FIRST
LOOK

Microsoft® OFFICE
2010

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Microsoft® Office

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Acknowledgments

Writing a book is a fun and typically fast-paced process that involves the talents of many individuals, and some projects involve more team members than others. *First Look Microsoft Office 2010* was a particularly exciting and challenging project because it involved working with Office 2010 in its various stages of development—which is like writing about a moving target—and coordinating ongoing feedback from the people on the front lines: Office 2010 product managers, reviewers, and content providers.

Thanks very much to everyone who has helped out along the way. Specifically a big Thanks to Lynn Finnel, a great project manager and friend; Rosemary Caperton, an excellent project editor with a green heart; Juliana Aldous, who provided help with hurdles and roadblocks; Joanna Yuan and her crew (Stephanie Krieger and Beth Melton) who gave feedback and program assistance; and Steve Sagman of Waypoint Press and editor Roger LeBlanc for the great copy editing and fine layout of the book you are now viewing. And thanks, always, to my agent, Claudette Moore, for doing everything she does so naturally and well in making these projects possible.

Introduction

In this chapter:

- The Road to Office 2010
- Who Uses Office 2010?
- What's in Office 2010?
- Office 2010 System Requirements
- What You'll Find in *First Look: Microsoft Office 2010*

You've probably noticed that part of living and working in the world today requires that you do many things at once. For many of us, managing multiple tasks is our normal work mode. You prepare a new presentation for a client while you're working collaboratively with your team, corresponding with people through e-mail, and inserting Microsoft Office Excel data—which might be changing moment to moment—into the slides you create.

And if you're like many people, you're multitasking when out of the office, too. You check e-mail while you wait in line for your morning coffee, or you make a quick edit to finalize a report when you're waiting for your luggage at the airport, Or perhaps you set up a group meeting with teammates on three continents and trade documents just moments before it starts so that you're all looking at the same plan.

Welcome to Office 2010. Whether you work primarily in the office or on the go, you'll find smart tools in this release that enable you to get your work done easier, faster, and more professionally than ever. All the freedom to multitask built into Office 2010 has an upside you might not expect: being able to work anywhere, anytime means more flexibility, which translates to higher efficiency and effectiveness. And when your work is done quickly and well, you have more time left over for the people, places, and possibilities that intrigue you.

The Road to Office 2010

Did you know that Microsoft Office celebrated its twenty-fifth birthday in 2009? Throughout the last two and a half decades, Office has grown and improved dramatically—partially thanks to developments in technology, but primarily thanks to you.

It's no secret that Microsoft places great importance on customer feedback. Users all over the world continually provide comments and suggestions through various channels. Microsoft gathers information through extensive beta programs, market research, the help systems, and discussion forums. Focus groups galore provide veritable mountains of data for researchers, program developers, and communications people to sift through. All this feedback

comes together to provide current, relevant pictures that show which features you want and need most in the programs you use every day. No matter where you fit on the scale ranging from new user to power user, the new features in Office 2010 give you the option of becoming more productive, more collaborative, and more mobile as you work.

We live in interesting times. There's a major shift occurring in the way technology weaves through all aspects of our lives. Limitations that seemed all but insurmountable a few years ago—such as having your team divided among three different continents or needing to access your data immediately when you're away from your desk—are now gone for good.

Office 2010 makes it possible to work virtually anywhere—on the desktop, on the train, in the carpool line, in the coffee shop—with almost anyone, on any continent. And no longer are you tied to your desktop PC—now you can work on the go using Web-based and mobile versions of your favorite Office applications.

The tools you use in Office 2010 on a daily basis are no longer just designed for creating documents or spreadsheets—although the programs do help you accomplish those common tasks, and with style. The Office 2010 applications also deliver features you've been asking for—professional formats that are a breeze to apply, easy exchange of data among applications, and streamlined techniques that enable you to get more out of the time you invest in the documents and presentations you create.

Worldwide, Office users demonstrate that they want reliable, easy-to-use applications that enable them to produce professional results, work collaboratively in both local and global teams, and work anywhere from flexible locations limited only by Web access or phone reach. These three ideas—express yourself, collaborate, and work anywhere—are the key visions behind the changes in Office 2010.

Fast, professional, collaborative, flexible. You're going to love this new release!

Who Uses Office 2010?

One fascinating result that emerges from Microsoft research is the picture of Office 2010 users. Think of one of those amazing mosaic portraits, which—when you look closely—you see is actually made up of thousands of tiny, individual photos. Office 2010 users represent an amazing, diverse, multitalented global group that uses Office to accomplish just about every possible productivity task you can imagine. Their needs and interests vary greatly, and their use of the different Office applications runs the gamut from the very simple to the incredibly complex.

Note The dramatic redesign of the Office interface, introduced in Office 2007, was due in part to a desire to help Office users discover a wider range of tools in their favorite programs. Customer research had shown that most users worked with specific tools in the applications they were familiar with, but a larger percentage of users weren't getting the full benefit from the programs they might have if they had been aware of the wider range of features and possibilities. Data is showing that the redesign of Office really did reach this goal—Word 2007 and Excel 2007 users are now using four times as many features as they used in previous versions, and for PowerPoint, the increase in feature use is a factor of five.

Today's Office 2010 users often move back and forth among applications, depending on the tasks they're engaged in at any given time. Here are some typical scenarios:

- Meredith is a customer service representative in a large company. Her job includes fast-paced communications: she receives and sends e-mail messages to dozens of customers, prepares and sends proposals, updates Web information, and tracks campaign results in the customer services database. Occasionally, Meredith gets to lead brainstorming sessions for new campaigns (she loves that) and compiles the notes for the team. Printouts of colorful SmartArt diagrams she created in Word and PowerPoint—as well as her favorite "The Far Side" cartoon—are hanging on her cubicle walls. Her daily tasks require a whole palette of applications: Outlook, Word, PowerPoint, Publisher, OneNote, and occasionally, Access.

- Ian is a mid-level manager in the communications department of the same company. As team leader, he is in charge of planning, budgeting, and managing all reports and support materials that are developed to support the company's product line. He uses Outlook for scheduling and task management, and works with Word, Access, and Excel for reviewing and working with important data. Ian's team also prepares company reports and public relations materials using Word and Publisher.

- Dominik is marketing coordinator—she is responsible for messaging campaigns, running budgets, hiring contractors, working with the board, maintaining a database, conducting webinars, providing online training, and more. She uses Word, Excel, PowerPoint, Outlook, Publisher, and Access, and she needs to be available for decisions and updates continually. Because she manages a department of five, she uses Microsoft SharePoint 2010 to keep the team organized and working efficiently.

- Kamil is an Office power user who has a long commute to and from his Washington office each day. He has reduced the impact of his travel time by telecommuting two days a week, but he also wants to be able to get a start on work—or wrap things up for the day—when he's on the train. Whether he's working from home or he's in the office, he uses Outlook, Excel, Word, and SharePoint to run his department, keep the team on track, host meetings, review and sign off on documents, and make the calls that impact the bottom line in his department.

- Todd is the IT manager for the business. He is in charge of upgrading, deploying, and training staff on Office 2010. He also secures and backs up all files, writes custom utilities for the Web portal, and works in customer and staff support. He is a programmer and power user of all Office applications, but he has a small staff, so he needs to be able to offer training and support in a cost-effective and productive way.

Office 2010 includes a range of features that will support the daily activities of each of these users. The consistent look and feel of the Ribbon helps ensure that users are comfortable and confident working with any of the Office applications. Changes in each of the applications make it easier to produce and share professional results in a variety of ways. And not only do the Office applications work together smoothly as an integrated system, they provide easy collaboration, anywhere access, and all the productivity tools users need as their work tasks change and grow.

What's in Microsoft Office 2010?

Similar to earlier releases, Microsoft Office 2010 is available in several versions, each designed with a specific group of users in mind, and each accessible via PC, browser, or phone. Here's what you'll find in each version of Microsoft Office 2010:

- **Office Professional Plus 2010**   is for the high-end user who collaborates with others, manages data, and needs flexibility, mobility, and coauthoring capabilities. This edition includes Word 2010, Excel 2010, PowerPoint 2010, OneNote 2010, Outlook 2010, Publisher 2010, Access 2010, SharePoint Workspace 2010, InfoPath 2010, and Communicator 2010.

- **Office Professional 2010**   is designed for the business user who needs all the power of the traditional applications as well as access to data management tools. This version includes Word 2010, Excel 2010, PowerPoint 2010, OneNote 2010, Outlook 2010, Publisher 2010, and Access 2010.

- **Office Standard 2010**   removes Access 2010 from the mix. It offers users who work with documents, worksheets, marketing materials, presentations, notebooks, and—of course—e-mail and schedules just what they need: Word 2010, Excel 2010, PowerPoint 2010, OneNote 2010, Outlook 2010, and Publisher 2010.

- **Office Home and Business 2010**   streamlines the suite to the basic applications used by small business and home users: Word 2010, Excel 2010, PowerPoint 2010, OneNote 2010, and Outlook 2010.

- **Office Home and Student 2010**   is geared toward student and home users, offering the traditional applications for creating documents, worksheets, presentations, and workbooks: Word 2010, Excel 2010, PowerPoint 2010, and OneNote 2010.

- **Office Professional Academic 2010**   is designed for faculty members who need access to all the core applications—Word 2010, Excel 2010, Outlook 2010, PowerPoint 2010—as well as OneNote 2010, Access 2010, and Publisher 2010.

- **Office Starter 2010**   is for the beginning user who wants to work with only Word 2010 and Excel 2010.

Office 2010 System Requirements

In keeping with green efforts to maximize efficiency on systems users already have, Office 2010 was designed for any system capable of running Office 2007. Here are the suggested system requirements for Office 2010:

- Computer and processor: 500-MHz processor or higher.

- Memory: 256 MB (megabytes) of RAM or more.

- Hard disk space: 2 GB (gigabytes)*.

- Drive: CD-ROM or DVD drive.

- Display: 1024 by 768 or higher resolution monitor.

- Operating system: Windows XP SP3 (32-bit), Windows Vista SP1 (32-bit or 64-bit), Windows 7 (32-bit or 64-bit), Windows Server 2003 R2 with SP2 (32-bit or 64-bit), or Windows Server 2008 with SP1 (32-bit or 64-bit). Terminal Server and Windows on Windows (WOW) are also supported. **

    * Part of the used hard disk space can be released after installation is complete.

    ** WOW allows users to install 32-bit Office 2010 on 64-bit systems.

What You'll Find in *First Look: Microsoft Office 2010*

I hope *First Look: Microsoft Office 2010* inspires you and gives you a good sense of the exciting features coming in the release of Office 2010. This book was written while the software was in development, so you may find some variance in screen illustrations and procedures, but the overall story is the same: The key to the new features is freedom and flexibility—you'll be able to see how to get more from your applications no matter how—or where—you choose to use them. Office 2010 is designed to help you express your ideas

clearly and creatively, work seamlessly with a group to get things done efficiently and on time, and access and work with your files virtually anywhere with a similar look and feel whether you're using your PC, browser, or phone. To showcase these key points, *First Look: Microsoft Office 2010* follows this organization:

- Part I, "Envision the Possibilities," introduces you to the changes in Office 2010 and shows you how you can make the most of the new features to fit the way you work today. Chapter 1, "Welcome to Office 2010," gives you a play-by-play introduction to new features; Chapter 2, "Express Yourself Effectively and Efficiently," details the great feature enhancements and visual effects throughout the applications; and Chapter 3, "Work Anywhere with Office 2010," explores the flexibility factor by presenting a set of scenarios that enable users to complete their work no matter where their path takes them.

- Part II, "Hit the Ground Running," focuses on each of the Office 2010 applications in turn, spotlighting the key new features and showing how they relate to the whole. These chapters provide a how-to guide for many of the top features you're likely to use right off the bat, and they offer inspiring ideas on how to get the most from your favorite applications.

- Part III, "Next Steps with Office 2010," zooms up to the big picture and provides examples to help you think through interoperability. How often do you use the various Office applications together? Customer research shows that people often don't realize how well the applications work together as a complete system—which means they might be laboring over items they could easily incorporate from somewhere else. This part of the book provides examples for integrating the applications and explores Office 2010 security and training opportunities, as well.

So if you're ready, let's take a closer look at the ways Office 2010 can help you express your ideas, whether you work on your own or as a part of a team, and share your work with the world.

Part I
Envision the Possibilities

Office 2010 ushers in a new era in productivity software by making the reliable tools you've come to expect from Microsoft easier to use and more powerful than ever. In this part of the book, you'll get the big picture view of how Office 2010 improves the way you work every day.

This part of *First Look: Microsoft Office 2010* includes the following chapters:

- Chapter 1: Welcome to Office 2010
- Chapter 2: Express Yourself Effectively and Efficiently
- Chapter 3: Collaborate in the Office and Around the World

Chapter 1
Welcome to Office 2010

In this chapter:

- Features that Fit Your Work Style
- Changes in Office 2010
- Exploring the Ribbon
- New Backstage View
- Languages and Accessibility
- Coming Next

This is an exciting time to be working with technology. Changes are occurring with what feels like ever-increasing speed. The world is growing continually smaller, and far-away places are more and more within our reach. Today our coworkers are almost as likely to be working on a different continent as they are to be down the hall. Opportunities are possible now that we couldn't envision a few years back—more of us are telecommuting, training by webinar, and planning projects virtually, all of which is accomplished through Web and phone access to the tools that make it all possible.

Office 2010 was designed with evolving workplace trends in mind. With Office 2010, you can use familiar, reliable Office applications to work more efficiently, produce better-than-ever results, collaborate in real time with peers in your office or around the world, and continue your work from any point on the globe with Web or phone access. And even though these are big changes, they fit easily into what you're already doing. The tools you need to implement these changes in your work efforts don't have a steep learning curve. By adding to the functionality of your favorite features (Print, Paste, and Picture Effects, to name a few examples), Office 2010 helps you get more done with less effort. And the collaboration and anywhere access features make working with anyone, anytime, a natural and intuitive process.

Features that Fit Your Work Style

For many of us, our long workdays of focusing on single projects have evolved into days with smaller blocks of time dedicated to one of many things we have going on. We are getting more done than ever—and Office 2010 can help you better enjoy the process.

What's exciting about Office 2010 is that it's more than a set of powerful tools that help you meet and manage the demands of your fast-paced workday. For example, if you do most of your work at your desk, crunching numbers, answering e-mail, and preparing reports, Office 2010 helps you work faster, manage huge worksheets, design effective documents easily, and present your work in new, visual, and flexible ways that help your diverse audience understand your ideas.

If you work primarily in a team, you'll find that Office 2010 makes collaboration easy with features that enable you to share files, co-author documents, and even contact teammates in real time.

If you work predominantly on the road—and frequently need to get updates on projects, add items to the calendar, or approve new documents and strategies—Office 2010 gives you the flexibility to use the Office applications you know and love regardless of whether you're logging in from your PC, your browser, or your phone.

In Part II, "Hit the Ground Running," you get a closer look at the new features in each of your favorite Office 2010 applications.

Office 2010 at a Glance

With Office 2010, you can

- Increase your productivity with more effective, reliable tools
- Express your ideas creatively and effectively, for multiple audiences
- Produce and share professional results easier and faster
- Communicate—and manage communications—easily whether you work independently, collaboratively, or remotely
- Gain more freedom and flexibility to work anywhere, with anyone
- Enjoy the consistent and high-quality Office experience from your PC, browser, or phone

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Changes in Office 2010

This section presents a look at the key ideas behind the development of the features you will find in Office 2010. Working independently or in a group, at your PC or on the road, you'll find new tools and techniques that help you create great-looking documents, worksheets, presentations, and more, and enable you to share your work easily with others.

> **Tip** One significant change that has a large impact on processing speed and power is that Office 2010 is now available in a 64-bit version. This expanded capacity really shines in Excel, where enormous spreadsheets require that kind of processing power.

Let Your Ideas Soar

Office 2010 shows that powerful programs don't have to be difficult to use. Program designers know that users today need a great variety of powerful, flexible tools, and that it's important that those tools and features be easy to find and use. For this reason, you'll find quick access to style galleries, themes, and more that help you select professional designs, choose from color schemes that work, and create a professional look whether you're creating documents, worksheets, presentations, notebooks, or database tables.

To help you take your ideas to the next level, Office 2010 offers artistic effects and picture editing, video editing in PowerPoint, new data visualizations (including sparklines and slicers) in Excel, and the ability to manipulate fonts professionally in Word. And this is just the beginning—there's much more, as you'll see in the chapters in Part II, "Hit the Ground Running."

And not only will your output be better, but the whole document creation process is easier, thanks to enhanced search features, simplified navigation, the contextual spell checker, translation tools, and more.

Collaborate Easily and Naturally

Unless you've been living off the grid for the last couple of years, you've probably noticed that the world has gotten substantially smaller, thanks to the continuing expansion of Web technologies. Blogs, social media, and new online publishing alternatives have steeped most of us in a culture that is always on, always connected, and always talking.

An increasing number of people are now working in teams, and those teams might be spread throughout the office or located around the world. A writer in Omaha could be working with a software developer in India who might have been hired by an administrator in Scotland. This geographical diversity within a project team is no longer an unusual occurrence—an increasing number of Office 2010 users need to collaborate with peers and clients all over the globe.

Office 2010 includes powerful tools to facilitate easy and successful team collaboration and management. Co-authoring features in Word 2010, Excel 2010, PowerPoint 2010, and OneNote 2010 enable you to work with a variety of teammates on a single project in real time. And, when you use these features, your changes are automatically tracked and coordinated.

Microsoft SharePoint Workspace 2010, included with Microsoft Office Professional Plus, enables users to move files online and offline easily. Team leaders and members use SharePoint Workspace to create and update the team calendar, conduct project management, assign tasks, create document libraries, and more. Team members can collaborate in real time, and their documents show who is working on what so that duplication of effort or trading outdated versions of files is no longer a problem when several users work on the same document.

Presence information is available with Office Communicator throughout Office 2010, enabling you to see which of your teammates are online and communicate instantly—via instant messaging, e-mail, or phone—to clarify questions on the project. You don't have to leave the application you are working in to ask questions you need answered right away.

Work Anywhere—and Everywhere

Laptop, notebook, desktop, kiosk—any place that gives you an on-ramp to the Internet is a potential workplace in Office 2010. Office 2010 Web Apps let you work with the familiar Office 2010 interface and work with your Word 2010, Excel 2010, PowerPoint 2010, and OneNote 2010 files. You can share files with other users by using Windows Live or SharePoint Workspace 2010 and then open and work with the files on your PC when you get back to the office.

If you are a gadget lover, you might already have a smartphone with all the bells and whistles you can get. Office Mobile 2010 gives you another way to work on the go, using your Windows Mobile smartphone. You can write up an idea before breakfast, create a new document, and share it with the team—all before you get into work in the morning. Later, on the way to meet a vendor, you can add a few more details, insert a picture, and send the file for review—all from your phone.

Office Mobile works with Word, Excel, Outlook, PowerPoint, and SharePoint Workspace. The application windows have been customized to fit the small phone screen and browser so that you can find what you need easily and enjoy the familiarity of the Office 2010 interface.

This flexibility in Office 2010 gives you the freedom to follow through on your creative ideas in real time—whenever and wherever they occur.

Exploring the Ribbon

At the top of the interface in all Office 2010 applications, the Ribbon brings you all the tools you need—and only the tools you need—to complete specific tasks in the various Office 2010 applications. The Ribbon includes tabs that reflect the various tasks you perform within each of the applications, and each tab contains tool groups offering the tools you need as you work with the files you create, Every application has the same look and feel, which enables you to learn the Ribbon once in your favorite or most often used Office program and then easily find your way around any other Office program. The Ribbon was introduced in Office 2007 and has been improved in Office 2010 to include some new tools and provide more flexibility. You can use the Minimize The Ribbon button to hide the Ribbon so that you have more room to work on-screen, and you can customize the Ribbon to create your own tabs and tool groups specific to your needs.

The simple design of the Ribbon enables you to find the tools you need in the tab that reflects the task you want to perform. When you want to add a picture to your annual report, for example, you look in the Insert tab and find Picture in the Illustrations group. Figure 1-1 introduces you to the Ribbon in Word 2010 and Excel 2010.
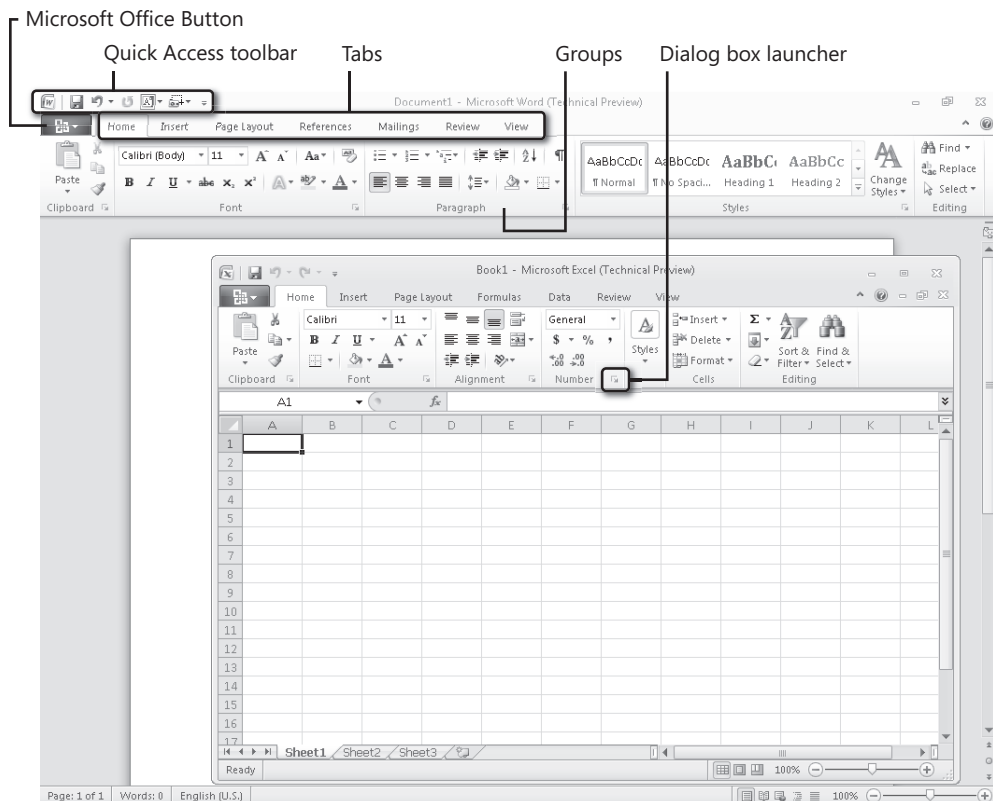
FIGURE 1-1 Exploring the Office 2010 Ribbon.

A Quick Look at the Ribbon

The Ribbon simplifies the way you find and work with tools and options in Office. With a simple, easy-to-understand layout for your commands, the Ribbon helps you find the tools you need:

- **Ribbon Tabs**   Each *tab* provides a set of tools related to an overall task you are likely to be performing in a specific application. In Figure 1-1, the Word 2010 tabs are File, Home, Insert, Page Layout, References, Mailings, Review, and View; the Excel tabs are File, Insert, Page Layout, Formulas, Data, Review, and View. The File tab takes you to Microsoft Office Backstage view, which gives you a central place to work with the files you create in Office 2010 applications.

- **Ribbon Groups**   Within each tab are *groups* that help organize common commands to help you quickly find what you need for a specific task. For example, on the Insert tab in Word 2010, you'll find Picture, Clip Art, Shapes, SmartArt, Chart, and Screenshot in the Illustrations group.

- **Galleries**   A down-arrow appears to the right of some options in groups. Clicking the down-arrow display a gallery of options you can select or a list of additional choices. (See Figure 1-2.)
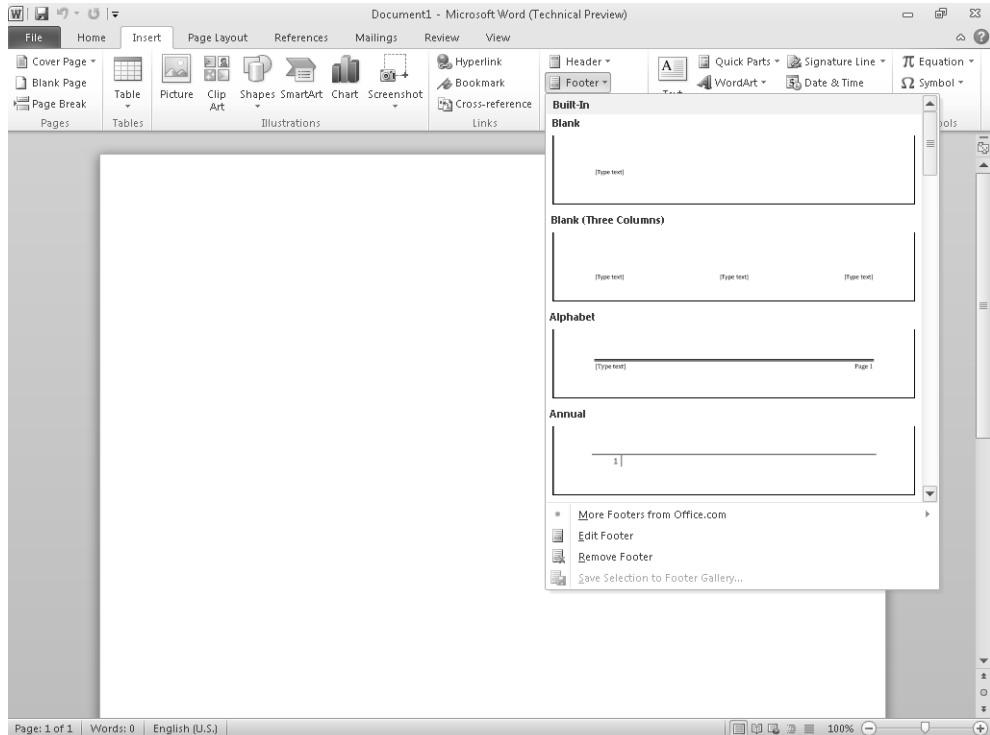
FIGURE 1-2 Galleries display visual examples of options.

