attachment that allows you save one or more attachments (pictures, spreadsheets, documents, and so on) with a record (**Figure G**). With the added benefit of better compression in this version, you can easily add pictures to your records where appropriate. The Access development team added this new data type to align better with Microsoft Windows SharePoint Services.

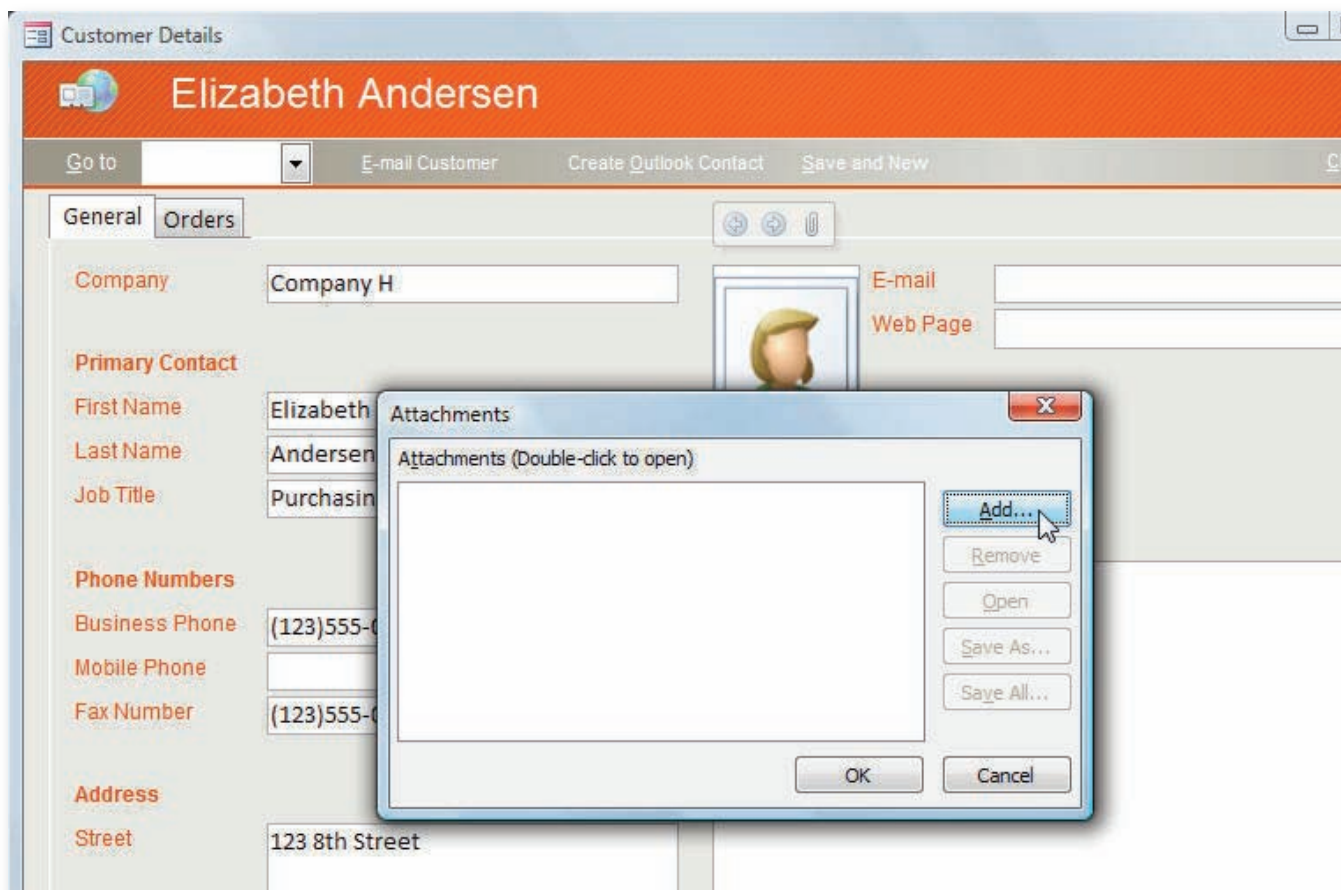


Figure G

#8: Multi-value field lookups ease the pain of creating many-to-many relationships

Lookup fields display one value in a field but store a different value. Access 2007 adds onto the existing concept of lookup data types by allowing you to create multi-value field lookups to handle complex data. With multi-value field lookups, you can store multiple values in a single lookup field. For example, in a field of Trained Positions, you could store all the trained job code positions for each employee. Whenever you use a multi-value field lookup, Access 2007 displays a special control that looks like a hybrid combo box-list box control (**Figure H**). When you click the down arrow on the control, you can individually select each of the related records. Hidden from the user interface, Access 2007 creates the appropriate many-to-many relationships, including the third junction table, to handle the complex relationship.