Contextual Tabs

In addition to the tabs, groups, and tools shown in the Ribbon during normal use, contextual tabs appear when you perform specific actions in a file. The fact that they appear only when you need them is part of the beauty of the Office 2010 interface—this keeps the number of commands on-screen at any one time at a minimum and easy to navigate through. For example, when you click a photo in a Word document, the Picture Tools contextual tab appears, providing options related to picture editing. (See Figure 1-3.)
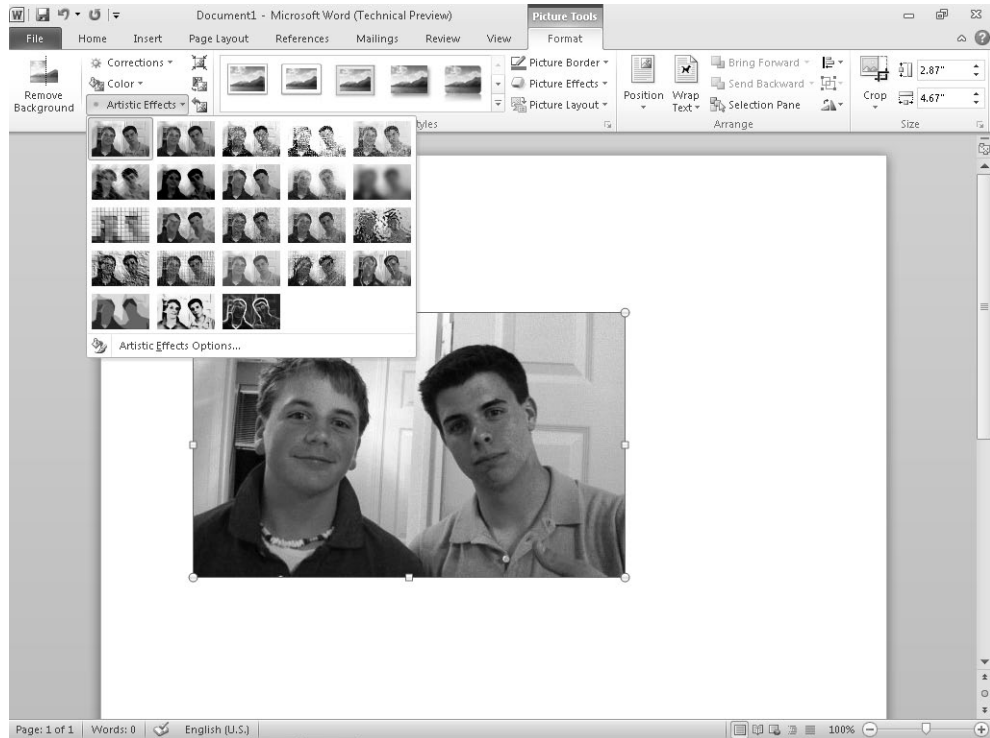
FIGURE 1-3 The contextual tab provides options related to the task you are performing.

New Backstage View

One of the major improvements in Office 2010 is Microsoft Office Backstage view, a kind of one-stop shop for all tasks related to managing the files you create in Office 2010 applications. The round and colorful Microsoft Office Button in Office 2007 has been replaced by the File tab. When you click it, you are taken to a screen outside the document where you can manage file information and save, share, print, protect, and work with version information for the document. (See Figure 1-4.)
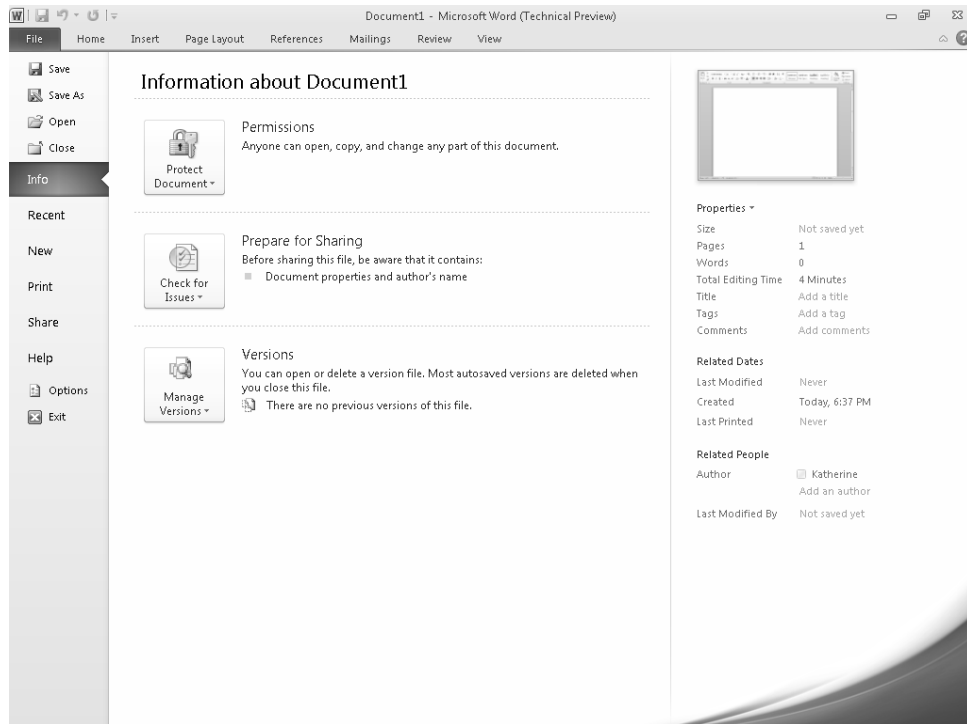
FIGURE 1-4 Backstage view helps you prepare, manage, and share the files you create.

Backstage view is organized in three panels. The left panel includes the commands you'll use to work with the files you create. The center panel offers related options, and the third panel displays a preview image of the selection or additional options. For example, when you click Print, the center panel shows print options, and the right panel displays a preview of your document as it will appear in print. This streamlines the print process so that you can preview and print your document in one step.

Managing Files in Backstage View

In Backstage view, you'll find the commands you traditionally found on the File menu: New, Open, Recent, Close, Save, Save As, Print, and Exit. In addition to each of these basic file-management commands, you'll find Share, which enables you to share the file in a variety of ways. You can share your desktop directly from Backstage view by using Communicator integration, sending the file by e-mail or fax, or saving it to a SharePoint Workspace or to a blog.

> **Tip** Another great option Backstage view offers is that you can customize it to include your own workflows and procedures.

Backstage view is designed to give you access to important tools users sometimes forget to use. For example, you can run the Document Inspector by clicking Check For Issues in the Info panel of the Backstage view and clicking Inspect Document.

Streamlined Printing

Another great time-saving feature in Backstage view is the new Print process. Microsoft re-search shows that more than 60 percent of Office users print more than 60 times per month. That's a lot of time clicking Print options! Now in Office 2010, Print Preview has been com-bined with Print so that instead of working through multiple dialog boxes, you get a one-page view of how the file will look in print. (See Figure 1-5.) You can choose your options right on the screen and click Print—and you're done.
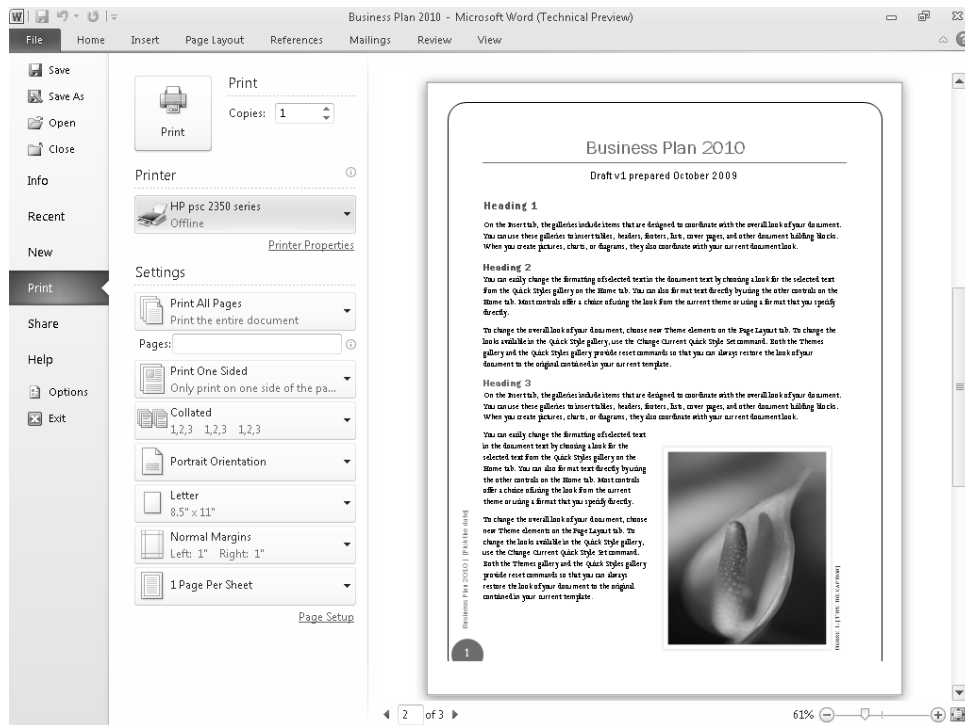
FIGURE 1-5 Now you can preview and print in one smooth process.

Languages and Accessibility

In keeping up with the reach of the global workforce, Microsoft Office 2010 has more robust language tools than ever, including a choice of translation tools. According to Microsoft re-search data, more than 1.6 million words have been translated using the Microsoft Language tools—plus more than 6.2 million words online—into more than 100 languages. Office

Online, which provides all kinds of content for Office users—including tips and tricks, how-to articles, and video tutorials—provides content in more than 90 languages.

You'll find the Translate tool, which enables you to translate words or phrases, in the Review tab of Word 2010, Excel 2010, PowerPoint 2010, and OneNote 2010. Or you can use the Mini-Translator tool for on-the-spot translations. (See Figure 1-6.) The Editing Language feature enables you to choose the language used by the dictionary for the proofing tools you select.
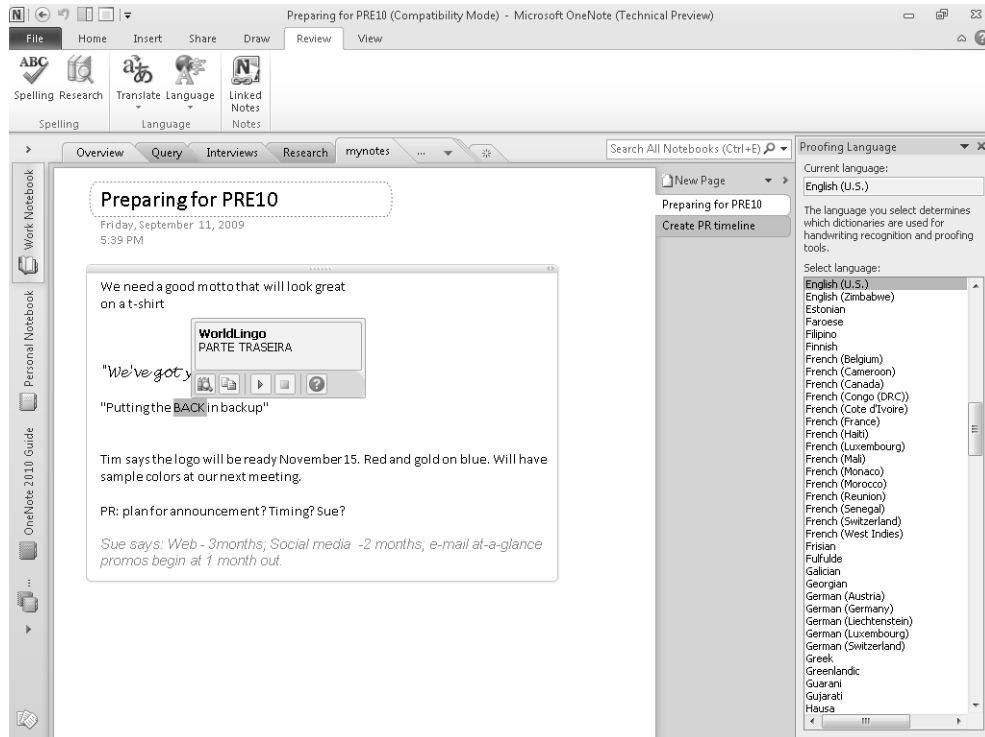
FIGURE 1-6 Translate words or phrases on the fly, and choose the language dictionary you want to use.

In terms of extending the reach of applications for users who are differently abled, Microsoft works with more than 175 partners to create assistive software that enables Office to provide screen readers, high-visibility color schemes, and special keyboards.

Coming Next

This chapter painted the big picture of Office 2010 changes, introducing you to the overall design goals in this release. It also summarized changes to the Ribbon, introduced you to Backstage view, and discussed enhancements to print and language functions. The next chapter takes a closer look at the Office 2010 features that will help you express your ideas in a lively and effective way—through words, images, numbers, and more.

Chapter 2
Express Yourself Effectively and Efficiently

In this chapter:

- Understanding Your Audience
- How Visuals Help
- Adding Text Effects
- Adding Artistry to Your Images
- Working Font Magic in Word 2010 and Publisher 2010
- Creating Data Visualizations in Excel 2010
- Editing Video in PowerPoint 2010
- Communicating Visually in Access 2010
- Enhancing and Streamlining Communications in Outlook 2010
- Coming Next

People use Microsoft Office to do many, many things. Depending on the nature of your work, you might create documents, design worksheets, prepare reports, develop and manage databases, create and give presentations, e-mail clients and coworkers, gather information, analyze information, and share information. And that's just Monday!

Chances are that many tasks you do in Office 2010 involve communicating ideas to others. Those others might be peers, clients, board members, prospective customers, students, and more. You need to be able to create, prepare, and share worksheets, charts, reports, databases, Web pages, e-mail messages, and brochures that other people can view and understand. And of course, once they understand what you're sharing, you want them to give you the response you're hoping for—whether that's a new contract, an important sale, startup funding, or accolades for a job well done.

Office 2010 includes a variety of new features and tools that can help you communicate your ideas clearly, visually, and in ways your readers will understand. Framing both what you want to *show* and *tell* is important and can help you make sure your points hit their mark. This chapter gives you a tour through the various new features that will help you showcase your

thoughts more creatively than ever, bringing more visual energy to the items you produce. Specifically, this chapter introduces you to features that help you do the following:

- Improve the formatting of your Word 2010 text by adding special artistic effects such as shadows, reflections, glows, and more.

- Take advantage of the professional typography capabilities available in many OpenType fonts, such as ligatures and stylistic sets. Edit pictures within your document, worksheet, brochure, or presentation by using the image-editing features in the various Office 2010 applications.

- Edit videos within PowerPoint 2010, customizing the length, formatting, and effects to meet your needs.

- Create data visualizations that help your customers grasp the trends in your Excel 2010 data.

Understanding Your Audience

Beginning with the end in mind is a good approach for just about any document, worksheet, presentation, notebook, and database you create in Office 2010. When you first begin a new file, consider your answer to the following questions:

- Who will be reading or using this file?

- What will they expect to see?

- Do you have photos that support the points you're making in the document or worksheet?

- Will you use special text effects to call attention to key points, headlines, or labels in Word 2010?

- Will charts, diagrams, or screen shots help your audience understand what you want them to do?

- How can you help your audience understand the ideas you're putting in front of them—and what do you hope they'll do as a result? Do you want them to fill out a form, subscribe to your magazine, purchase your product, or understand how much your department has accomplished this year? Knowing what kind of response you want from your communication—before you even begin—will help create the framework of the whole process for you. And the visual elements you add along the way will be more likely to take you closer to that goal.

How Visuals Help

Not too long ago, most business reports weren't very exciting. They might have had a cover page, a column or two, and maybe a page border. The title might have been in a larger font (Times Roman, most likely), and the body text was probably your basic 10-point or 12-point standard font. But it was just *business* communication, right? Better to focus on the facts and leave the fancy stuff to the marketing brochures.

The affordability of color laser printers and the ability to design attention-getting materials on the desktop have changed all that. Today we recognize that no matter what we produce, our materials are competing for readers' attention. And research shows us that documents, presentations, notebooks, and worksheets that are clear, easy to read, and include visual cues that help lead our eyes to the most important points capture our attention and reinforce key concepts in the document or presentation.

By adding special artistic effects to text; formatting headlines, captions, and tables in an inviting way; and thinking through the way you use pictures, charts, diagrams, and more, you can dramatically increase the power of your message and make sure your readers get the point.

Benefits of Pictures in Communications

The images you add to your documents, worksheets, presentations, notebooks, and e-mail messages serve several purposes. They not only add visual interest and give your readers' eyes a rest, they are also known to provide the following real communication benefits:

- Pictures linked to written text increase attention and help recall.

- Pictures help improve your readers' comprehension.

- Readers' emotional response to pictures can help or hinder communication.

- Readers with lower literacy skills show improved comprehension when pictures are used in documents.

- Captions help readers make the connection between pictures and text.

- Pictures showing outcomes, actions, or processes can help readers know what to do after reading a document.

Adding Text Effects

What are your favorite formatting features in the different Office 2010 applications? Most people use boldface text to make sure headings, row and column labels, and table headings stand out. You might also use the styles in Word or Excel to apply the look you want to the different elements in your file, make changes to font size or color, and occasionally use more specialized text controls such as small caps and strikethrough.

Word 2010 includes a number of easy-to-apply text effects that help you add special artistic touches to the text in your documents. Now in addition to using 3-D effects, you can add glows, bevels, shadows, reflections, and outlines. (See Figure 2-1.) These text effects apply directly to your text and can be included in styles you create. And they act like traditional text when you check spelling or edit your document.

Tip Did you know Paste is one of the most frequently used tools in all of Office 2010? You now have more control when you copy and paste items in your files; the Paste Options gallery enables you to preview the changes before you paste. Chapter 4, "Create and Share Compelling Documents with Word 2010," includes details on using Paste with Live Preview.
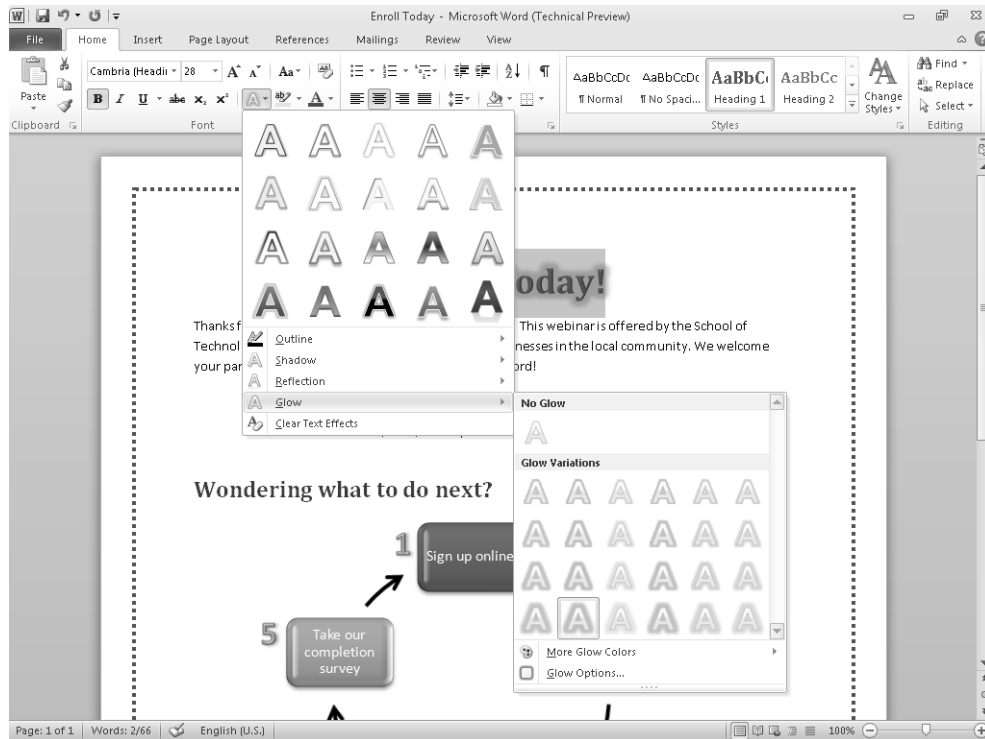
FIGURE 2-1 New text effects enable you to add artistic touches to your text.

Adding Artistry to Your Images

Great photos can be more than just nice-looking images when you apply special artistic effects to the pictures you use in your files. Now Office 2010—specifically, Word 2010, Excel 2010, Outlook 2010, and PowerPoint 2010—includes a palette of artistic filters you can apply to images in your documents. (See Figure 2-2.)
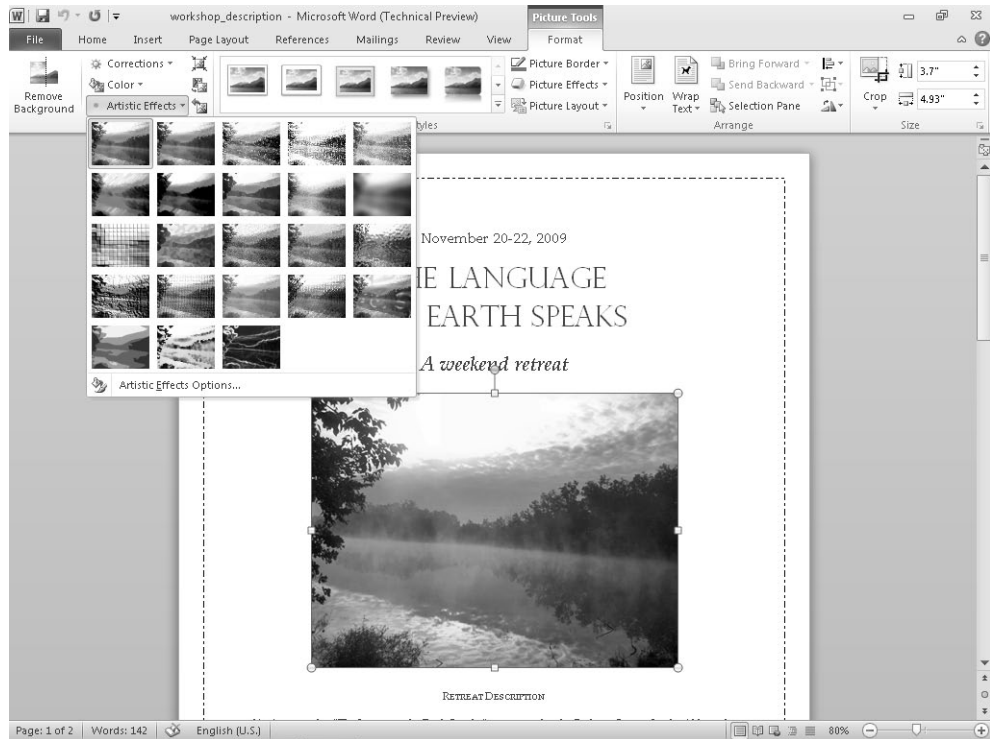
FIGURE 2-2 Choosing artistic effects.

You can choose from a variety of effects that apply different filters to the selected image, including chalk, watercolor, sponge, rain, and more. You can also use the new Remove Background feature to remove an image from the foreground and place it on a different background. This feature is great for product catalogs, or for any image in which you need to spotlight a particular element without showing a background that might detract from the central element you hope will catch the reader's eye.

Figure 2-3 shows an image with various artistic effects applied. As you can see, each image conveys a different feeling, which means it's communicating a different idea with each effect.

Photo (no effect)   Line Drawing   Pencil Grayscale
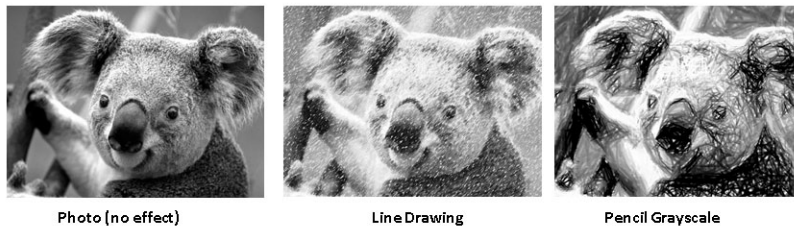
FIGURE 2-3 With artistic effects, one photo can be used to communicate several different ideas.

When will you use artistic effects in the files you create? Here are just a few ideas:

- Use an artistic photo or treatment of your company logo to show that this year's annual report demonstrates innovation and creativity.

- Create an effect viewers will remember by choosing not to show a product or place in a realistic way.

- Capture your readers' attention and communicate something new by modifying an existing photo they will recognize.

Correcting and Recoloring Pictures

Of course, not all images you take on your digital camera or phone are ready to use just as you've captured them. The lighting might be wrong in that product photo; the person might be just slightly out of focus; the range of contrast in the picture of the new building might be too great to show up well in print.

Although the Picture tools in Office 2007 went a long way toward giving you control over the images you add to your files, they were limited in the range of changes they allowed. You could adjust the picture by changing the contrast and brightness, recoloring the image, applying styles and effects, or arranging the picture on the page. The Corrections tools in Office 2010 give you a customizable palette of choices for brightness and contrast, and they allow you to set your own standards for sharpening or softening images. This means you can now insert and edit photos as you work in Word 2010, Excel 2010, PowerPoint 2010, and Outlook 2010 without ever leaving the application.

Cropping also has received a makeover in Office 2010. Now when you choose the Crop tool, the entire image is displayed in shadow behind your crop marks; you can then use the cropping tool to zoom in on the part of the image you want by resizing the image, panning to the area you want to capture, and cropping out the rest. The display makes it easy for you to select only the part of the photo that you want people to see.

Leaving the Background Behind

One of the great new artistic tools in Office 2010 is Remove Background, which lets you pull the object of a photo from its background. This is a great technique when you're preparing product information, introducing a new employee, or creating materials to spotlight a key element you don't want your readers to miss.

To grab an image in the foreground and remove it from the background of your photo, use the new Background Removal tool on the Picture Tools tab of Word 2010, Excel 2010, PowerPoint 2010, and Outlook 2010. Here's how:

1. Select the photo, click the Picture Tools Format tab, and click Background Removal.

2. Drag the bounding box to include the areas of the image you want to display. The magenta areas are those that will be removed.

3. Use the Remove Background tool in the upper left area of the Ribbon to mark areas of the image you want to keep or remove.

4. Click Close Background Removal to complete the task.

Pretty neat, eh? Experiment with this feature to discover ways you can point your readers' attention to just what you want them to see in your images.

The new Color tools also have had a major overhaul: now you can choose from a wide range of color management tools and make choices for saturation, tone, and an expanded selection of color wash effects. (See Figure 2-4.)
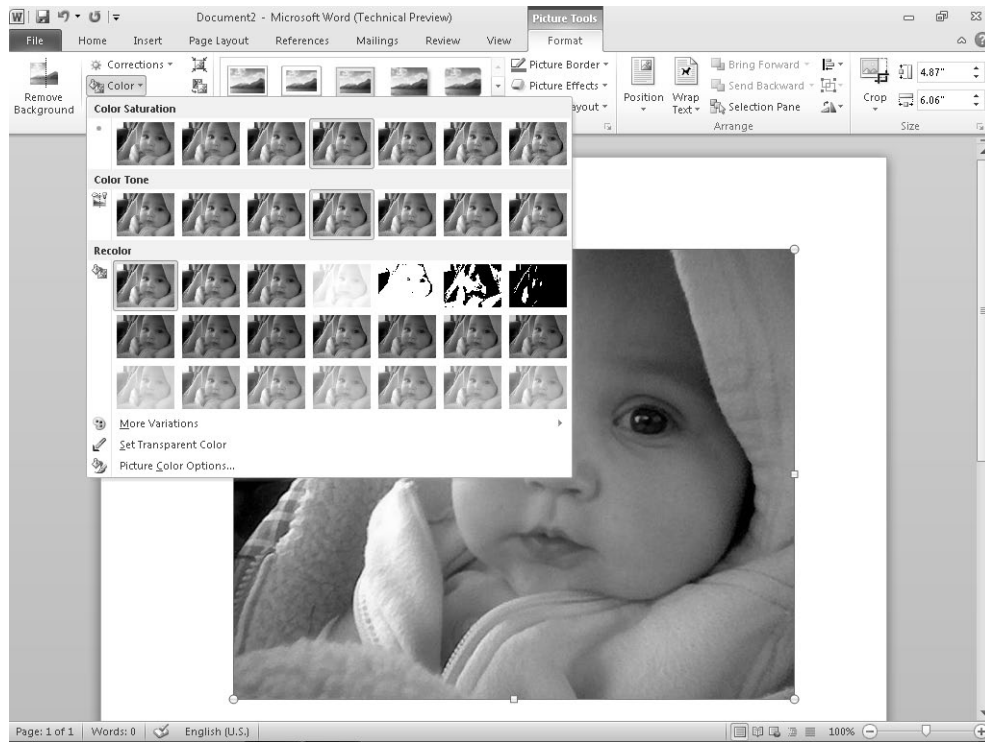
FIGURE 2-4 The Color tools in Office 2010 allow more choices for saturation, tone, and recoloring.

Color Effects Defined

If you're new to the whole landscape of picture editing, you might be wondering what the new features in the Color tools of Office 2010 enable you to do. Here's a quick introduction to the phrases and what they mean:

- *Color saturation* controls the amount of color used in the picture—in other words, how *saturated* the image is with the colors represented. A picture with a Saturation of 0 percent is a black-and-white image; a picture with a Saturation of 400 percent is flooded with color. (Use this option only for special effects.)

- *Color tone* enables you to choose the overall temperature for the image. The underlying tone for the image ranges on a scale from "cool" blues (4700 K) to "hot" oranges (11,200 K). Experiment with an image to test the range of tones, and choose the look that best fits the overall design of your file.

■   *Recoloring* applies a color filter to the image, making it monochrome (in blue, red, green, or purple, for example) and creating a special artistic look that can fit the color scheme in the file you're preparing.

Working Font Magic in Word 2010 and Publisher 2010

Another new feature in Office 2010 that adds a touch of visual sophistication to the files you create is support for OpenType typography. OpenType fonts are a type of scalable font developed by Microsoft and Adobe to provide an expressive font format that enables software users to create files reflecting an increasingly diverse range of languages. Word 2010 and Publisher 2010 now support the typography features found in some OpenType fonts, such as working with ligatures and stylistic sets. Word 2010 and Publisher 2010 also include support for Number Forms and Spacing. (The feature is called Number Styles in Publisher.)

A *ligature* is a character in typography that consists of two or more connecting letters; for example, the letters *fi* are often set as a ligature. Ligatures were originally invented (back in the dark ages when typesetters cast type in lead before inking them and printing pages) to save space and reduce typesetting effort.

A *stylistic set* is a font displayed with a specific set of characteristics, enabling you to get a subtly different look and feel for selected text even though you're using the same font throughout a document. Gabriola, a new font in Office 2010, offers a variety of stylistic sets you can try in your documents. Different stylistic sets might give you a whole range of choices for that particular font, including whether you want to display serifs or not, how characters with extenders are displayed, and much more.

To see your typography choices in Word 2010, click the dialog launcher in the Font group on the Home tab, and then click the Advanced tab. The Ligatures setting enables you to choose how you want the ligatures to be applied when they are available, and the Stylistic Sets choice offers a list of available sets you can select for the current font. Figure 2-5 shows several different stylistic sets selected for a headline in the Gabriola font. Take a close look at the length and shape of the extenders on the letters *h*, *k*, and *p* as well as the spacing between the characters to see the difference.
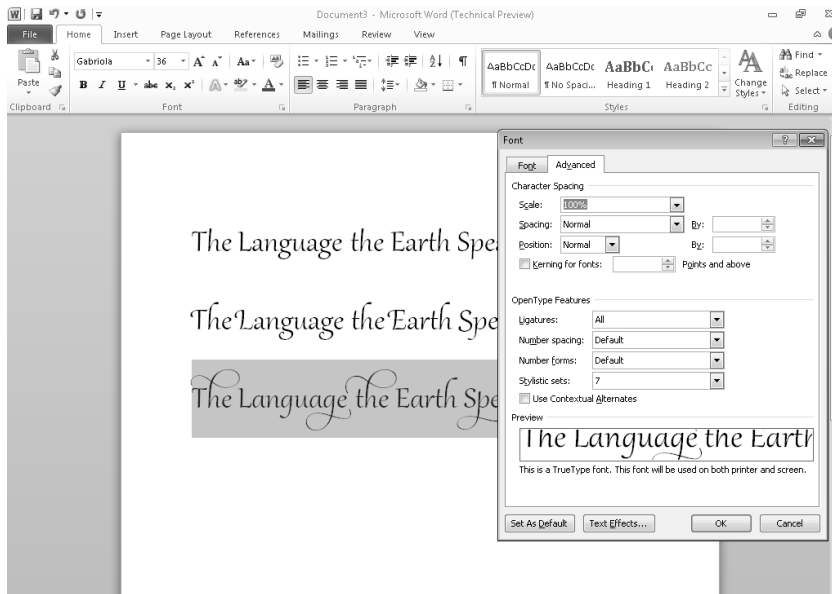
FIGURE 2-5 Fine-tuning fonts in Word 2010.

Ligatures and stylistic sets work similarly in Publisher 2010. Here you can choose the typographical controls from the Typography group in the Text Box Tools Format contextual tab. (See Figure 2-6.)
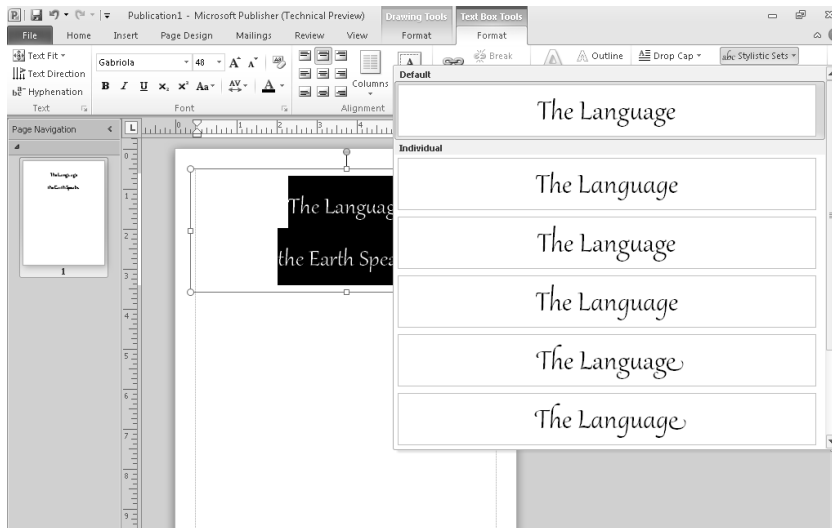

FIGURE 2-6 Choosing a stylistic set in Publisher 2010.

Tip Publisher 2010 also includes a number of specialized font options, including stylistic alternatives, and specialized number styles. You'll learn more about the steps involved in working with fonts in Publisher 2010 in Chapter 10, "Create Effective Marketing Materials with Publisher 2010."

Creating Data Visualizations in Excel 2010

If you work with numbers all day long, you're probably comfortable with a language many other people struggle to understand. Equations and trend lines make perfect sense to you; business intelligence is part of your language; numbers tell you what you need to know about product status, market saturation, and potential return on investment. You build your documents and presentations around these numbers.

But wait a minute! Could you please translate that for the rest of us?

Excel 2010 now includes simple but effective tools that will enable even the most advanced numbers people to show the rest of us what the numbers mean in a language we can understand. Take sparklines, for example. Newly added *sparklines* are small graphical representations of data on your worksheets—small charts that can depict a trend and visually convey to your audience what the values actually mean. Sparklines can show, for example, an increase in enrollment for new webinars, a spike in sales related to a recent event, or a fall-off in hard goods purchasing.

When you use sparklines to illustrate the data in your worksheet, you help those for whom numbers might be a foreign language stop struggling with what it all means and enable them to clearly understand your point. Figure 2-7 shows simple sparklines added to a column on a worksheet to illustrate the data trend reflected in the displayed row.

The conditional formatting features in Excel 2010 have been improved and expanded with new icon sets, data bars that are capable of showing negative values, and proportional displays in data bar sets. You can also control the formatting of data bars to get just the right effect in the worksheets and documents you prepare.

Tip For more detail on using sparklines and making conditional formatting improvements to your Excel worksheet, see Chapter 5, "Create Smart Data Insights with Excel 2010."
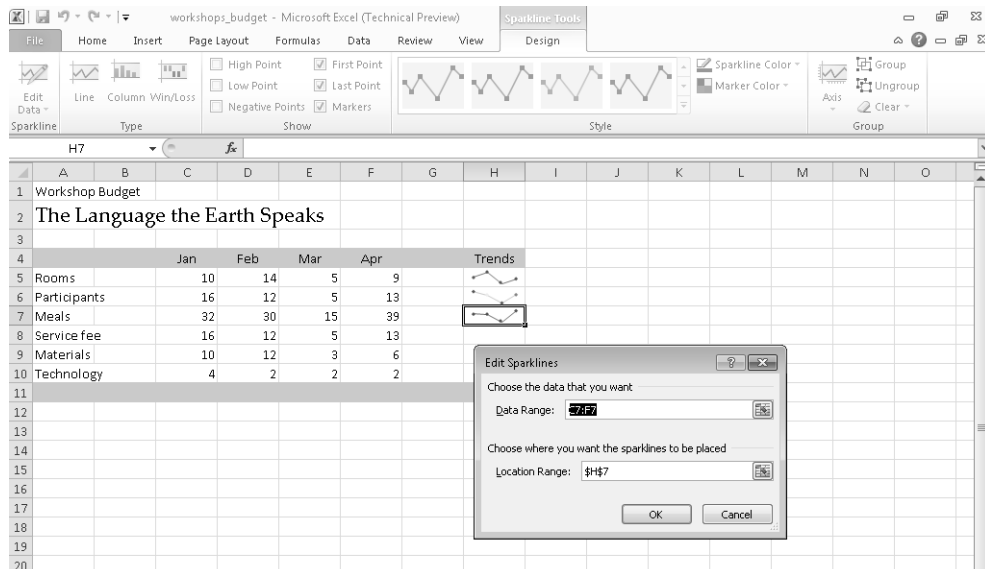
FIGURE 2-7 Sparklines give you data snapshots in Excel 2010.

Editing Video in PowerPoint 2010

It's no secret that seeing how something is done in video format is a simple way to learn a new technique, whether you're changing the oil in your car, learning how to plant a rosebush, or designing a new brochure in Publisher 2010. A video clip enables you to share with others the "how to" as well as the "why" because you can explain the reasons for the action while you're demonstrating the technique for those viewing the clip.

Are you ready to let your creativity out of the box? Take a look at the new video capabilities in PowerPoint 2010. Now the video from your files is embedded by default, which means that you no longer have to carry all your media files along whenever you copy, move, or share a presentation. Because the video is embedded, you can edit the video directly in PowerPoint without using any other video-editing software.

The video-editing features in PowerPoint 2010 enable you to shorten long video segments, apply fade-in and fade-out settings, add bookmarks to help you quickly access important points in the video or even trigger animation from key points in your video. Figure 2-8 shows you several of the available video-editing capabilities in PowerPoint 2010.

Tip If you have online video you'd like to use in your PowerPoint 2010 presentation, you can easily embed the code from the online video site right in your PowerPoint slide. To find out more about how to do this, see Chapter 7, "Produce Dynamic Presentations with PowerPoint 2010."

FIGURE 2-8 PowerPoint 2010 includes powerful video-editing and formatting tools that enable you to modify video without leaving the program.

Communicating Visually in Access 2010

Maybe it's all about the data for you. You design elegant databases; you create new data tables and forms. You know how to put together such a sophisticated query that it leaves others in awe. When you need to communicate your ideas to others who aren't as comfortable with data as you are, chances are that you know what happens when other peoples' eyes glaze over. They are no longer listening, which means they aren't following what you're saying. How can you make sure they understand what your data is saying in a way that makes sense? Access 2010 data visualizations can help.

Conditional formatting in Access 2010 now supports data bars, which enable you to depict data visually so that your audience can understand your ideas. See Figure 2-9. In addition to the traditional data bars, now you can set negative values for data bar display as well. Improved tools in Access 2010 enable you to apply a greater range of conditional formatting to the tables and reports you create. Here are other ways you can add visual elements to Access 2010:

- Include data bars, icons for minimum and maximum values, and more.

■ Display an image on the background of your reports by using the Background Image feature in the Report Design Tools Format tab.
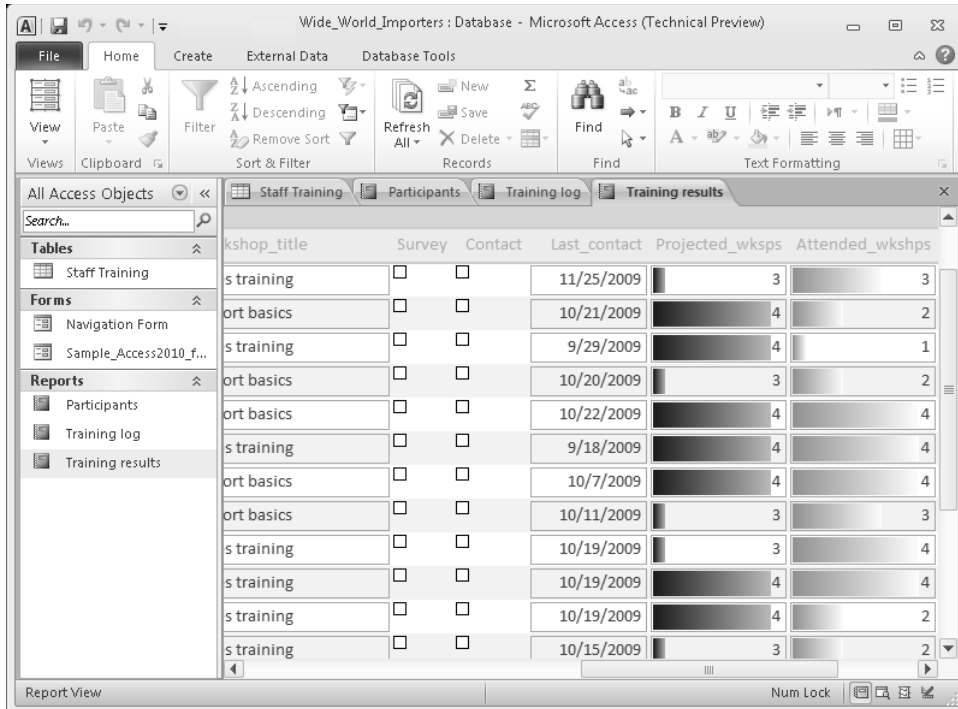
FIGURE 2-9 Access 2010 lets you add data bars that help you compare data values at a glance.

Enhancing and Streamlining Communications in Outlook 2010

One of the big changes you'll notice right away in Outlook 2010 is that the Ribbon replaces the menu and toolbars at the top of the main Outlook window. (See Figure 2-10.) Now all the tools you need—including the new Quick Steps—are within easy reach and you can find the right commands when you need them.

All the formatting capabilities—SmartArt graphics, styles, and Office themes—are available for the e-mail messages you create. This means that even though the messages you create compete for attention with the hundreds of messages your recipients receive, you can take steps to make sure your messages are as compelling and inviting as possible.

Depending on the nature of the work you do, the feature that enables you to include screen shots in the messages you send can be a big help. (See Figure 2-11.) If you help customers find products online, support your staff through technical training, or assist users as they try

to find specific items on your Web site, including a screen shot can show readers what you're talking about and help them understand an important process.

> **Tip** Setting up Outlook 2010 to send items to your mobile phone is as simple as clicking the File tab to display Backstage view, choosing Options, and clicking Mobile. If you have an SMS Service Provider, you can send calendar items, reminders, and messages to your mobile phone by simply choosing the options you want to set and clicking OK. If you don't yet have an SMS Service Provider, you can find one on Office.com.
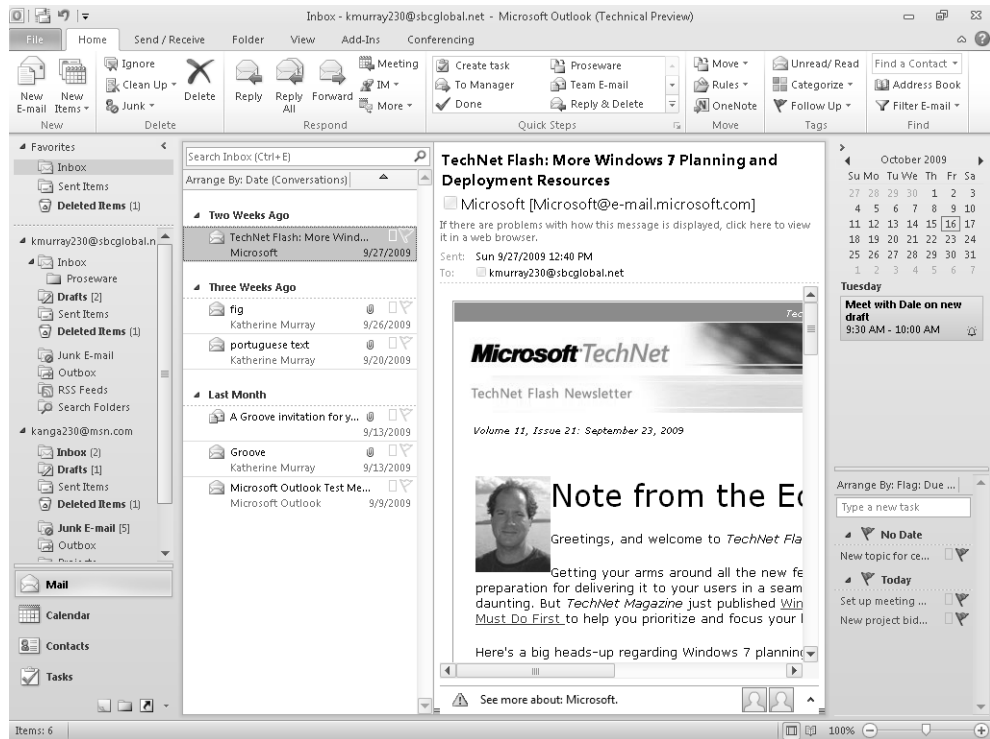
FIGURE 2-10 The main window of Outlook 2010 now sports the Ribbon, offering the tools you need within easy reach.

Not only can you make your e-mail messages look more attractive and inviting for those you contact, but Outlook 2010 gives you a number of ways to keep up with the mountain of messages you receive every day. Here are a few of the key features that help you manage the volume of mail you receive:

- Work faster with *Quick Steps*. The addition of Quick Steps enables you to carry out routine tasks with a quick click of the mouse. Now you can move a message to a specific folder, reply to a meeting, or send a message to your team with one little click. Simple.

■ *Conversation View* enables you to view the most relevant threads of a conversation and suppress redundant threads. Having the ability to remove redundant messages in the conversation saves Inbox space and helps you manage the volume of e-mail you receive.

■ Easily manage and clean up threads and move on to more pressing tasks without getting bogged down in messages that don't relate to the task at hand.

■ Easily manage your *multiple e-mail accounts*, whether you want to combine home and work or any one of a number of Web-based e-mail accounts. Now you can bring them all together in one place with Outlook 2010.
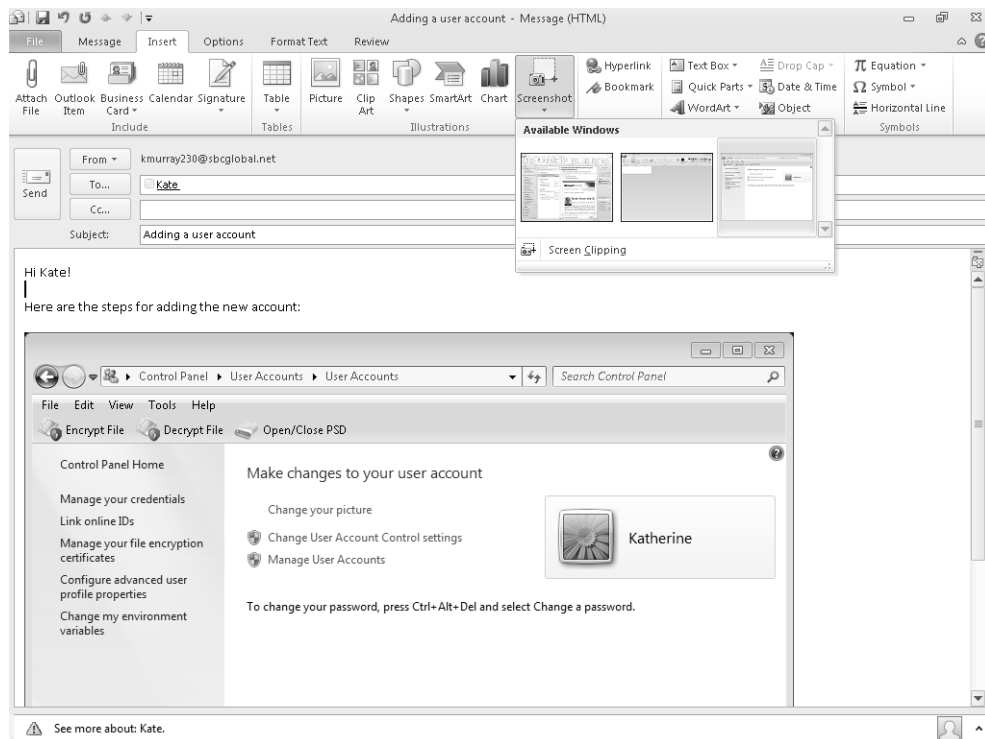
FIGURE 2-11 With Outlook 2010, you can easily add and enhance pictures, screen shots, and more.