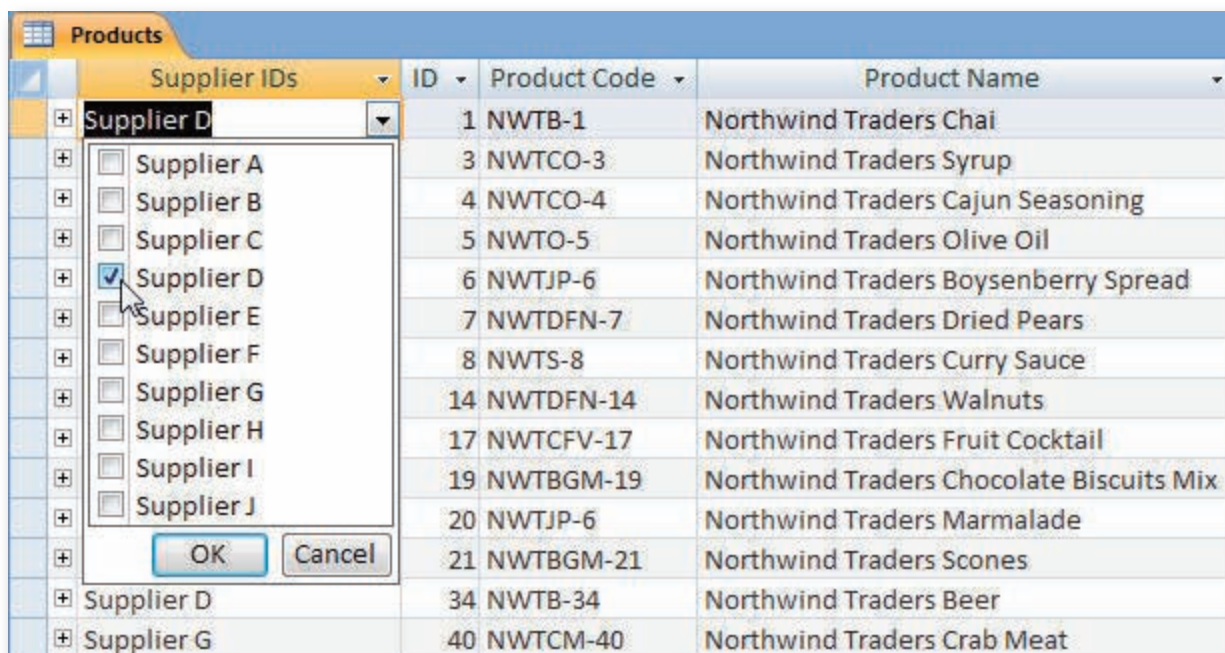


Figure H

#9: New feature lets you collect and import data via e-mail

An exciting new feature in Access 2007 is the ability to collect data through e-mail and import it into your database. You can use forms created with HTML or rich forms created with Microsoft Office InfoPath 2007. If you use HTML, your recipients need only have an e-mail client program that accepts HTML. If you use the InfoPath forms, you and your recipients must all be using Microsoft Office Outlook 2007 and InfoPath 2007. Why spend extra time updating membership records when your members can update their own records?! A wizard walks you through the steps necessary to create your data collection forms (**Figure I**).