Coming Next

In this chapter, you learned about the range of features in Office 2010 that enable you to add visual effects and enhancements to the ideas you share with others. You explored new and improved features in Word 2010, Excel 2010, PowerPoint 2010, Outlook 2010, Access 2010, and Publisher 2010. The next chapter gives you this same kind of big-picture view of the collaboration features you'll use as you work with teams in your office or around the world.

Chapter 3

Collaborate in the Office and Around the World

In this chapter:

- It's All About the Teamwork
- Benefits of Office 2010 Collaboration
- Stay in Touch with Your Team
- Co-Author Files Across Applications
- Use the Presence Icon to See Author Availability
- Using the Office Web Apps
- Sharing on the Road with Office Mobile

Depending on the type of work you do, you might work on your own most of the time, or you might work as part of a larger group—or perhaps, several groups. Your groups might come together to complete a specific project—for example, to produce a new marketing plan—or they might work together over the long term, completing multiple projects. Whether your need for collaboration is short term or ongoing, you'll find features in Office 2010 that enable you to

- Work with others simultaneously on the same file.
- Connect instantly with others working on your document or presentation.
- Know when others are actively working in the document you are viewing.
- Collaborate in real time with others working from their PCs, browsers, or phones.

It's All About the Teamwork

As the world grows smaller and more accessible, our teams expand and grow. Today it isn't unusual to have someone from another continent on your team—whether the home office for your company is in the U.S., the U.K., India, or another Web-enabled place on the globe. In a team context, we plan projects, assign tasks, share documents, work collaboratively on files, resolve problems, and ultimately produce materials that further the missions of our companies, reach customers, and accomplish the tasks we're asked to complete.

What Teams Look Like Today

So how many of us are working in groups today? The exhaustive research data Microsoft compiled shows that 52 percent of those surveyed currently work on two or more project-based teams. Others responded that most of their work is done independently, but they collaborate with others occasionally.

How do teams work collaboratively?

- Surprisingly, many workers collaborate by e-mail, sending versions of documents back and forth. This isn't the most accurate or most secure method of working collaboratively because file versions can be misplaced and a sensitive file might be vulnerable to interception unless it's encrypted or sent only on the company intranet.

- Others collaborate via instant messaging (IM), discussing projects, making decisions, and planning next steps.

- Still others use social networking tools to discuss items in a group, set up an event, and more.

- Some businesses encourage the use of an employee portal or provide collaboration software to facilitate teamwork.

- Other ways to collaborate include face-to-face meetings (of course) as well as shared blogs, wikis, SharePoint sites, and more.

Office 2010 makes collaborating a natural and intuitive process by bringing collaboration tools into all the major applications. You can share your team document on SharePoint, share OneNote notebooks, create Word and PowerPoint projects, and ask fellow authors questions while you work.

Team Tasks and Methods

In most workplace environments, teams are made up of people who are brought together by role, not by choice. This means you might be part of a group that is an interesting mix of personalities and talents. No matter how similar or how different team members might be, your team will need to accomplish two primary goals to be productive and deliver what you came together to create:

- You need to be able to communicate effectively.
- You need to find a way to solve problems.

The content of each team's tasks might vary widely. One team might be organized to assess the need for a human resources program; another team might come together to produce an annual report. Still another team might be charged with planning, hosting, and evaluating a national event.

Whatever the focus your work has or whatever the objective is you're working toward, you need to be able to share information, connect with others, and coordinate your efforts. Along the way, each and every team needs to discover how to work together most effectively to get the job done.

A Quick Look at Group Process

American psychologist Bruce Tuckman studied group dynamics, and in 1965, he proposed that every group goes through four stages:

Forming → Storming → Norming → Performing

- *Forming* is the stage in which the group comes together. During this stage, the members get to know one another and begin the process of communicating. Some members might be polite and others might be anxious, but basically everyone is on his or her best behavior.

- *Storming* is the stage when team members begin evaluating their place in the group and struggling to determine the overall work goals of the group. Personalities might clash at this point as the group begins to carve out helpful ways to interact.

- *Norming* occurs when the group members begin to settle into individual roles that feel like a good fit for the group. The anxiety of testing roles and boundaries calms down, personality differences are less of an obstacle, and the leadership of the group seems suitably established.

- *Performing* is the stage when the group finally comes together as a team. The group has a shared vision of the final goal of the work and is able to move productively toward that end.

In the 1970s, Tuckman added a fifth stage that he called *adjourning*, which involves disbanding the group. This stage might bring anxiety for group members, but it also offers closure if the group was convened to accomplish a specific goal or complete a project.

Benefits of Office 2010 Collaboration

No matter where your team might be in the group-formation process, the tools in Office 2010 can help you communicate effectively, share questions and concerns, complete project-related tasks, and speak each others' languages. With the tools in Office 2010, you can streamline the following team-related activities:

- Staying in touch no matter where you're working

- Creating shared folders that others can use to access project assets such as images, logos, charts, documents, and more

- Working with more than one teammate on the same file at the same time

- Checking the online status of other authors of your shared document using the presence icon

- Translating words and phrases easily as you work

Stay in Touch with Your Team

Office 2010 Professional Plus includes SharePoint Workspace 2010, a data-sharing workspace that enables you to have access to all the files and data you need as you work with your team. With SharePoint Workspace 2010 (shown in Figure 3-1), you can create a team work-space that gives you access—both online and offline—to tasks, links, announcements, team discussions, and document and picture libraries.
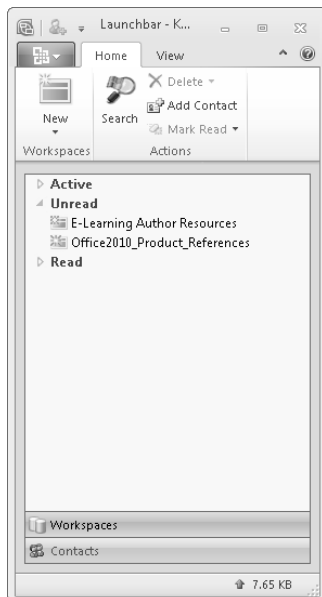

FIGURE 3-1 SharePoint Workspace 2010 enables you to take your work offline and share your files and other project resources with team members.

Share Files in the Workspace

You can create new workspaces related to specific projects your team will be working on and set up the elements you want to share. Because SharePoint Workspace 2010 is a true Office 2010 application, you can simply drag and drop the files you want to work on later offline or make available to the team into the Documents library. (See Figure 3-2.)
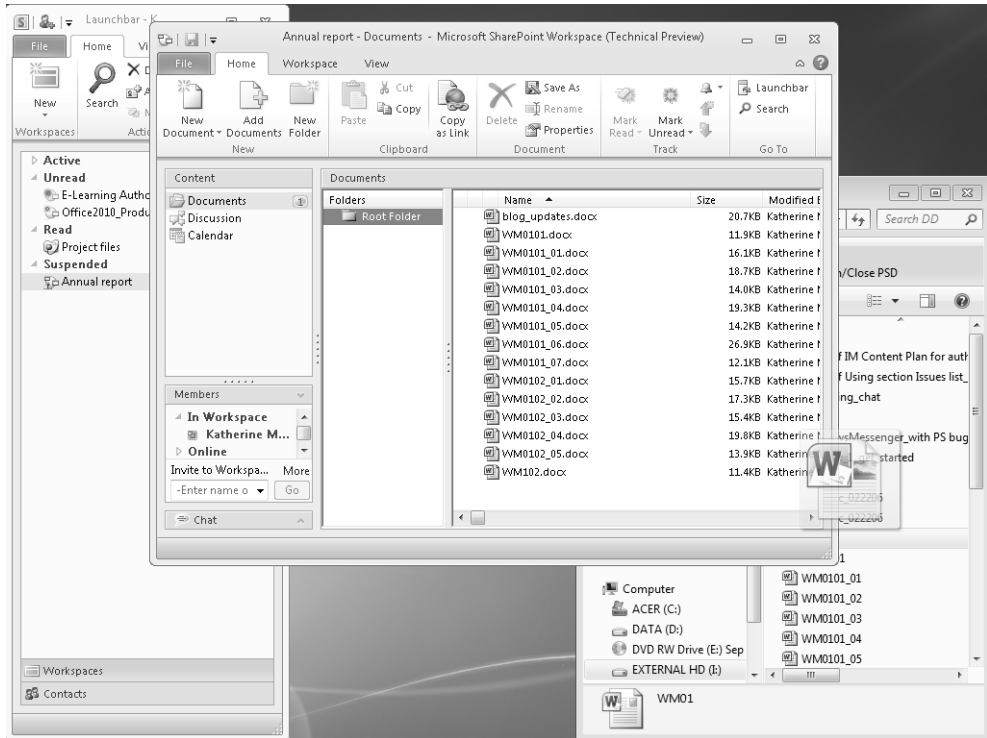
FIGURE 3-2 You can easily drag and drop files to a workspace to share items with the team.

The files are available whether you're offline or connected to the server; when a server connection is established, features such as Check In and Check Out are enabled, and you can navigate easily through the original site to sync, download, or review files.

Not only can teams share files, post announcements, and chat in real time in SharePoint Workspace 2010, but team members can also post to a discussion board to carry on conversations related to the project at hand. (See Figure 3-3.) A chat feature also is available to allow team members to ask and answer quick questions as they work in the space.

FIGURE 3-3 With SharePoint Workspace 2010, you can have conversations with teammates on topics related to your shared project.

Share Files and Folders

SharePoint Workspace 2010 also enables you to create shared folders in your own system so that you can exchange files easily with y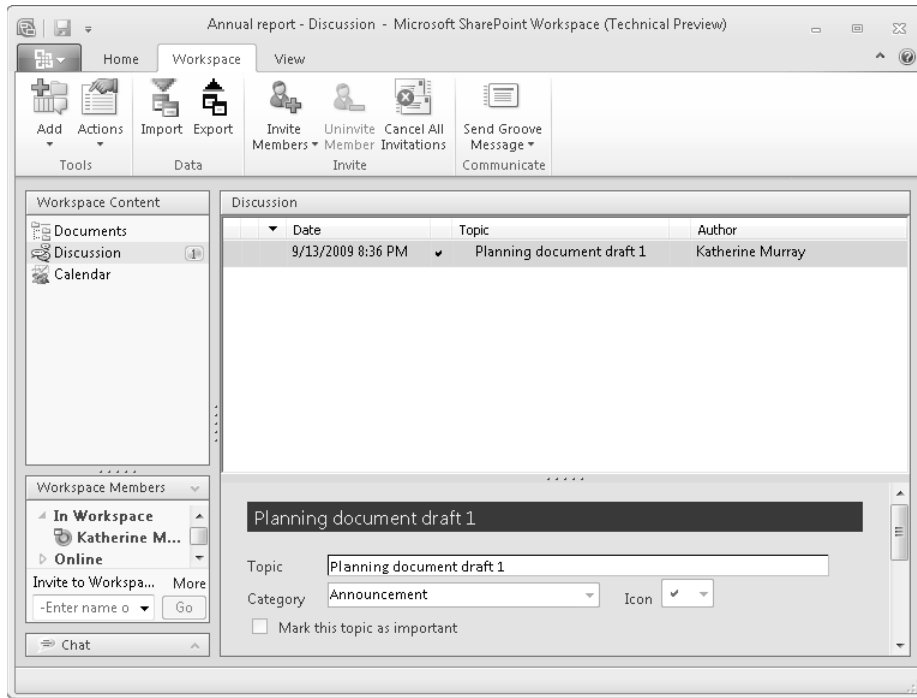our server or share them with other people. By creating and sharing a folder with files related to your specific folder, teammates can access the resources they need in the shared folder you created. This enables you to share files easily without uploading them to your company's server space and also gives you an easy way to organize and work with files you eventually check back in to the server.

Co-Author Files Across Applications

The new co-authoring feature, available in Word 2010 and PowerPoint 2010, is one of the new collaboration features in Office 2010. Co-authoring is also available in the Excel Web App. Now you can work collaboratively on a document at the same time others are working in the file. You can edit files in real time, coordinating your changes, talking about revisions, and reviewing the work of each person on your team.

Tip You also can simultaneously edit a shared notebook that is stored on SharePoint or Windows Live with others who are using OneNote 2010, OneNote Web App, and OneNote Mobile 2010.

No matter how many people on your team are working together online at the same time, each person can work on her respective section, and then changes are synchronized automatically when the file is saved or when the user logs on the next time. The names of all authors are displayed next to the areas of the document they are editing. Additionally, a pop-up list of available authors is available on the application status bar when the shared document is active. (See Figure 3-4.)

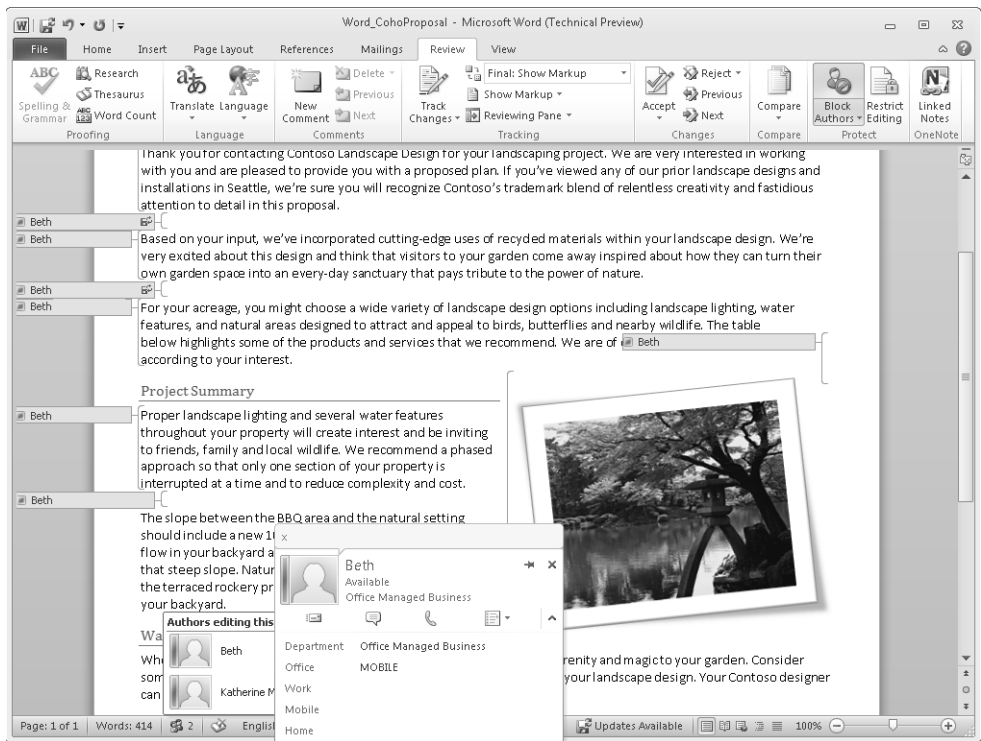
FIGURE 3-4 Co-authoring enables you to see who else is working on the current document.

Note Co-authoring requires Office Communicator 2007 R2 and Office Communications Server 2007 R2. For Office 2010 users in a business environment, SharePoint Workspace 2010 is also needed for co-author capability. Home users can use Windows Live as the co-authoring platform for file collaboration.

Connect via Presence

The Presence icon is a new feature in Office 2010 that shows you the availability of team members when you're working on shared documents. When you point to the icon, a contact card expands, listing the ways you can contact that person. (See Figure 3-5.)

If you're using Windows Live for document sharing, you'll be able to send an instant message to other authors working on the document. You'll also be able to schedule a meeting, add the author to your Microsoft Outlook contacts, and work with Outlook properties. If you're using Office Communicator R2, you'll have these choices and also be able to start a video call, tag the contact for presence alerts, and add the contact to your Quick Contacts list.
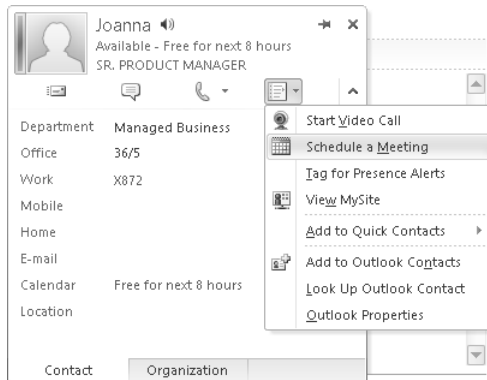
FIGURE 3-5 When you click the Presence icon of a contact, the contact card for that person is displayed.

So how does Office 2010 know all this information about the various members of your team? The Presence icon reflects online status information available in either Windows Live or Office Communicator.

Microsoft Office Communicator 2007 R2

Microsoft Office Communicator 2007 R2 is an enterprise communications tool that enables you to unify the various ways you communicate with others—by e-mail, instant message, voice, or video.

Microsoft Office Communicator 2007 R2 requires Microsoft Office Communications Server 2007 R2, which runs only on 64-bit systems. Communicator client does not require a 64-bit computer.

Using Office Web Apps

Today more and more of us are escaping the confines of the cubicle and venturing out to work in unusual places—the corner coffee shop, classroom, convention floor, park bench, or client office. Flexibility is good, but we also need an easy, secure, and reliable way to access mission-critical documents and files. We need to review records, update reports, quickly check the budget, get an estimate on reservations, and approve the finals on the four-color report before it goes to the printer.

The new Office Web Apps enable you to access and work with your files anywhere in the world you have Web access. (See Figure 3-6.) And if you don't have Internet Explorer, no problem—Office Web Apps support Windows Internet Explorer 7 or later for Windows, Safari 4 or later for Mac, and Firefox 3.5 or later for Windows, Mac, and Linux. That means that whether you're logging in on a Mac, PC, or kiosk at a hotel or airport, you'll find the same reliable Microsoft Office interface and be able to review, edit, and save the files that are important for your work.

FIGURE 3-6 Office Web Apps offer the consistent look and feel in an easy-to-use, light editing interface.

Sharing on the Road with Office Mobile

Office Mobile 2010 (shown in Figure 3-7) lets you take Office with you wherever you go—whether you're carrying your laptop with you or not. Using Office Mobile 2010, you can easily check e-mail in Outlook Mobile 2010, organize your inbox, update schedules and tasks, and even work on your favorite Office documents, all from your favorite smart phone.

The rich interface for small devices enables you to view and edit files from your mobile phone. You can choose from a variety of display options, perform editing and formatting operations, and send files to SharePoint Server 2010 or to your Windows Live account.
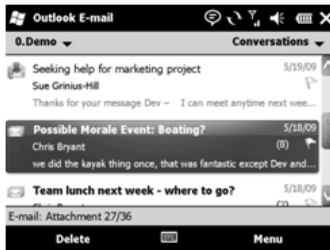

FIGURE 3-7 The clear, easy-to-read Office Mobile interface makes it simple for you to read e-mail, work with Office Mobile applications, and send and receive files.

Coming Next

The collaboration features in Office 2010 enable you to continue working with your favorite applications in real time, no matter where you are or who you're working with. With SharePoint Workspace 2010, you can keep your team headed in the right direction; using the coauthoring features and the presence icon, you can work collaboratively on documents and contact other authors in your shared documents. And Office Web Apps and Office Mobile both help you access your files remotely so that you can keep things moving whether or not you're able to be at your desk to do it. The next chapter kicks off Part II of this book by showcasing the new features available to you in Office Word 2010.

Part II
Hit the Ground Running

Each of the applications in Office 2010 offers new ways to communicate your ideas more visually and effectively, features that enable you to collaborate easier than ever before, and ways to access your work from anywhere, anytime. Whether you spend your time in Office 2010 generating content, managing projects, or analyzing financial data, you will discover new capabilities that streamline your tasks, add professional impact, and add flexibility and creativity along the way.

This part of the book introduces you to the new features in each application and gives you some hands-on experience with different elements so that you can get up to speed quickly with this new release:

- Chapter 4: Create and Share Compelling Documents with Word 2010
- Chapter 5: Create Smart Data Insights with Excel 2010
- Chapter 6: Manage Rich Communications with Outlook 2010
- Chapter 7: Produce Dynamic Presentations with PowerPoint 2010
- Chapter 8: Organize, Store, and Share Ideas with OneNote 2010
- Chapter 9: Collaborate Effectively with SharePoint Workspace 2010
- Chapter 10: Create Effective Marketing Materials with Publisher 2010
- Chapter 11: Make Sense of Your Data with Access 2010
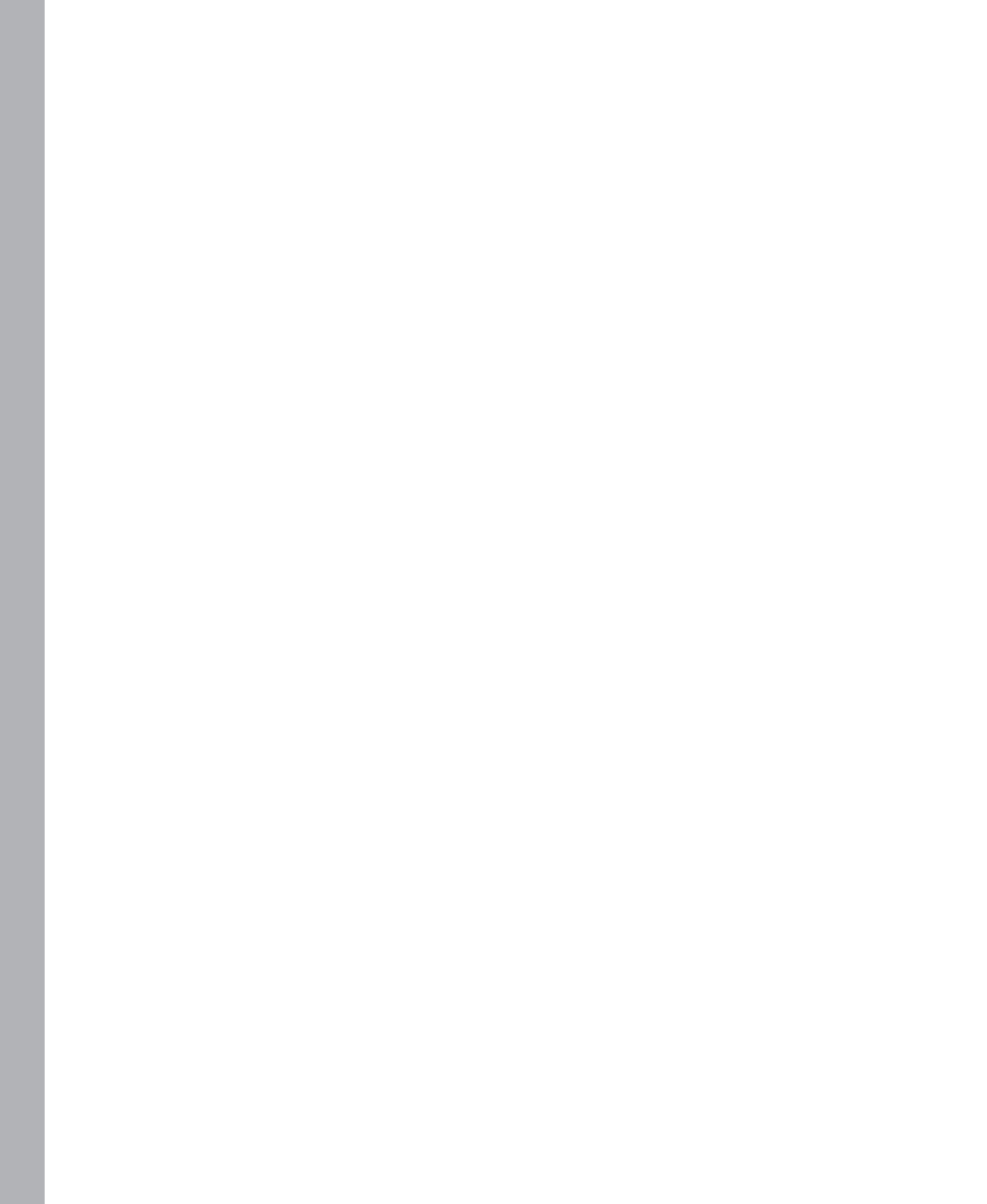
Chapter 4
Create and Share Compelling Documents with Word 2010

In this chapter:

- Start Out with Word 2010
- Format Your Text
- Illustrate Your Ideas
- Improve Your Text
- Co-Author Documents
- Access Your Documents Anywhere

What's the big story in Microsoft Word 2010? Think flexibility and freedom of expression. Imagine working on documents in the quiet of your neighborhood coffee shop, collaborating with a coauthor who lives in Taipei, or doing a quick review on your smartphone before you forward the document to a major client.

Word 2010 is designed to be simple to use and yet give you all the tools you need to create sophisticated, professional documents that express your ideas clearly and well. The new features enable you to work efficiently and collaboratively, in a consistent, familiar interface, whether you're working on your computer, in your browser, or on your smartphone.

Additionally, you'll discover simplified ways for getting around in the document and an expanded slate of tools that enable you to include great quality fonts and picture effects so that your finished product looks as good as possible. This chapter introduces you to the key new features in Word 2010 and encourages you to try a few techniques along the way.

Start Out with Word 2010

The Word 2010 window is designed to help you focus on the task at hand, whether you are writing, formatting, editing, illustrating, securing, or sharing documents. The Ribbon (shown in Figure 4-1) stretches across the top of the window, providing all the tools you need, just when you need them. The status bar at the bottom of the window enables you to get current statistics on the document as you work (for example, checking the number of words in the file) and change views so that you can display the document in different ways.
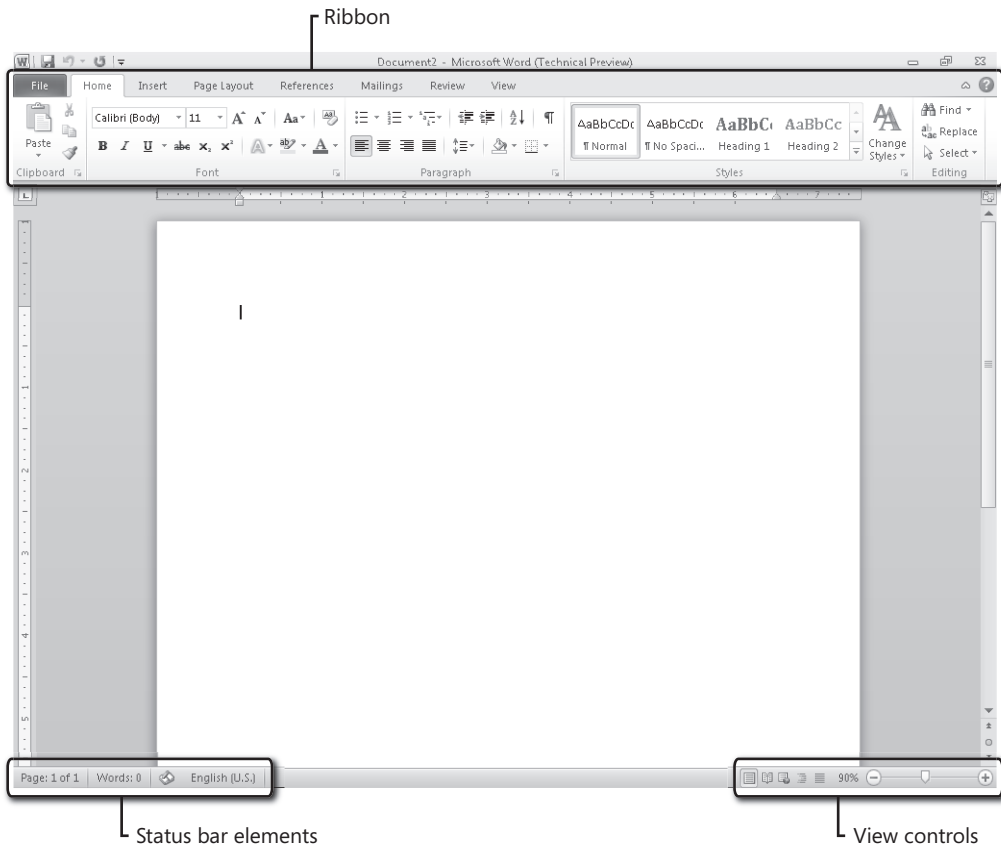
Ribbon

Status bar elements   View controls

FIGURE 4-1 The Word 2010 window maximizes your workspace while providing tools across the top and document information and views along the bottom.

Tip To display the Customize Status Bar list and add other information elements to the status bar, right-click the status bar at the bottom of the Word window.

Get Familiar with the Word Ribbon

The Ribbon in Word 2010 makes it easy for you to find just the tools you need when you need them. (See Figure 4-2.) Tabs contain tools related to specific tasks you want to complete. The Insert tab, for example, includes the tools you need to add illustrations, links, tables, and much more.
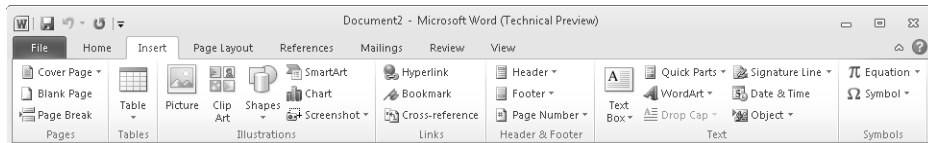
FIGURE 4-2 The Ribbon offers just the tools you need, depending on what you're working on in Word.

Contextual tabs appear when you select a specific element in the document—for example, when you click a picture, the Picture Tools contextual tab appears, as you see in Figure 4-3.
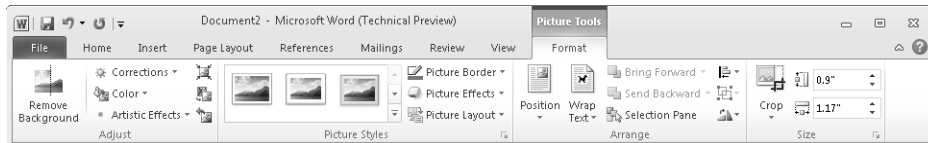

FIGURE 4-3 Contextual tabs offer tools that relate to the selected object in the document.

One great feature common to all Office 2010 applications is the ability to customize the Ribbon so that you can add your own tabs, putting together the tools you use most often in the configuration that fits you best. You can create your own custom tabs or tab groups, and move tools on the existing Ribbon tabs to create groups just the way you want them.

> **Tip** You can hide the Ribbon easily and maximize your work area by pressing Ctrl+F1 or clicking the Minimize The Ribbon button on the right side of the window above the Ribbon.

Find What You Need Easily with the Navigation Pane

The new Navigation Pane is a great addition to Word 2010. Combining the best of the Find utility with Outline view and thumbnail displays, the Navigation Pane gives you multiple ways to find what you're looking for in your document. Now you can move right to a section in your document by clicking the heading you want (as shown in Figure 4-4), scroll through the list of page thumbnail images, or enter a search phrase and choose from the list of results (as shown in Figure 4-5).
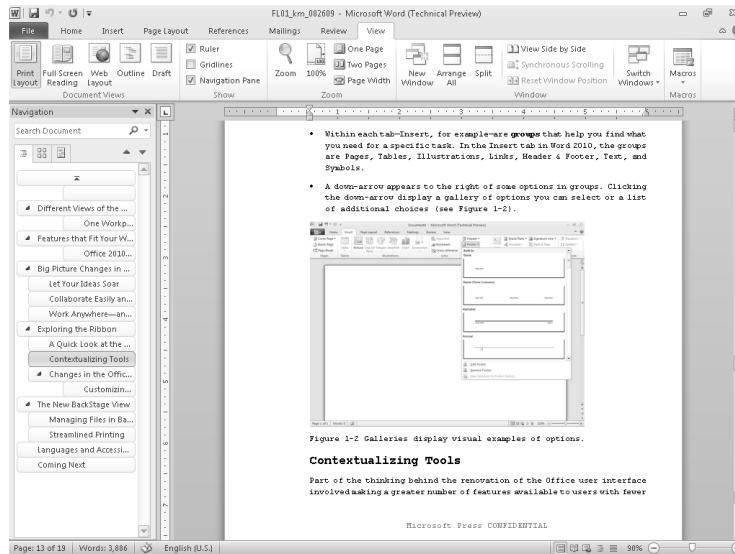
FIGURE 4-4 With the Navigation Pane, you can move easily through the document by clicking the heading of the section you want to see.

The improved search features offered in the Navigation Pane enable you to find the content you need, whether it is in the basic body text or headings of the document or whether it appears in your document in the body text, headings, tables, graphics, footnotes, sidebars, or comments.

FIGURE 4-5 The powerful search capability in the Navigation Pane displays a clickable results list showing all the places in the document your search word or phrase appears.

Print and Preview in a Single View

If you are like most Word users, you print your documents on a regular basis. And using Print Preview is part of the process, enabling you 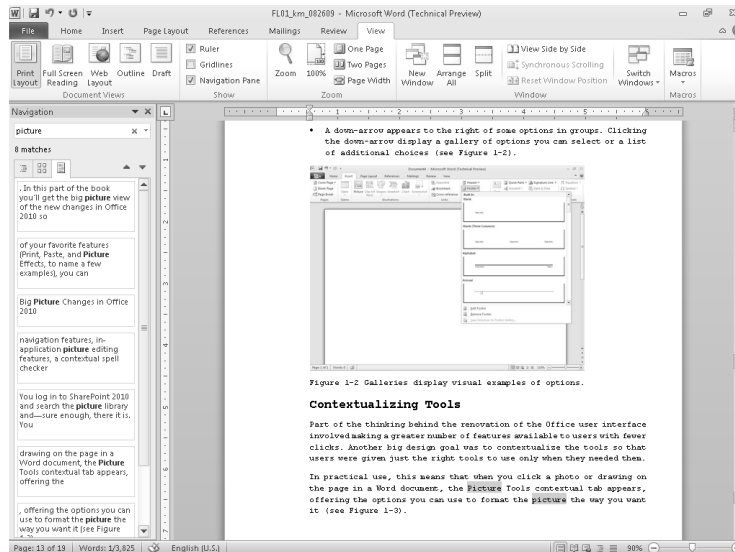to make sure the overall page looks the way you want it to look, the pictures are in the right places, and the headings are in the appropriate spots. Word 2010 smooths out the printing process by combining the print and preview tasks into a single step.

Now you can preview and print your document in Backstage view with literally a single click. You can still change your print options, setting print quality, choosing the paper source and size, and specifying the number of copies before you print. You can also page through the document easily and shrink or enlarge the page view so that you can check all details easily before sending the document to the printer.

Format Your Text

Word users typically spend quite a bit of time formatting documents. New features in Word 2010 enable you to apply stylized effects to text, use high-quality fonts, and choose just the right paste options for the task at hand so that your documents look professional with just a little help from you.

Did You Know?

- Eighty percent of all documents use fewer than 20 styles.
- Word users include an average of 16 styles in each document.
- The most common formatting changes are font size, font face, and font color.

Step by Step: Printing and Previewing

Because the print and preview features are streamlined into one process in Word 2010, you can easily review and print the file. Here's how to print and preview a document in Backstage view:

1. Open a document or create a new document that you'd like to print. If you create the file, save it before you prepare to print.

2. Click the File tab on the Ribbon. This displays the Word 2010 Backstage view.

---

3. Click Print. The document appears in the Print Preview window to the right of the Print options.
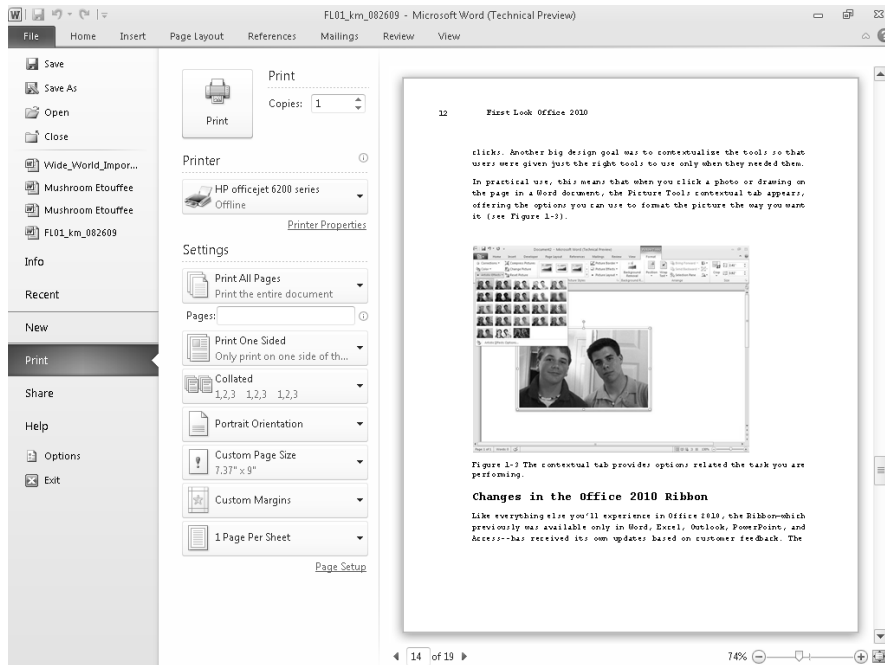
4. Preview the document by clicking the Previous Page or Next Page controls in the bottom left corner of the preview window. You can also change the size of the page display by adjusting the Zoom control in the lower right corner of the preview window.

5. Use the options in the center column to choose the print settings you want to apply to the printed document. For example, you might need to select your printer, specify the pages you want to print, or change from one-sided to double-sided printing.

6. When the document in the preview looks the way you want your printout to appear, click the Print button at the top of the center column.

Tip Before you print a long document or multiple copies of the same document, test print one copy to ensure the format of the document and the page margins appear the way you want them to.

Apply Text-Formatting Effects

You'll find a number of features in Word 2010 that help you create a pleasing, professional look for documents of all types. Document themes let you choose a consistent color scheme, font style, and object format; Quick Styles give you a gallery of text styles to apply to your text; and the Font and Paragraph groups in the Home tab enable you to make changes to individual words, phrases, lists, and more in the documents you create.

Now Word 2010 gives you the ability to add special touches to the format of your text. You might use a special text effect to create a compelling headline, make a product name stand out, or create an attention-getting banner for a flyer or brochure. You'll find the Text Effects tool in the Font group of the Home tab. Clicking it reveals a list of ready-to-apply text effects, as well as a collection of artistic effects (Outline, Shadow, Reflection, and Glow) that enable you to fine-tune the look even more. (See Figure 4-6.)
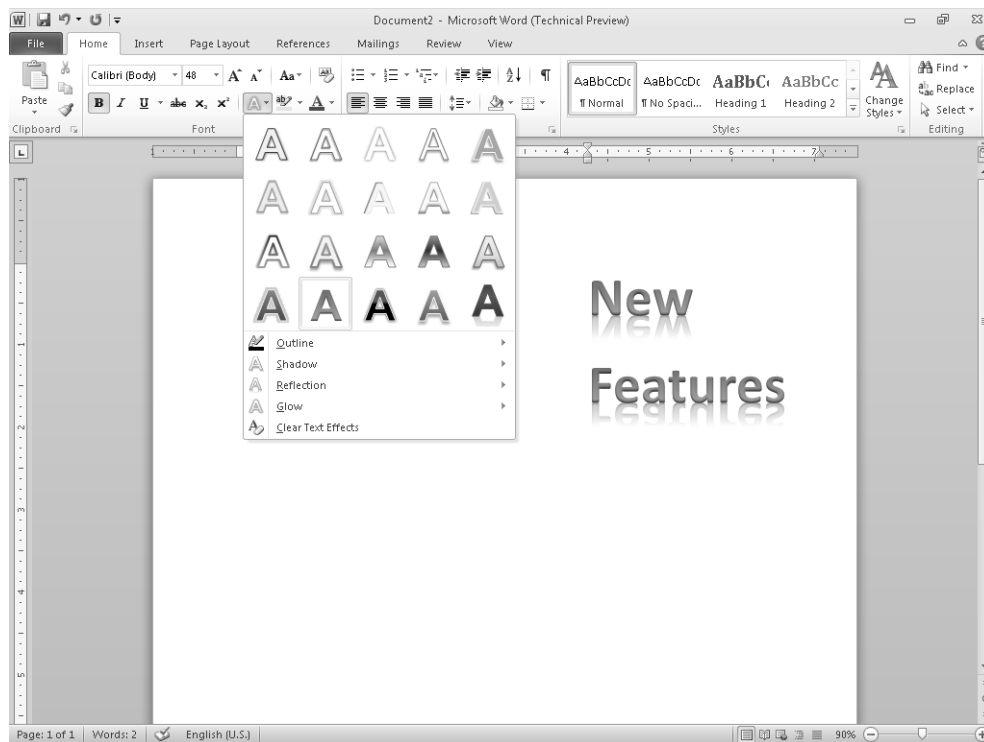

FIGURE 4-6 Text effects give you the tools to format headlines and text elements to make them stand out.

Tip   Even after you've applied a special effect to your text, you can continue to modify the look by making additional choices in the Text Effects list. You might change the bevel style of the letters, for example, or add a glow to specially formatted text.

Preserve Your Format Using Paste with Live Preview

How often do you copy and paste something in the documents you create? Microsoft research shows that Copy and Paste are two of the most often-used features in Word 2010; users might copy and paste as many as 300 times per month. Both procedures are simple, requiring only that you select the item you want to copy, click Copy on the Home tab, put the cursor where you want the item, and click Paste. Simple, right?

The challenge was that pasting the text or object sometimes had unexpected results, depending on where users pasted the item and what type of item was being inserted in the document. In fact, users undo paste operations more than any other in Office 2010. To answer this challenge and provide consistently what users expect, Copy and Paste have been improved in Word 2010. Now more than 400 clipboard formats are supported to make copying and pasting as easy and as reliable as possible while you're working on your documents.

Step by Step: Pasting Content Your Way

Use Paste with Live Preview to get just the paste results you want.

The variety of paste formats and the flexibility Word 2010 offers you when you paste text and objects in your document results in more reliable formats and less tweaking after the fact. And that means better efficiency and reliable results. Nice!

This example shows you how to use Paste with Live Preview so that you can get the results you want when you paste content in your Word 2010 document:

1. With your document open on the screen, highlight and copy the text or object you want to paste. Click Copy in the Clipboard group of the Home tab or press Ctrl+C.

2. Click at the point in your document where you want to paste the copied item.

3. Click the Paste arrow in the Clipboard group of the Home tab. A Paste Options gallery appears as you see here:
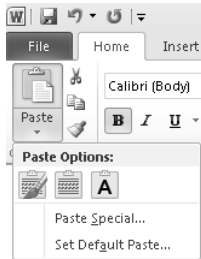
4. Point to each Paste icon to see a live preview of the way the item will appear in your document.

5. Click your choice. The item is pasted in the document as you selected.

You can also display the Paste Options gallery by right-clicking in the document at the point you want to paste the copied information. After you paste the content, Paste Options are displayed near the paste location in case you want to make a change:
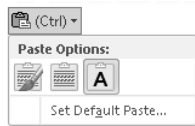
Tip Paste with Live Preview is available in all Office 2010 applications, and the selections displayed under Paste Options in the gallery vary depending on the type of content you have copied to the Clipboard. To display the Office 2010 Clipboard, click the dialog launcher in the lower right corner of the Clipboard group in the Home tab.

Illustrate Your Ideas

With Word 2010, you don't need to switch back and forth between software programs to include professional-quality images in your documents. Using Word's illustration features, you can easily apply special artistic filters to your photos or capture screen shots to include in your documents.

Apply Artistic Effects

The Artistic Effects in Word 2010 give you a variety of filters you can apply to your images to produce a wide range of special effects. For example, you might apply the Pencil Sketch effect to convert an image to an artistic black-and-white rendering, or use the Paint Brush effect to create a dramatic image of a new product.

To apply an artistic effect, simply select the image in the document you want to modify. The Picture Tools contextual tab is available. Click Artistic Effects in the Adjust group. (See Figure 4-7.) Preview the different effects by pointing to the effect you want to see; the image is displayed with that particular effect. Click the one you want, and it is applied to the image.

> **Tip** Office 2010 offers enhancements to SmartArt in Word 2010, Excel 2010, and PowerPoint 2010. Learn about SmartArt's new features in Chapter 5, "Create Smart Data Insights with Excel 2010."
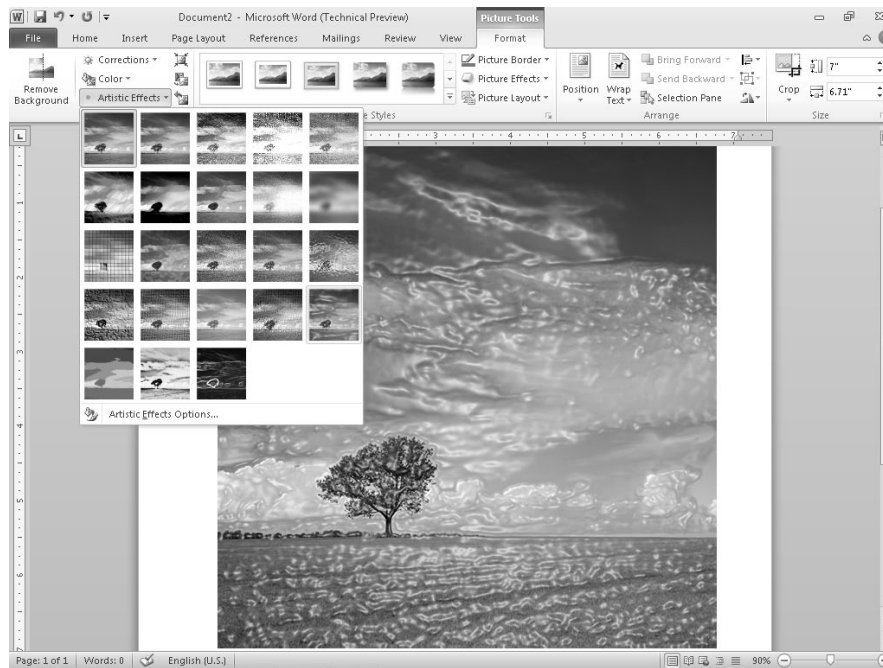

FIGURE 4-7 Artistic effects enable you to apply a variety of special filters to the figures in a document.

Insert Screen Shots

Adding pictures of your screen can come in handy when you are preparing team documents, sharing procedures with others, or writing a process to let others know how to work with a specific document. No matter what you might want to capture on the screen, Word 2010 makes it easy for you to grab the parts you need and include them in your document.

When you click the new Screenshot tool, available in the Illustrations group of the Insert tab, a gallery of screen-shot options appears. (See Figure 4-8.) The images in the gallery are thumbnails of the various applications you currently have active on your system. To choose one of the screen shots, click it; the image is added at the cursor position in your document.
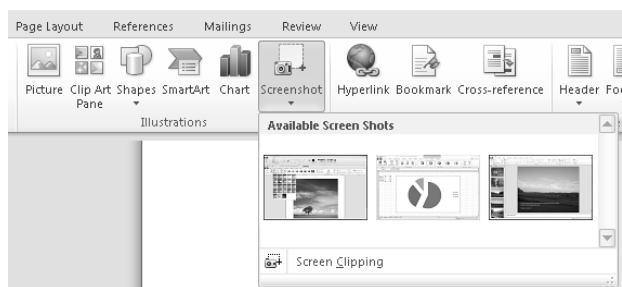

FIGURE 4-8 You can insert a screen shot of any window currently open on your system.

Step by Step: Adding a Screen Clipping

Grab just the portion of the screen you want to include in your Word 2010 document.

Suppose that you want to quickly clip a segment of a worksheet to include in the report you're writing. You can grab a screen shot of the worksheet and add it to your document by following these steps:

1. Open the document in which you want to add the screen shot, and click where you want to insert the screen shot.

2. Open the worksheet you want to use for the screen shot.

3. Display the document again, and click the Insert tab. In the Illustrations group, click the Screenshot arrow and choose Screenshot Clipping.

4. The worksheet automatically displays. Click in the upper left corner of the area you want to clip, and drag across the area to be included.

5. When you release the mouse button, the area is clipped and inserted in the document at the cursor position.
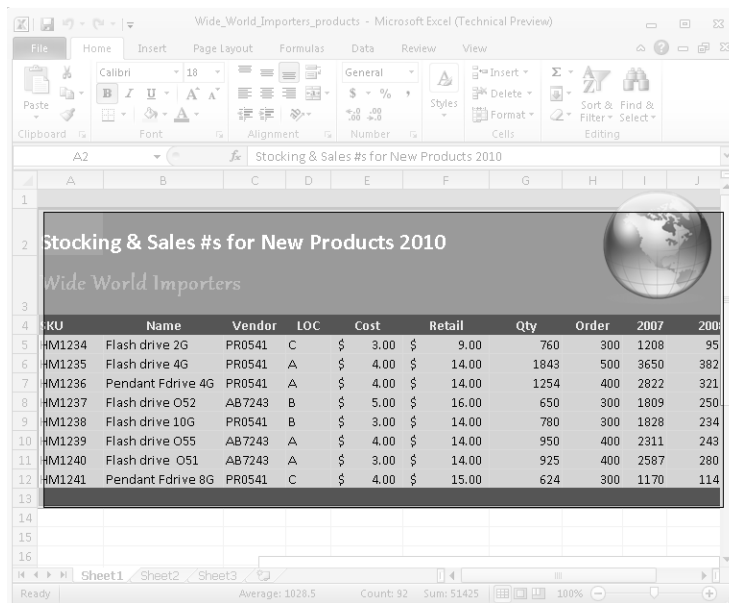
Improve Your Text

The Word 2010 Spell Check is smarter than ever; now it takes context into account as it checks your document. And the Word 2010 language tools make it easy to translate on the fly when you work with colleagues around the world.

Catch More Than Typos with a Contextual Spell Check

Have you ever received a document that was spelled right but included words that were used incorrectly? Words such as *their* and *there* or *seen* and *scene* can easily be misused in a document, causing a disconnect for your readers and clouding your message. The Word 2010 enhanced spelling checker now evaluates the words you use for the context in which they appear, which helps you ensure that your documents are as correct as possible.

> **Tip** You can have Word 2010 check for grammar and style in your document, which includes searching for punctuation, usage, clichés, gender-specific words, and more. To change the grammar settings, click the File tab and then Word Options, click Proofing, and then click the Settings button in the Writing Style area.