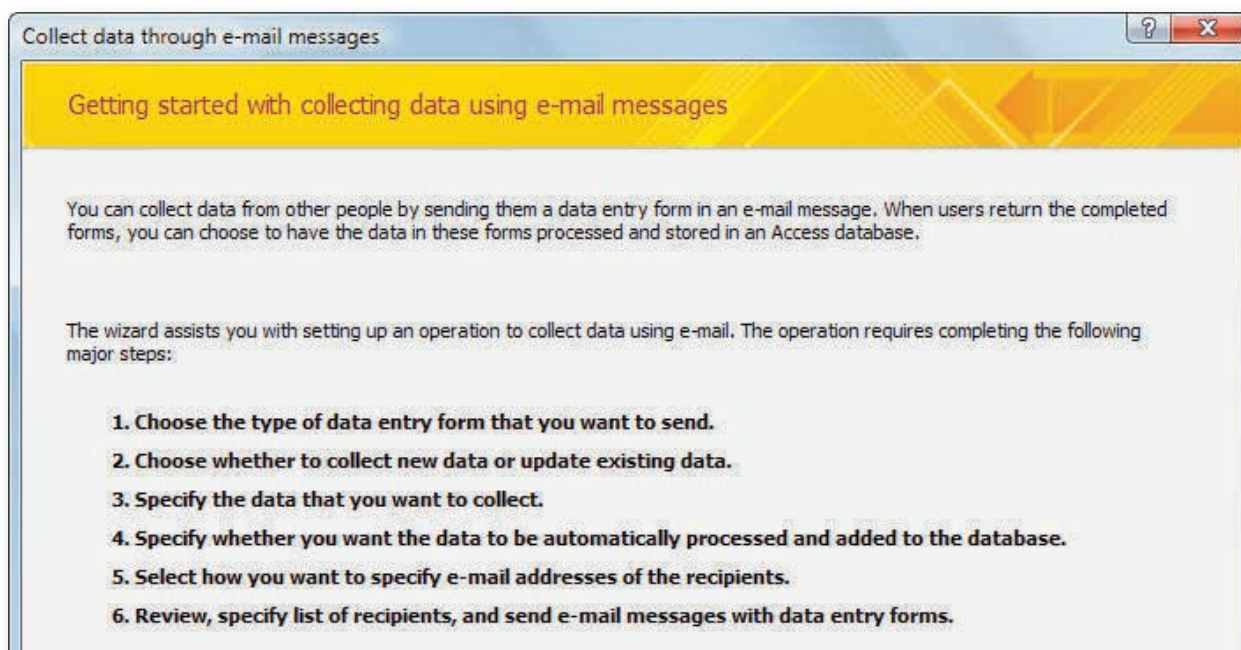


Figure I

10: Finally, rich text is built into Access

For all previous versions of Access, developers had to rely on third-party controls to have rich text capabilities — but no longer! Access 2007 includes the ability to have rich text in text and memo fields (**Figure J**). This formatting is stored as HTML. Go ahead and add in some fancy colors, bold face, italics, underlines, bullets, and more.

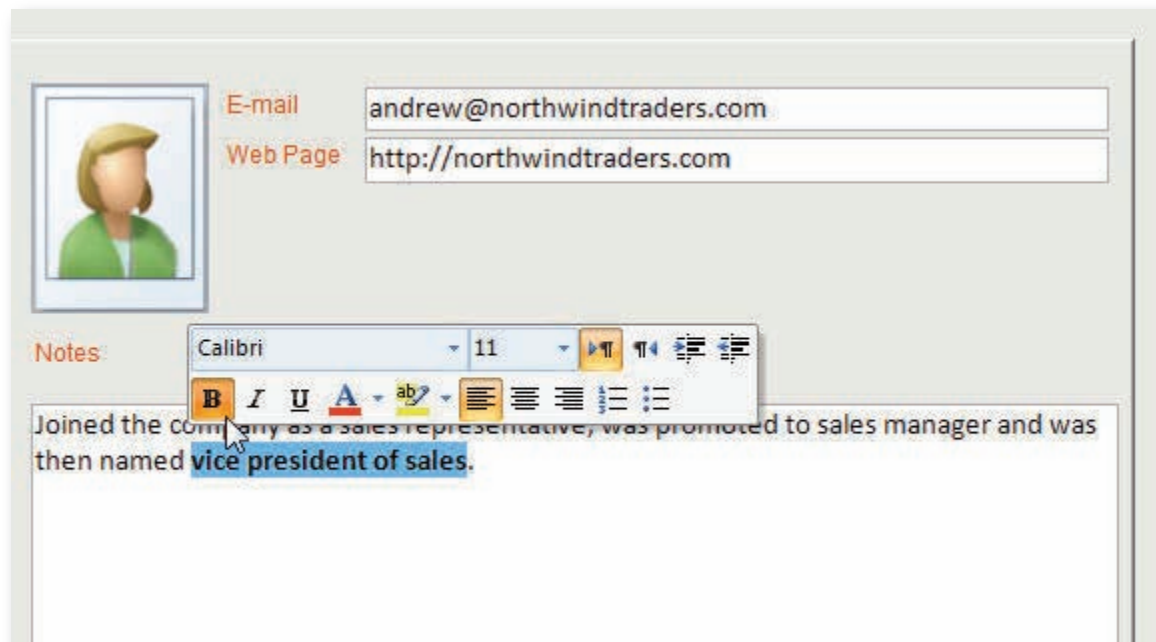


Figure J

Jeff Conrad was awarded Microsoft's Most Valuable Professional award from 2005 to 2007 for his continual involvement with the online Access community. He is co-author of *Microsoft Office Access 2007 Inside Out* and is a contributing author of *Microsoft Office 2007 Inside Out*. Because Jeff knows Access "Inside Out," he recently joined Microsoft as a Software Design Engineer in Test working with Access and Excel technologies. To learn more, visit his Web site at <http://www.AccessJunkie.com>.