Start Spell Check by clicking the Review tab and clicking Spelling & Grammar in the Proofing group. The Spelling & Grammar dialog box shows you one by one any issues that the checker discovers so that you can enter changes as you go. The Dictionary Language setting enables you to look up the word in another language to see whether the usage or spelling is correct. (See Figure 4-9.)
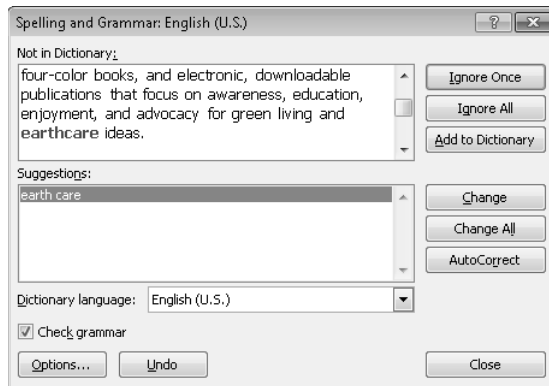

FIGURE 4-9 Now you can check the spelling and usage of words and phrases in dictionaries from other languages.

> **Tip** If your spelling checker doesn't seem to be working properly in Word 2010, make sure you've set your default language and that Spell Check isn't disabled. Here's how: On the Review tab, click Language in the Language group and choose Set Proofing Language. In the Language dialog box, click your primary language and choose Set As Default. When prompted, click Yes. Now make sure the Do Not Check Spelling Or Grammar check box is clear. If a check mark appears, click the option to clear the box; then click OK.

Use Language Tools, and Translate on the Fly

Many people now work in teams that span not only cities but continents. When you are working with peers in Europe, Asia, or other continents, language differences can present challenges. Word 2010 now includes enhanced language features that help you stay in sync with the global workplace. Now you can translate words and phrases on the fly, and develop documents that offer ScreenTips and Help in a variety of languages.

Translating in Real Time

Another language feature in Word 2010 enables you to translate text easily as you work in a document. Using the Translation Language tools, you can choose to show side-by-side translations, display the full document in a Web-based translated view, or use the Mini Translator toolbar to translate words as you go.

Setting up the translation tools is simple. In the Language group of the Review tab, click Translate. A list offers you four choices:

- Translate Document
- Translate Selected Text
- Mini Translator
- Choose Your Translation Language

Start with the last item first if this is the first time you're using the Translation tools. When you click Choose Your Translation Language, the Translation Language Options dialog box appears so that you can choose the language you're translating *from* as well as the language you're translating *to*. (See Figure 4-10.) Click your choice for each option on the Translate Document tab; then choose the language you're translating *to* on the Mini Translator tab. Finally, click OK to save your settings.
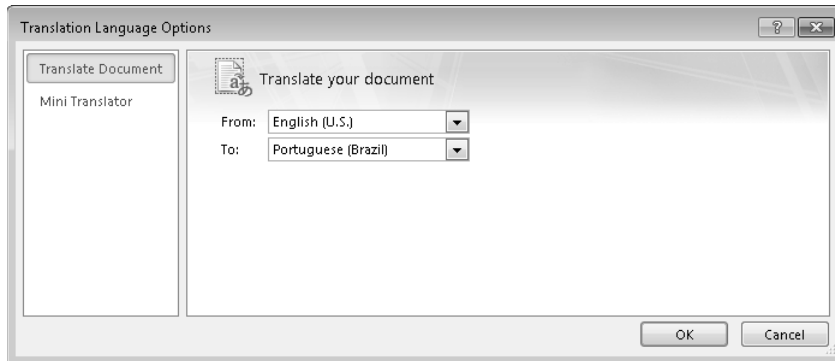

FIGURE 4-10 Set your translation languages using the Translation Language Options dialog box.

When you choose Translate Document, a dialog box appears alerting you that the document will be translated by the Web site WorldLingo and displayed in your browser online. To continue the operation, click Send and your document is translated and displayed in your Web browser window.

To translate a specific phrase or paragraph, begin by highlighting the text you want to translate; then click Translate and choose Translate Selected Text. The Research pane appears on the right side of your document window, and the text you selected is translated, according

to the language you selected. You can modify the settings by choosing new options in the Research pane.

Finally, to translate words and phrases on the fly, you can use the Mini Translator tool. This convenient little toolbar enables you to translate text as you go by simply hovering the mouse over the word you want to translate. (See Figure 4-11.) This can help you review text quickly and double-check your translations.

FIGURE 4-11 The Mini Translator enables you to translate words, phrases, or blocks of text as you work.

> **Tip** The Mini Translator tool also includes an audio feature that will read back the text you se-
> lect in your document. Simply highlight the text you want to hear, choose Mini Translator in the
> Translate list, and click the Play button on the Translator tool.

Co-Author and Share Documents

Word 2010 makes it easy for you to work collaboratively with others whether they work down the hall or on the other side of the world. Co-authoring features in Word 2010 make it possible for multiple authors to work on a file at the same time and contact each other in the process. And using SharePoint Workspace 2010 or Windows Live, you can save to an online workspace, communicate with coauthors, and keep track of changes in the file with-out e-mailing multiple documents back and forth or running the risk of overwriting changes another person on your team has made.

The co-authoring capabilities require SharePoint Foundation Services (for business clients) or Windows Live (for personal use). When you post a document to your SharePoint Workspace or Windows Live SkyDrive space and invite another author to share it with you, you will be able to see indicators in the document when the other author makes changes. (See Figure 4-12.) At each point the author makes changes, you see the author's name and a presence indicator that shows you the author's online availability.
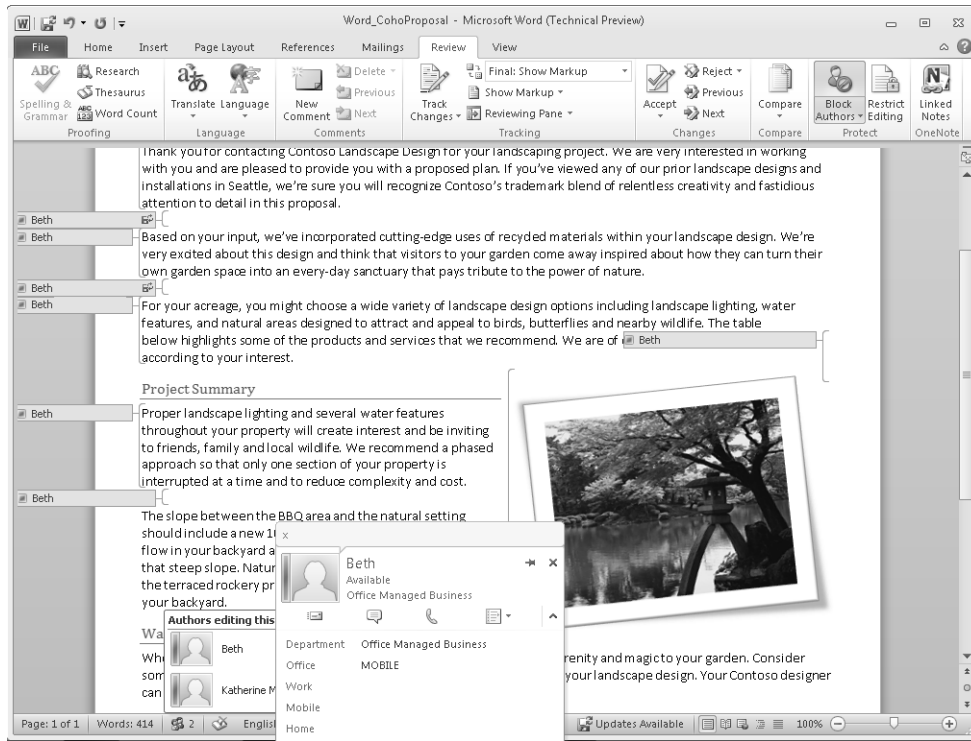
FIGURE 4-12 When you co-author a Word 2010 document, you can see who else is working on your shared document at the same time.

Tip The instant messaging, presence, and voice call features require Office Communicator 2007 R2 and Office Communicator Server 2007 R2, Windows Live Messenger, or another instant-messaging program that works with IMessenger.

Overview: Introducing Presence

Presence technology is all about being able to reach team members whenever they are present online. In Office 2010 Presence is available for systems running Microsoft Office Communicator 2007 R2, enabling you to see at a glance which of your coauthors are available online to answer questions, chat about your project, or talk about next steps.
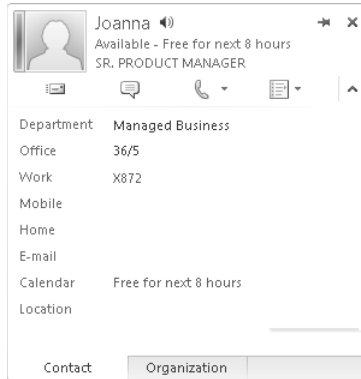
Office 2010 applications that support presence display a small green icon beside a person's name in a status bar list when they are available for contact. When you hover the mouse over the person's name, a pop-up list of options for contact appears. You can send an instant message, open a chat window, compose an e-mail message, or initiate a phone call by clicking one of the communication options. You can also click the menu to display the contact's full contact information and discover additional ways of making contact.

Working with Shared Documents

You can easily add authors to documents you're working on and share files using SharePoint Workspace 2010 or Windows Live SkyDrive. You first post the files you want to share and invite authors to the SharePoint workspace or SkyDrive folder. Once you begin working with the shared document, Backstage view gives you information about the shared file, as you see in Figure 4-13.

Shared workspace
where the file is stored

Save status of the file

Click to send
a message
to a coauthor

Authors currently
working in the file

Notes added
to the file

Click to see other documents
in the shared workspace
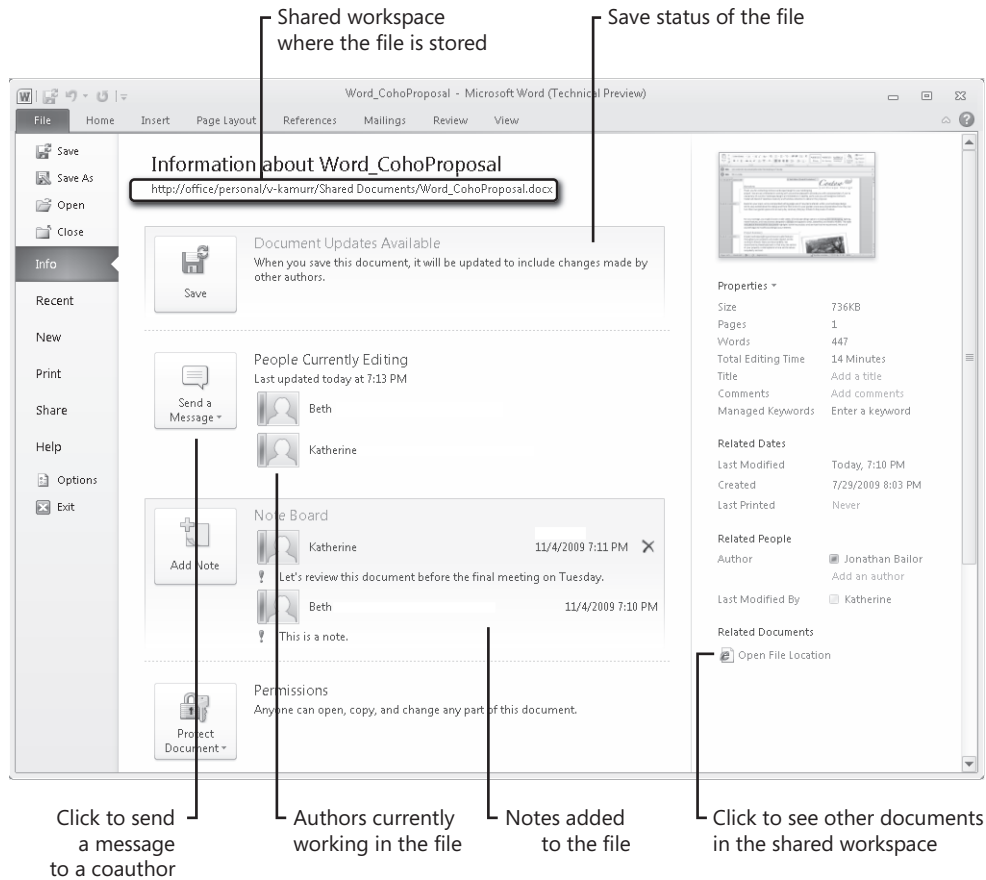
FIGURE 4-13 You can add the names of coauthors in Backstage view and check documents stored in the shared workspace for the current file.

Access Your Documents Anywhere

Picture this: You are rushing out the door to get to a meeting uptown. You had hoped to put the finishing touches on the client report you need to share with the team, but because your afternoon meeting ran long you were unable to finish it. Now you're on the train and have a few minutes to spare. Luckily, you can access Word 2010 on the Web and wrap up those last few details.

Use Word Web 2010

By logging into Windows Live, accessing your SkyDrive folders, and opening a Word 2010 document you've posted there, you can access the familiar Word 2010 tools and features so that you can complete your document on time. Log in to your account, choose SkyDrive (in the More menu), and open your My Documents folder; then click the document you want to work with. Click View to open the file. In the Word Web App window, you can simply re-view the file (if you don't want to make any changes). Figure 4-14 shows the Word Web App window.
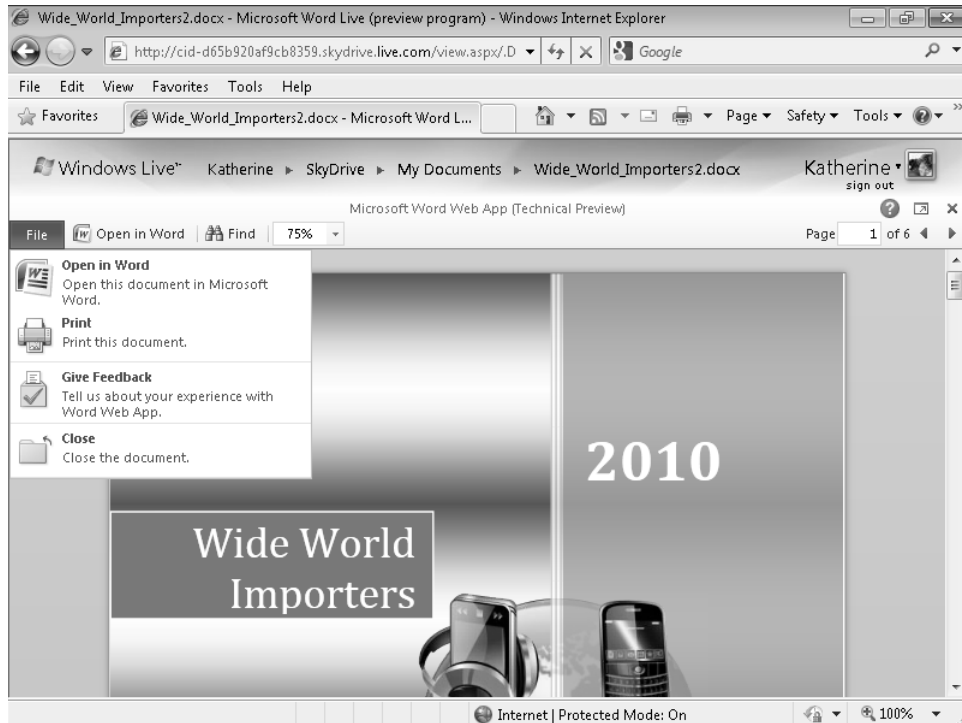
FIGURE 4-14 You can review the document, do light editing to it, and even print it from the Web.

If you click Open in Word, the Word Web App will ask for your Windows Live login informa-tion. After you provide it, the document opens in Protected view. (Protected view is always used when a file is downloaded from an Internet location.) Click Enable Editing to activate editing mode, and the document opens in Word 2010. When you save the document, the changes you made are synchronized with the online document with no further action from you.

Check Your Document with Word Mobile 2010

Need to take a quick look at a customer document before that important meeting? Or perhaps you want to sign off on a report so that others on your team can share it right away. With Word Mobile 2010, you can use the familiar Word 2010 experience to display and search your document, make simple changes, and save and finalize the file.

With Word Mobile, you can easily open, view, edit, and copy and paste information in your Word documents—using your smartphone. Spell Check and AutoCorrect are available to help you make sure your edits are accurate.

The document formatting—even in tables, charts, and graphics—will be preserved on your phone display, thanks to Office Mobile's Text Reflow technology. You can use all the familiar formatting basics—bullets, numbering, fonts, paragraph formats, and more.

You can also send your document from your smartphone by e-mail to a friend or colleague or post it to your SharePoint workspace.

Word Mobile 2010 is not part of Office 2010, but the software will be available at the release of Office 2010 for phones using Windows Mobile 6.5 or later.

Chapter 5
Create Smart Data Insights with Excel 2010

In this chapter:

- Start Out with Excel 2010

- Summarize Your Data Easily

- Illustrate Information Effectively

- Show PivotTable Data Your Way

- Work Anywhere with Excel 2010

Helping others understand the information you present—whether you work with words, numbers, pictures, or media—is a key part of success in any business environment. The big story in Microsoft Excel 2010 includes new features that help you convey your findings in ways others can easily understand. Sparklines are small, cell-sized charts you can add to your worksheet to provide a visual summary of the data in selected ranges; new icon sets and improvements to data visualization options give you greater variety in the way you present information; SmartArt and charting enhancements offer additional flexibility; and slicers enable you to graphically slice-and-dice your PivotTable to display just the information you want to show at any given time.

And Excel 2010 also includes new offerings for the high-end spreadsheet user: new formulas, support for spreadsheets with millions (yes, *millions*) of rows, and the integration of SharePoint 2010 and Excel Services, which enables you to publish worksheets and dashboards to your intranet or to the Web. This chapter touches on the top new features in Excel 2010 and encourages you to give a few of them a try.

Start Out with Excel 2010

The Excel 2010 window offers you an open, visually inviting workspace that presents everything you need to work with multiple worksheets, enter formulas and cell values, and change the way you view information on the screen. Figure 5-1 introduces you to the various elements in the Excel 2010 window.
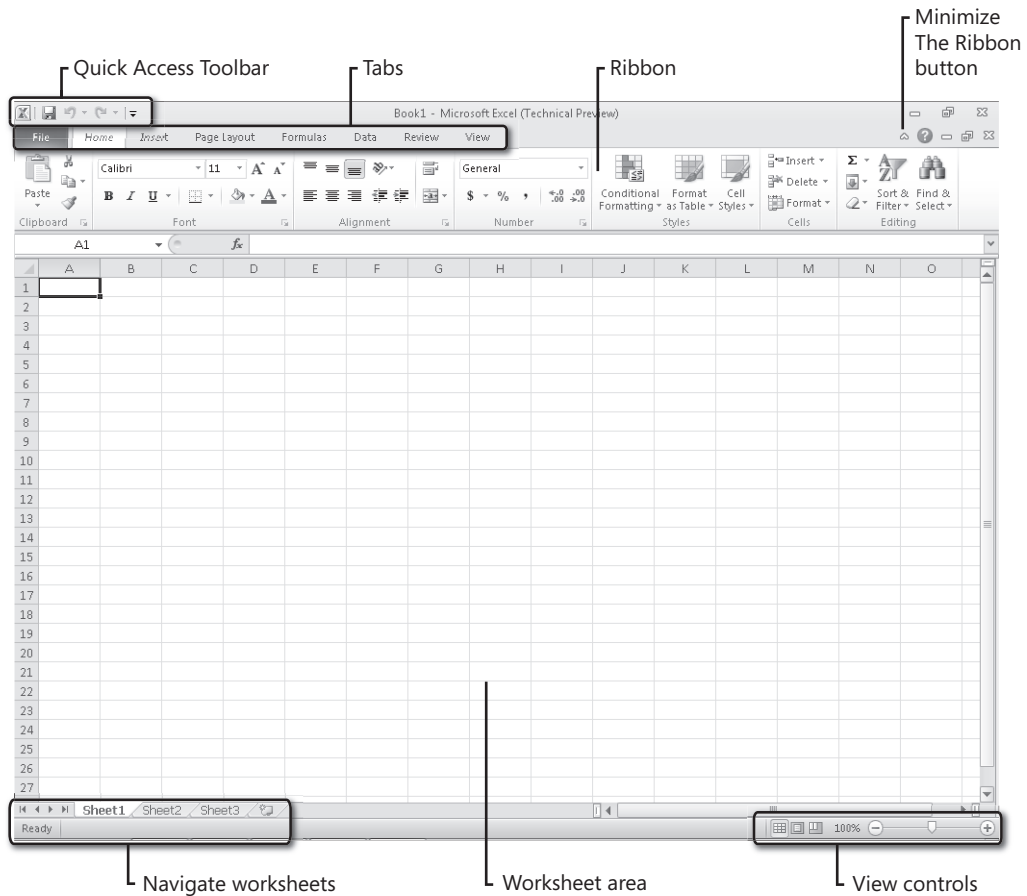
FIGURE 5-1 The Excel 2010 workspace gives you plenty of room onscreen while providing the tools you need.

Tip You can hide the display of the Ribbon to maximize your space onscreen by clicking the Minimize The Ribbon button in the upper right area of the Excel 2010 window.

The Office 2010 Ribbon includes eight tabs, each with groups of tools related to a specific focus: File, Home, Insert, Page Layout, Formulas, Data, Review, and View. For example, to add a SmartArt diagram to the current worksheet, you click the Insert tab and choose SmartArt in the Illustrations group. A group of SmartArt tools appears in the Ribbon in a contextual tab to provide the tools you need for creating and customizing SmartArt. (See Figure 5-2.)

You'll find many of the new tools and enhancements in Excel 2010 on the Insert tab. Specifically, the Screenshot tool in the Illustrations group, the Sparklines group, and the Slicer tool in the Filter group are all new. The following sections introduce you to these features in more detail.
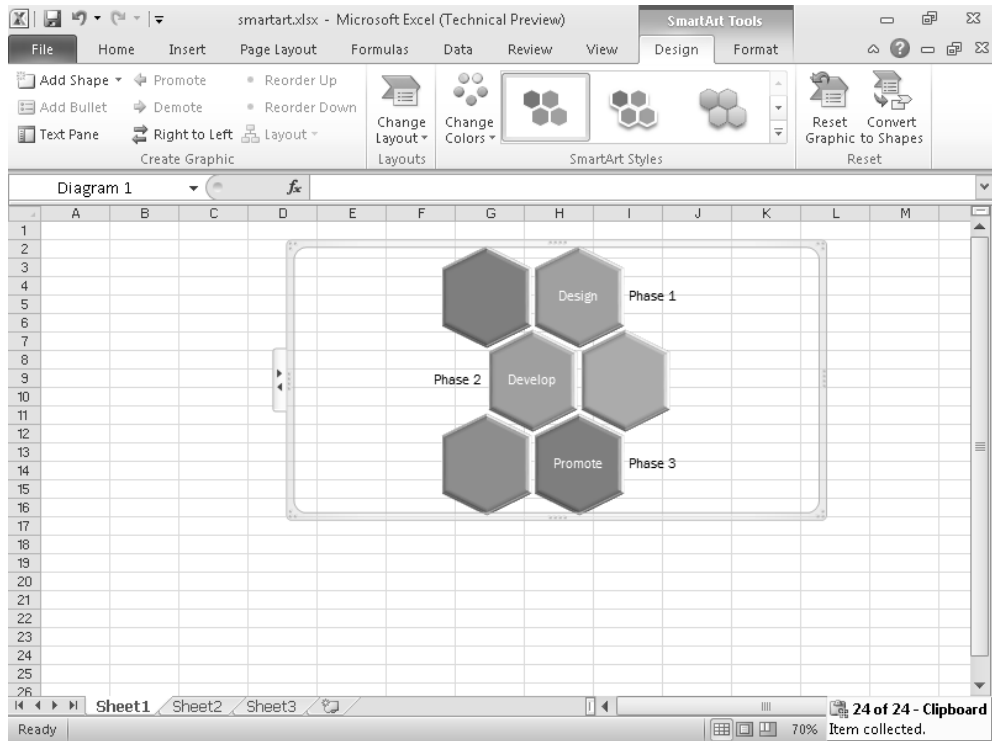
FIGURE 5-2 Contextual tabs display tools you need only when you are working with a specific item on your worksheet.

Summarize Your Data Easily

Your worksheets enable you to organize, track, and calculate financial information over time. An important part of making sense of the data you gather—and sharing what you find—involves communicating the results in a way others can easily understand. Sparklines are small, cell-sized charts that appear within your worksheet, giving readers a quick picture of what the numbers on the worksheet mean. Because sparklines stay with your data (unlike a chart, which might appear in a section of the worksheet some distance from the data it reflects), they show clearly the relationship among the data values used to create them.

You can create three kinds of sparklines in Excel 2010. The program offers you the choice of line, column, or win/loss sparklines:

- Line sparklines show trends and changes in values over time.

- Column sparklines enable you to compare values.

- Win/loss sparklines enable you to analyze values in relation to a norm.

## Step by Step: Add Sparklines to Your Worksheet

Here's how to summarize your data easily with sparklines.

You can add sparklines at any point in your worksheet where you want to show data trends, comparisons, or summaries. Here are the steps to add sparklines and customize them to meet your needs:

1. Open a worksheet or create a new worksheet in Excel 2010. If you are creating a new worksheet, enter the data you want to use as the basis for the sparklines.

2. Click and drag to select the cells that include the data you want to show in the sparkline.

3. Click the Insert tab, and click the type of sparkline you'd like to create: Line, Column, or Win/Loss.

4. The Create Sparklines dialog box shows the range of cells you selected in the top data field.
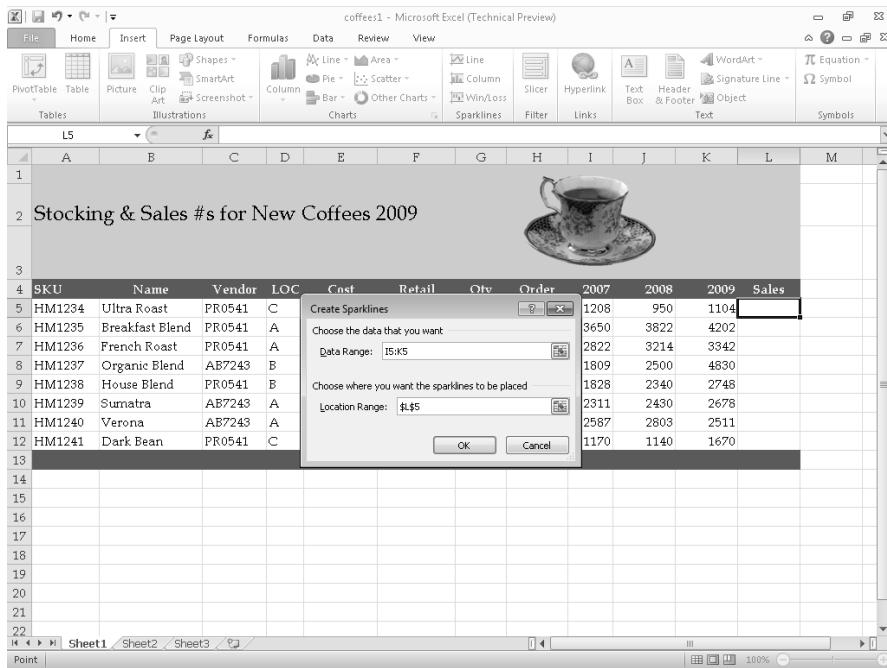
5. Click in the Location Range field of the Create Sparklines dialog box, and then click the cell on the worksheet where you want the sparkline to appear.

6. Click OK. The sparkline is added to the document.

7. Click the elements in the Show/Hide group of the Sparkline Tools Design tab to customize the appearance of the sparkline you added. As you click your choices, new points are added to the examples in the Style gallery, as shown here:

8. Click the Sparkline Color arrow to display the palette and set the color of the sparkline.

9. Click the Marker Color arrow to choose the color of the markers displayed on the sparkline.

10. After you set the sparkline formatting options as you want them, you can copy and paste the sparklines to other cells in the worksheet. Excel will update the references to show the correct sparkline representation in the cell.

Note The formatting options for sparklines are group-based, which means that making changes to one sparkline changes the format of all sparklines in the series. To change an individual sparkline (for example, to make the color of one sparkline stand out), remove it from the group by clicking it and choosing Ungroup in the Group area of the Sparkline Tools tab.

Tip To delete an unwanted sparkline from the worksheet, click the sparkline, click Clear, and then click Clear Selected Sparklines in the Group area of the Sparkline Tools tab.

Illustrate Information Effectively

Especially when they are reviewing large worksheets, people who are unfamiliar with the data you're presenting might not be drawn instantly to the key points you want them to understand. To help you spotlight important data elements on your worksheets, Excel 2010 includes a number of conditional formatting features. Here are a few of the elements that draw readers' attention to important data and help communicate what the data represents:

- Icon sets display small icons in data cells that spotlight high, mid, and low values, for example.

- Data bars enable you to show how values in a range of cells compare with one another.

Call Attention to Your Data with Icon Sets

When you want to call attention to a specific range of cells in your worksheet, consider using icon sets to do it. Icon sets are small pictures that appear with the data in a cell to help the reader evaluate what the value means. For example, a cell showing a low sales value might display a red flag, while a cell showing a top sales value could display a green flag.

Excel 2010 includes a number of new features that enhance the capabilities of icon sets. New icon sets include new ratings sets, such as stars and boxes, and you can customize the formatting and display choices for icon sets so that you can create exactly the display you want.

Step by Step: Use Improved Icon Sets to Highlight Data

You can spotlight key data values easily with icon sets.

Excel 2010 includes 20 icon sets in four categories: Directional, Shapes, Indicators, and Ratings. Now you can easily format and customize the icon sets so that they show those viewing your worksheet what's most important and why. Data bars now show gradients relative to the values they display, and you can show both positive and negative values in data bars. In short, you have more control over the visualizations you choose for your worksheet data. Follow these steps to use an icon set to display worksheet values:

1. Open the Excel worksheet you want to use.

2. Select the individual cell or range of cells where you want to add icon sets.

3. Click Conditional Formatting in the Styles group of the Home tab.

4. Click Icon Sets, and a list of icon sets appears, as you can see here:
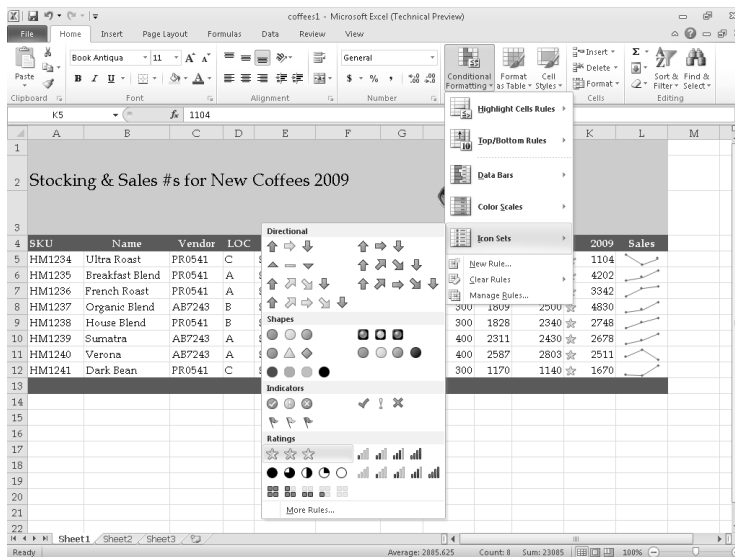
5. Click the icon set you want to apply to the selected cells.

6. To customize the icon set, select the cells, click Conditional Formatting in the Styles group of the Home tab, and click Manage Rules.

7. In the Conditional Formatting Rules Manager, click Edit Rule. The Edit Formatting Rule dialog box appears, as shown here:
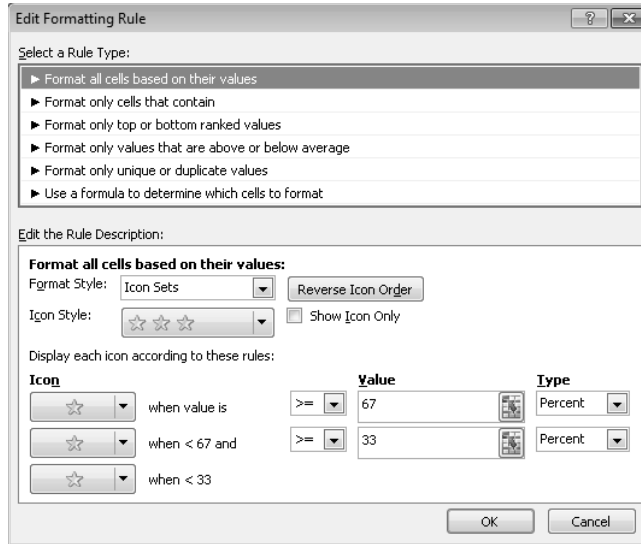
8. You can change the display of an individual icon by clicking the down arrow to the right of the icon you want to change and choosing a new icon.

9. Change the range of values represented by the icon by changing the Value and Type settings for each icon.

10. Click OK to save your changes. The worksheet displays updates automatically.

Tip You can do much more with icon sets in Excel 2010. To learn more about the different ways you can spotlight the data on your worksheets, see *Microsoft Office 2010 Plain and Simple* by Jerry Joyce and Marianne Moon (Microsoft Press, 2010).

Data Bar Improvements

Data bars offer another type of conditional formatting element in Excel 2010 that help you analyze data values in a range of cells. Enhancements to data bars make it possible for you to include negative values and apply formats that make the data bars easier to understand. (See Figure 5-3.)

FIGURE 5-3 Now in Excel 2010 you can add data bars that reflect negative as well as positive values.

Step by Step: Compare and Analyze Values with Data Bars

Data bars help you show at a glance how key data values compare to one another. You can use data bars to display a range of values that can include both positive and negative numbers.

1. Select the range of cells where you want to add data bars.

2. Click Conditional Formatting in the Styles group of the Home tab.

3. Click Data Bars to display the list of data bar styles you can apply to the selected cells, as shown here. As you point to each data bar style, the selected range previews the choice. Click the style you want to apply.
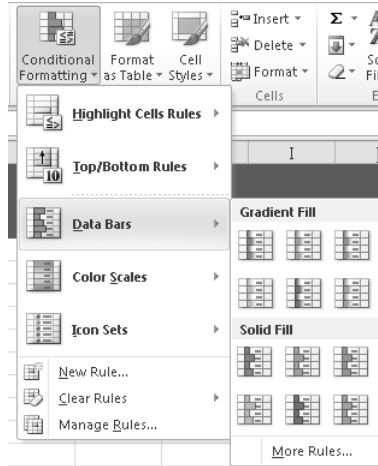
4. Add negative value capability by clicking Conditional Formatting again and choosing Manage Rules.

5. In the Conditional Formatting Rules Manager, click Edit Rule. In the Edit Formatting Rule dialog box, click the Negative Value And Axis button.

6. In the Negative Value And Axis Settings dialog box, select the fill color and axis settings you want to apply to the negative value display. You can also set the axis color.

7. Click OK to apply your changes. The data bars appear in the selected cells, showing any negative values as you selected.

Tip You can change the way the data bars appear in your cells by choosing either gradient or solid fills. Additionally, you can customize the way the fills and borders look to create the best look for the data displayed on your worksheet.

New SmartArt Enhancements

SmartArt diagrams give you a simple way to add professional diagrams to your worksheets, documents, and presentations. Whether you need to create an image that links product descriptions to the values on your worksheet, spotlights key initiatives your data reflects, or helps new hires learn your sales tracking process, you can use SmartArt to organize and depict your thoughts easily and effectively.

Excel 2010 adds a new set of SmartArt graphics to the mix, enabling you to choose from additional layout styles and incorporate pictures easily in the diagrams you add to your worksheet. Now expanded support for text gives you more flexibility for the descriptions you provide so that you can let the image further explain the connections between worksheet data and the images the diagram presents.

Use Slicers to Show Data Your Way

Using Excel 2010 you can track, analyze, and report on the information you gather about your organization. Displaying the data you need and making decisions based on the insights you gather is an important part of working effectively in Excel. Excel 2010 includes a new feature called *slicers*, which enable you to slice your data easily and include only the elements you want in the PivotTables and PivotCharts you create. Using slicers, you can easily add and remove elements from the table display, which helps you compare and evaluate data from different perspectives. What's more, you can use the slicers you create with multiple PivotTables and PivotCharts to showcase your data consistently in a variety of scenarios.

Step by Step: Use Slicers to Segment Data Display

Use these visual controls to move data elements in and out of your PivotTable display.

1. First create the PivotTable you want to use with the slicer you create.

2. Click the PivotTable to select it.

3. Click the Insert tab, and click Slicer in the Filter group.

4. In the Insert Slicers list box, click the field you want to use to slice the PivotTable data. In the example shown here, Cost is used to select a specific data value to display.

5. Click OK. The slicer appears on the worksheet.

Tip You can attach a slicer you create to another PivotTable connected to the current worksheet by clicking the slicer and choosing PivotTable Connections in the Slicer group of the Slicer Tool Options tab. Select the PivotTable to which you want to add the slicer and click OK.

> **Note** You can easily change the look of the slicers you add to your worksheet by clicking the Slicer Tool Options tab and changing the slicer caption, style colors and effects, button size and format, and overall size of the slicer window.

> **Tip** PowerPivot for Excel is a new add-in (previously called "Project Gemini") available with Excel 2010 that supports extremely large worksheets of up to 2 gigabytes (GBs). PowerPivot enables you to model and analyze data on worksheets that include literally millions of rows and to sort, filter, and use table lookup functions on multiple tables in Excel 2010.

Work Anywhere with Excel 2010

Chances are that the worksheets you create are changed, shared, and improved over time. Perhaps you start a draft and share it with your team, and each person takes responsibility for updating a specific section for the final version. When all the pieces are finished, you can review the finished version and save and distribute the file you've created. Along the way, you check on worksheet changes, make suggestions, answer questions, and add data visualizations, charts, and PivotTables that help showcase the results you want readers to understand. Using both Excel 2010 Web App and Excel Mobile 2010, you have the ability to view your worksheet from any point you have Web or phone access and make sure the worksheet is developing according to plan.

Excel 2010 Web App

Using the Excel 2010 Web App enables you to view your worksheet using SharePoint Workspace 2010 or Windows Live and work with your favorite tools and features to do light editing, review content, and work collaboratively. The Web window, shown in Figure 5-4, offers the consistent look and feel of the Excel 2010 interface and enables you to view, edit, open, format, recalculate, search, and refresh the data connections in your workbook.

> **Tip** In Excel 2010, Excel Services is integrated with SharePoint 2010, enabling you to share your analyses with others in your organization. If you have SharePoint Server 2010, you can share your worksheet in Excel Services by clicking the File tab, and, in Backstage view, clicking Share. Finally, choose Publish To Excel Services.

Excel Mobile 2010 has been designed specifically to give you a simple, intuitive interface even on your smartphone's small display. The fonts, bullet styles, and worksheet display make it simple for you to navigate your worksheets and find what you need easily. What's more, when you make changes to your worksheet using Excel 2010 Mobile, worksheet values are recalculated instantly—no syncing required.

With Excel Mobile, you can easily create, view, and recalculate your workbooks, and you can add charts as needed. The worksheet on your phone will support 140 different functions, so you won't trade processing power for flexibility when you're crunching numbers on the road.
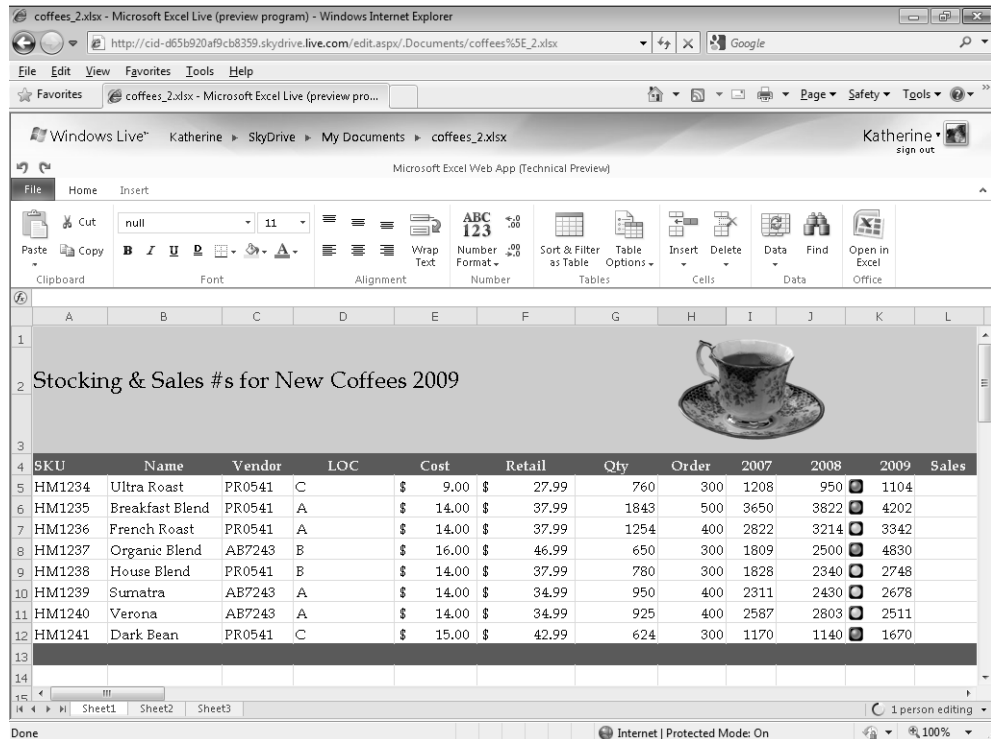

FIGURE 5-4 Excel Web App enables you to view, edit, format, and work collaboratively in your worksheet. Excel Mobile 2010.

Chapter 6
Manage Rich Communications with Outlook 2010

In this chapter:

- Starting Out with Outlook 2010

- Managing Your Conversations

- Cleaning Up Your Messages

- Streamlining E-mail Tasks

- Coordinating Calendars

- Improving the Look of Your Messages

- Keeping in Touch with Outlook Mobile

Communication is at the heart of everything you do. Whether you are finishing a report for others to review, posting a new document for human resources, wrapping up a presentation for the sales staff, or setting and scheduling appointments with clients, being able to stay in touch with key people is a vitally important part of your daily activities.

Today's computer user receives close to 100 e-mail messages a day, and that volume is steadily increasing. To manage so much e-mail effectively, you need to be able to separate the necessary messages from the unnecessary ones. Microsoft Outlook 2010 includes a number of new features that enable you to easily manage the messages you receive, track important conversations, and automate your common messaging tasks. What's more, you can stay up to date with all your friends and colleagues via social networks and communicate in real time using instant messaging—all within Outlook 2010. This chapter introduces you to the new features in Outlook 2010 that help you get control of your Inbox, communicate easily with your team, create and use group schedules, and access Outlook from your browser.

Starting Out with Outlook 2010

The Outlook 2010 window gives you all the tools you need for managing e-mail and working with calendars, contacts, and tasks. The work area is divided into five separate panes (as described in the following list and shown in Figure 6-1), each providing you with a different way to work with the information you see:

- The Navigation Pane enables you to choose what you want to do. The top of the pane displays favorite folders, the center shows all active folders in Outlook 2010, and the bottom area enables you to choose the view you want to see.

- The Inbox (in Mail view) lists the e-mail messages you receive, arranged according to your selection.

- The Reading Pane enables you to read the selected e-mail message without opening it.

- The To-Do Bar lists the calendar of the current month, appointments for the current week, and your upcoming tasks.

- The People Pane shows you any social media information available for the person sending the current message, and it lists files, appointments, and notes related to that person.
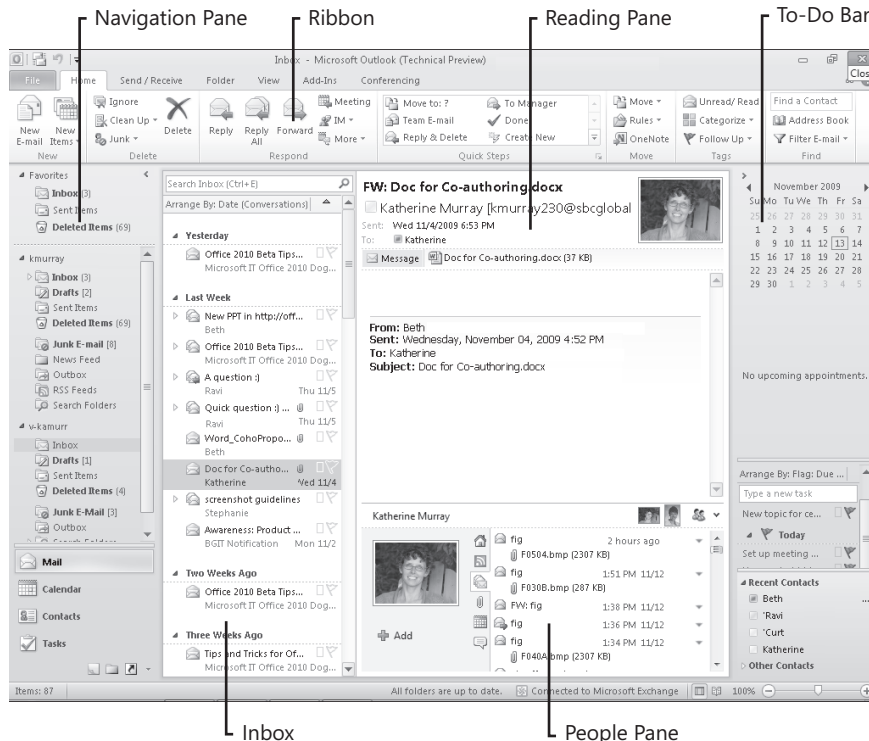

FIGURE 6-1 The Outlook 2010 window provides you with different ways to work with messages, appointments, and tasks.

Using the Outlook 2010 Ribbon

Outlook 2010 includes the familiar Ribbon, designed to give you just the tools you need for the type of operation you're performing. The Ribbon offers seven tabs (File, Home, Send/ Receive, Folder, View, Add-Ins, and Conferencing), giving you specific tools to manage the volume of messages, tasks, and appointments you create and receive. The Ribbon display changes based on the view you display. For example, Figure 6-2 shows the Home tab when Calendar view is active.
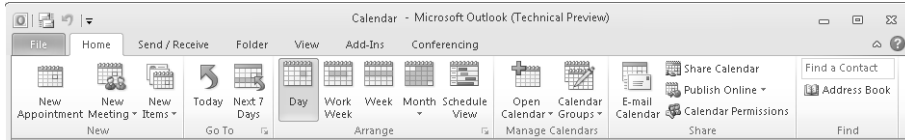
FIGURE 6-2 The Calendar view Home tab includes groups and tools for creating arranging, managing, and sharing calendars.

> **Tip** In Outlook 2010, you can easily customize the Ribbon to add new groups or organize tools so that they are available just the way you want them. Click File, choose Options, and click the Customize Ribbon category to change the way the Ribbon is displayed.

Setting Preferences with Backstage View

You'll also discover that Outlook 2010 shares Backstage view with the rest of Office 2010, enabling you to add new e-mail accounts; modify your account settings; set up automatic replies, rules, and alerts; and specify mailbox cleanup options. (See Figure 6-3.) Backstage view makes it easy for you to view and change settings for one or more e-mail accounts that you use with Outlook 2010.

> **Tip** Want to use Outlook 2010 for your various e-mail accounts? Display Backstage view, click Account Settings, and click Add Account to add your other communications connections (including text messaging services) to Outlook.

FIGURE 6-3 You can add e-mail accounts, set out-of-office replies, and more from Backstage view.
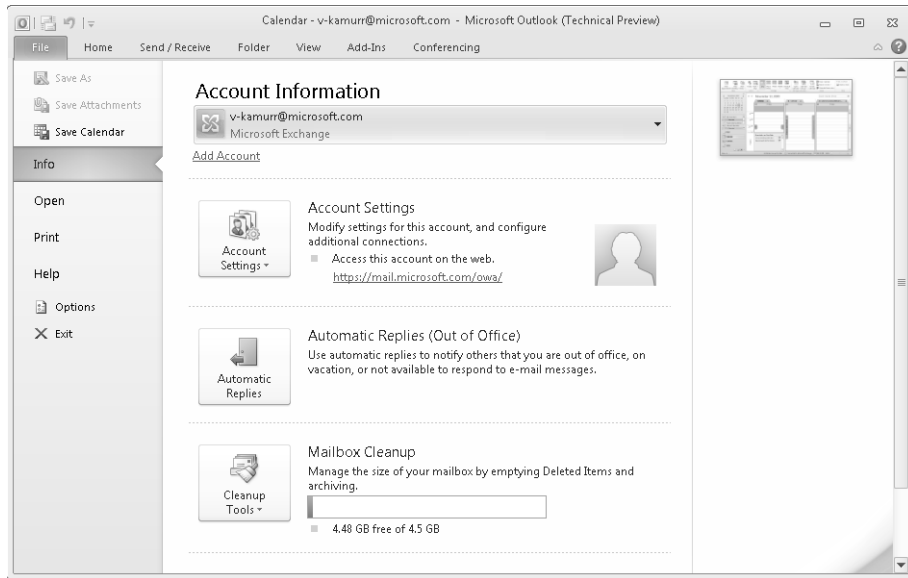
Managing Your Conversations

Conversation view is one of the big improvements in Outlook 2010, enabling you to see at a glance the important messages in a conversation thread. With Conversation view, you can stay on top of changing information, make decisions in a flash, and opt out of conversations that no longer require your input. In addition to gathering related messages in one convenient thread, Conversation view makes it easy for you to categorize, remove, or clean up the messages you don't need, which cuts down on the clutter in your Inbox.

When you open Outlook 2010, your messages are displayed in Conversation view by default, with the most recent messages first. The Reading Pane shows the first message in the selected conversation. (See Figure 6-4.)

In addition to viewing and responding to messages in Conversation view, you also can organize your conversations to streamline your message-management tasks. For example, you can choose the Move tool in the Actions group of the Home tab to tell Outlook to place the current conversation in a specific folder. When you choose the feature Always Move Messages In This Conversation, Outlook 2010 enables you to specify the destination folder so that all messages related to the current conversation are stored in that folder automatically.
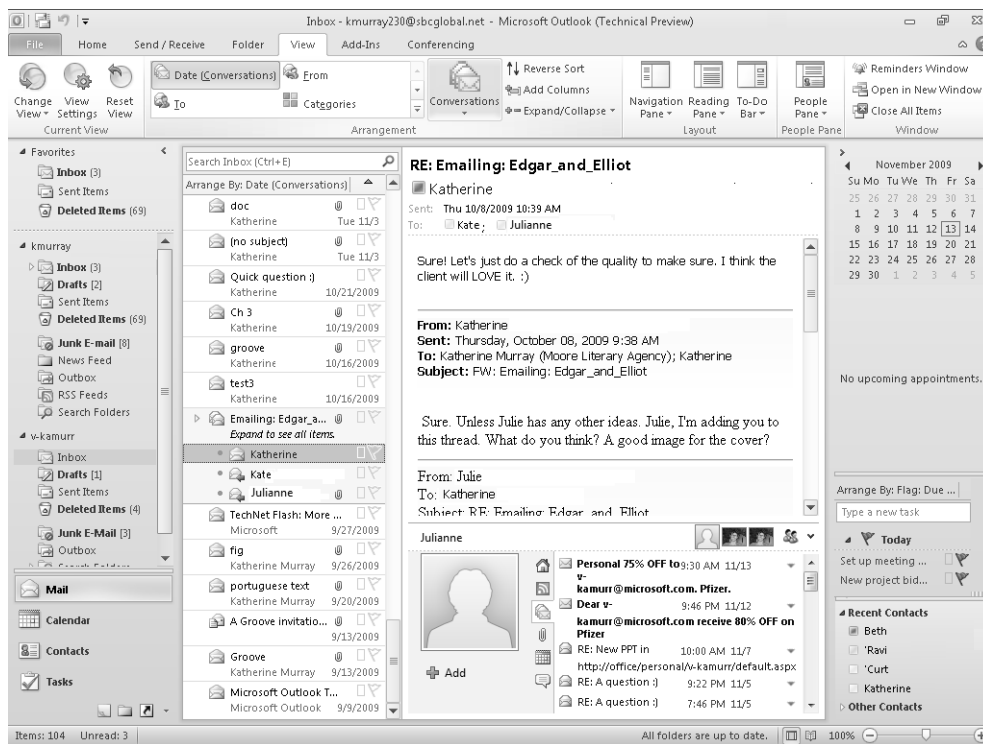
FIGURE 6-4 Use Conversation view to track conversations and bow out when they no longer require your attention.

Step by Step: Following E-mail Conversations

Follow these steps to use Conversation view in Outlook 2010:

1. When you first open Outlook 2010, Conversation view is displayed by default. If you have changed to another view, return to Conversation view by clicking the View tab and choosing Conversation in the Arrangement group.

2. In the Inbox area, click a conversation group you want to view. The group expands to show the messages most relevant to the conversation thread, as shown here:
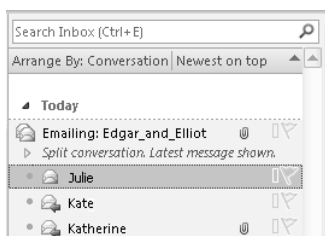
3. To display all messages in the thread, double-click the first message in the conversation. The list expands to show all the messages that have been sent in this thread.

After you've read the conversation, you might want to organize it in any of the following ways:

- Ignore further messages in this conversation by choosing Ignore in the Delete group of the Home tab

- Clean up the conversation and remove redundant messages by choosing Clean Up Conversation in the Clean Up selection of the Delete group (also in the Home tab)

- Move the conversation to a specific folder by clicking Move and choosing the selection you want in the Actions group on the Home tab.

Cleaning Up Your Messages

Many of the e-mail messages we receive on a daily basis are unnecessary, and yet because of the volume of messages we receive we might not organize or remove them as soon as we read them. Outlook 2010 provides the Clean Up command to help you remove redundant messages from your Inbox.

You will find the Clean Up tool in the Delete group of the Home tab. When you click the tool, you are given the option of cleaning up the current conversation, cleaning up a specific folder, or cleaning up the current folder and any subfolders it contains. Simply click the item you want and Outlook 2010 displays a message box telling you that any redundant messages removed will be placed in your Deleted Items folder. (See Figure 6-5.)
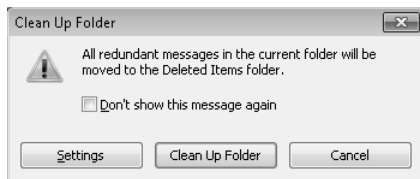

FIGURE 6-5 Outlook 2010 makes it easy for you to clean up conversations, folders, and subfolders and weed out unnecessary messages.

Streamlining E-mail Tasks

Most likely, you perform many of the basic Outlook tasks regularly: you check e-mail, respond to e-mail, set appointments, schedule tasks, and track contact information. For this reason, the designers of Outlook 2010 set out to save you time and streamline your tasks by giving you the ability to do those tasks with a single click. Using Quick Steps, you can perform common tasks with a single click of the mouse button. For example, you might forward a message to your manager, reply to a meeting, or send a team e-mail message with a single click.

By default, Outlook 2010 includes a set of 10 Quick Steps available in the Quick Steps group of the Home tab. (See Figure 6-6.) You can easily set up these Quick Steps to do what you need them to do or create your own Quick Steps based on other common e-mail tasks.

FIGURE 6-6 Quick Steps enable you to complete routine tasks with a single click of the mouse button.

Table 6-1 introduces you to each of the Quick Steps that come ready to use in Outlook 2010.

TABLE 6-1 Introducing Quick Steps

Quick Step	Description
Move to:?	Prompts you to choose a folder, and gives you the option of Move To Folder/Mark As Read
Forward: FYI	Forwards the selected message, and adds "FYI:" to the beginning of the subject line
Team E-Mail	Displays the Customize Quick Step window so that you can enter the e-mail addresses of teammates and set up the feature
Reply & Delete	Displays the Reply window, and deletes the existing message after you click Send
Create New	Enables you to create a new Quick Step
Meeting Reply	Sends a meeting response to the sender
To Manager	Automatically sends a message to your manager
Done	Moves the current message to a folder you specify, and marks the message as complete
Team Meeting	Creates a new meeting request for your team

Step by Step: Create a Custom Quick Step

Quick Steps were designed to simplify your common e-mail tasks. The following steps show you how to create a new Quick Step to fit your needs:

1. Enter a new name for the Quick Step.

2. In the Actions area, click the down arrow to the right of Choose An Action, and select the item you want to add from the displayed list, as shown here:
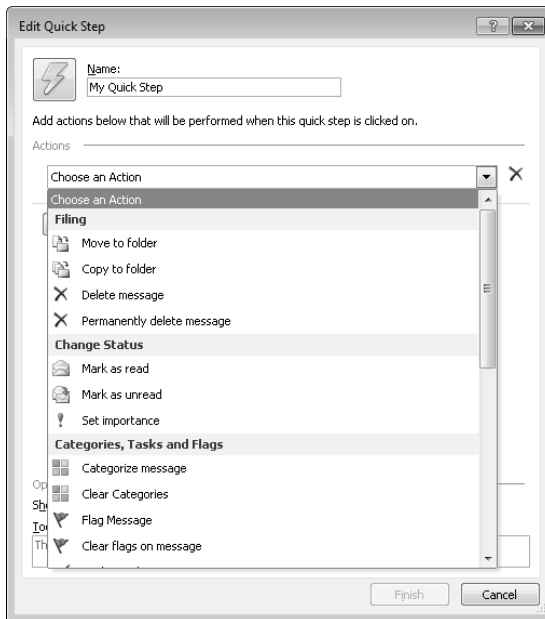
3. Click Add Action.

4. Click the Shortcut Key arrow, and choose a shortcut key from the list if you want to assign one.

5. Enter text to describe the action in the Tooltip Text text box.

6. Click Create.

Tip The Quick Contacts feature enables you to locate contacts quickly in Outlook 2010. In the Find group on the Home tab, simply click in the Find A Contact box and type the first few characters of the person's name. If you are using Office Communicator, a list of contacts that match the characters you typed appears toward the bottom of the To Do Bar. If you are not using Office Communicator, when you press Enter, the Choose Contacts message box appears, listing all contacts that match the characters. Choose the contact you want by clicking the name and clicking OK. The person's contact record is displayed so that you can review or modify it and save it.

Working with Presence and Social Media

When you are working collaboratively, being able to tell when teammates are online and available to answer a quick question is a definite plus. Outlook 2010 provides presence and status information for your contacts so that you can easily communicate with others in real time. When the green presence indicator shows you that a coworker is online, you can make a quick call, start a video conference, or take a few minutes to meet virtually—communication that enables you to keep your project moving forward.

If you are working with Outlook Web App or using Office Communicator, you will be able to see the presence information in the Reading Pane and in the Contacts list. Hover the mouse over a name in the message header to display a complete contact card with pictures and contact information. (See Figure 6-7.)

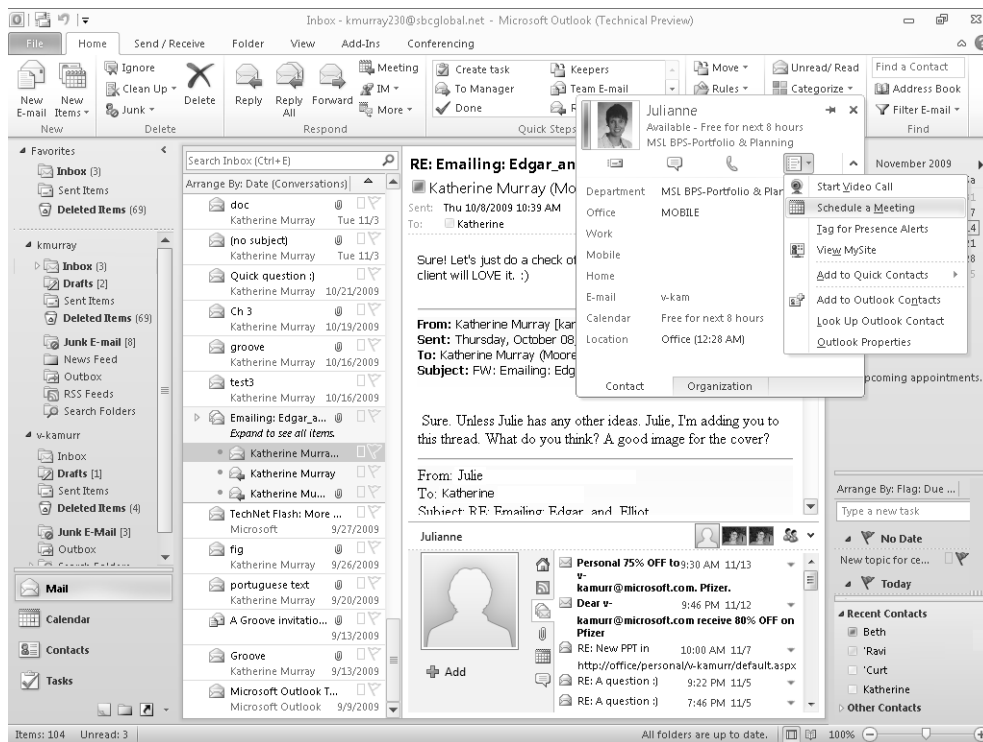**FIGURE 6-7** Outlook 2010 includes presence information for your contacts in Outlook Web App and Office Communicator.

Tip If you are using Outlook with Microsoft Exchange 2010, the MailTips feature enables you to double-check the e-mail messages you send. MailTips alert you when you are sending messages to contacts outside your office, replying to a large distribution list, or sending a message with confidential information.

The People Pane at the bottom of the Reading Pane shows you the sender's profile picture and gives you access to additional information about that person—her recent status update, any files she sent you, upcoming relevant appointments, and more. You can sign up with third-party social media sites and receive status updates and profile changes without ever leaving Outlook 2010. (See Figure 6-8.)
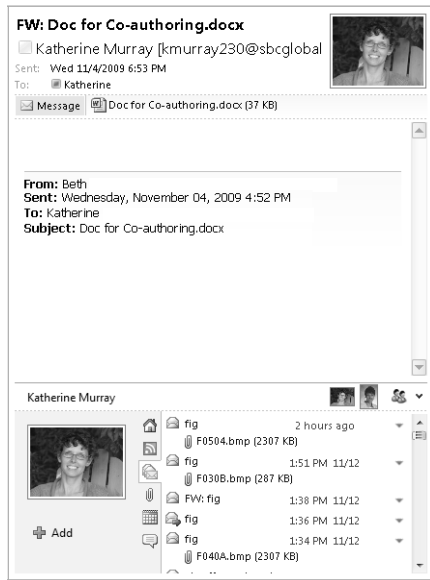
FIGURE 6-8 Outlook 2010 incorporates social media features that enable you to stay in touch with friends and colleagues through social media.

Coordinating Calendars

One of the challenges to keeping a team moving in the right direction involves finding a time to meet when everyone can attend. The new scheduling features in Outlook 2010 make viewing, updating, and sharing calendars easier than ever. And you can easily create Share groups so that all scheduling information for your team is kept together in one easy-to-understand view.

Viewing Group Schedules

The new Schedule view enables you to easily combine a number of calendars on the screen at one time. This makes setting appointments simple and enables you to coordinate the free and busy time your group needs to get things done.

Step by Step: View Calendars in Schedule View

You can easily view the calendars of everyone on your team using Schedule view:

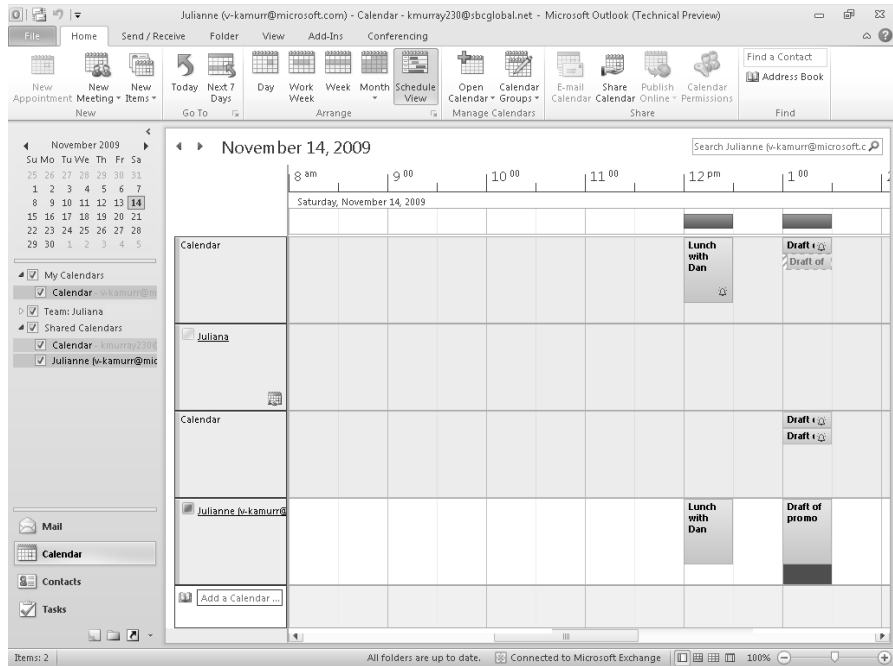1. First, make sure that others on your team have shared their calendars with you.

2. Click Calendar.

3. In the Home tab, click Schedule View. The display shows the calendars that you have permissions to view, along with busy and available times, as shown here:

Create a Calendar Group

If you are part of a team that works together regularly, you might want to create a calendar group so that you can easily view all schedules together. You can create a calendar group by clicking Calendar Groups in the Manage Calendars group on the Home tab. If you want to save the group of calendars in the current view as a calendar group, click Save As New Calendar Group. If you want to select a new set of calendars and create a group, choose Create New Calendar Group. With either selection, the Create New Calendar Group dialog box appears. (See Figure 6-9.) Type the name you want to use for the group, and click OK.
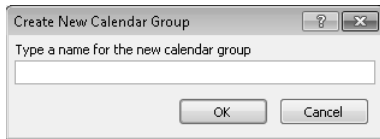
FIGURE 6-9 Create a calendar group to display all schedules for your team.

After you create the calendar group, the group name appears in the navigation pane on the left side of the calendar window. (See Figure 6-10.) You can hide the display of the group when it's not needed by clearing the check box; to redisplay the calendar group, select the check box again.
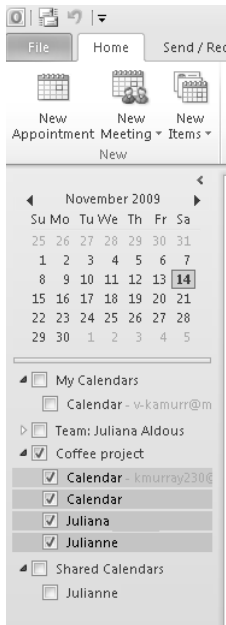
FIGURE 6-10 After you create a group calendar, Outlook 2010 adds it to your Calendars list.

Improving the Look of Your Messages

Now you can apply the professional designs available in Office 2010 themes to the e-mail messages you create and send. Outlook 2010 includes dozens of themes you can apply to the messages you send to clients, peers, friends, and family. When you apply an Office theme to your message, the colors and fonts that are part of that theme are reflected in the styles you choose to format the text in your message. Later if you choose to change the selected theme, the styles you use will also change automatically to reflect the new styles.

The Office themes also are consistent throughout all your Office 2010 files, which means that you can coordinate the files you send so that the message you send can have the same look and feel as the files you attach to it.

Step by Step: Applying Office Themes

Adding an Office theme to your e-mail messages is as simple as point and click. Here's how to do it:

1. Open the message to which you want to apply the theme.

2. Click the Options tab.

3. Click Themes. The Themes gallery appears, as shown here:
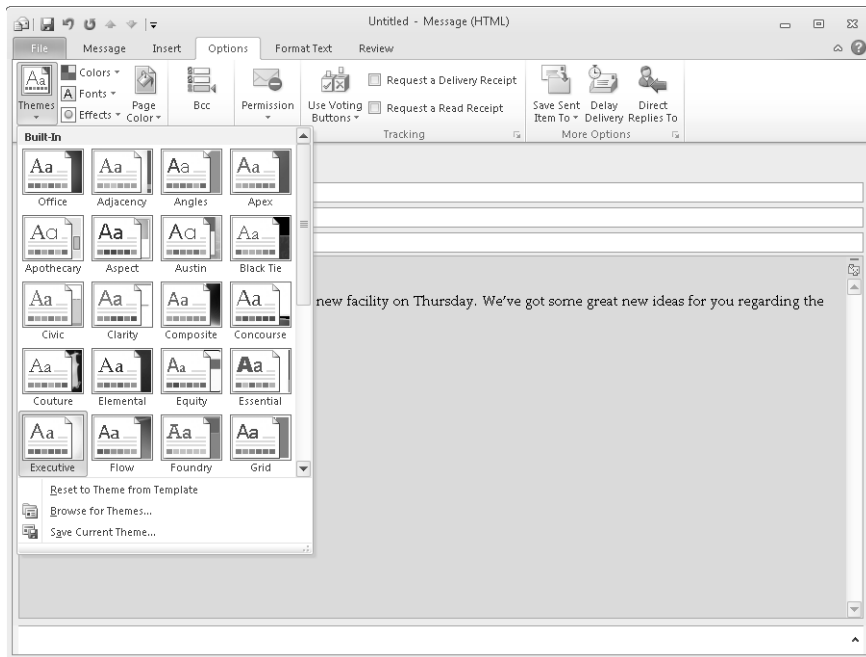
4. Hover the mouse over themes you want to preview.

5. Click the theme you want to apply to the message.

Note You can choose different fonts and colors from those offered by a specific Office theme, but if you later change the Office theme applied to the message, the fonts and colors you changed will not be updated automatically.

Keeping in Touch with Outlook Mobile

In today's mobile world, many people are accustomed to checking e-mail, receiving text messages, and updating their calendars online. Now, using your Windows Mobile smartphone, you can use the high-quality phone display to view your messages in Conversation view, selecting and moving messages using touch technology, and get online access to your calendar, contacts, tasks, and more.

Tip Let Outlook 2010 know which types of alerts you want to receive on your smartphone by clicking File, choosing Options, and clicking the Mobile category in the Outlook Options dialog box. Select the appropriate check boxes if you want Outlook to send calendar summaries and reminders to your smartphone. Additionally, you can arrange to forward Outlook items to your phone or find a text-messaging service provider and set up your phone for Short Messaging Service (SMS) messaging.

Outlook Mobile is also available to Microsoft Exchange customers as part of the standard licensing agreement.

Chapter 7

Produce Dynamic Presentations with PowerPoint 2010

In this chapter:

- Starting Out with PowerPoint 2010
- Editing and Formatting Video
- Creating and Working with Animations
- Enhancing Your Presentation with Transitions and Themes
- Adding Sections to Your Presentation
- Managing and Sharing Your Presentation

Imagine this: You're in a crowded board room waiting for your chance to present new ideas to a prospective client. You and your team have been working on this presentation for weeks. The content is just right—the approach hits the mark, and you've even added custom video clips and animations to spotlight key ideas you want the client to remember.

PowerPoint 2010 gives you the ability to add and edit video in your presentation, edit pictures on your slides, enhance animations, choose from among improved transitions, add great narration, compare and merge presentations, and much more. The collaborative features in PowerPoint 2010 enable you to easily work on your presentations with a team, communicate in real time with coworkers, and access your files anywhere—using your browser window or your smartphone.

Starting Out with PowerPoint 2010

The PowerPoint 2010 window gives you a simple, intuitive interface that provides all the tools you need for building effective, professional presentations. The PowerPoint Ribbon offers tabs that include tools specific to each of nine different tasks: File, Home, Insert, Design, Transitions, Animations, Slide Show, Review, and View. The PowerPoint work window displays Slide view by default, which shows your current slide in the largest area of the window, along with a segment for notes and a panel that will show all the slides you create in the presentation. (See Figure 7-1.)
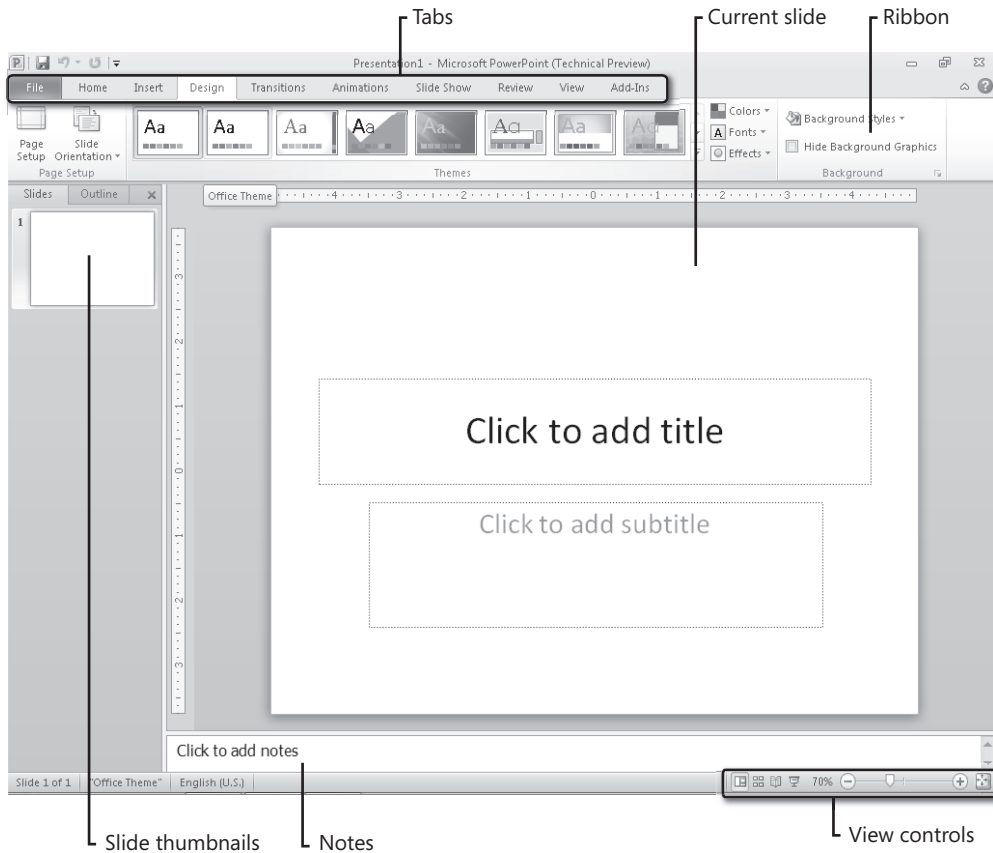
FIGURE 7-1 The PowerPoint 2010 window provides the tools for creating the current slide, adding notes, and working with all slides in your presentation.

You display Backstage view in PowerPoint by clicking the File tab. The Backstage view gives you the controls you need to work with the presentation file you're creating. (See Figure 7-2.) Commands in Backstage view enable you to optimize the media you include in your presentation, set permissions for your co-authors and teammates, control version information, and prepare the file for distribution.

Additionally, you use Backstage view to create new presentation files, print slides and handouts, set PowerPoint options, and choose how you want to share the presentation.

FIGURE 7-2 Backstage view enables you to set preferences for your PowerPoint files and compress and optimize the media files you use.

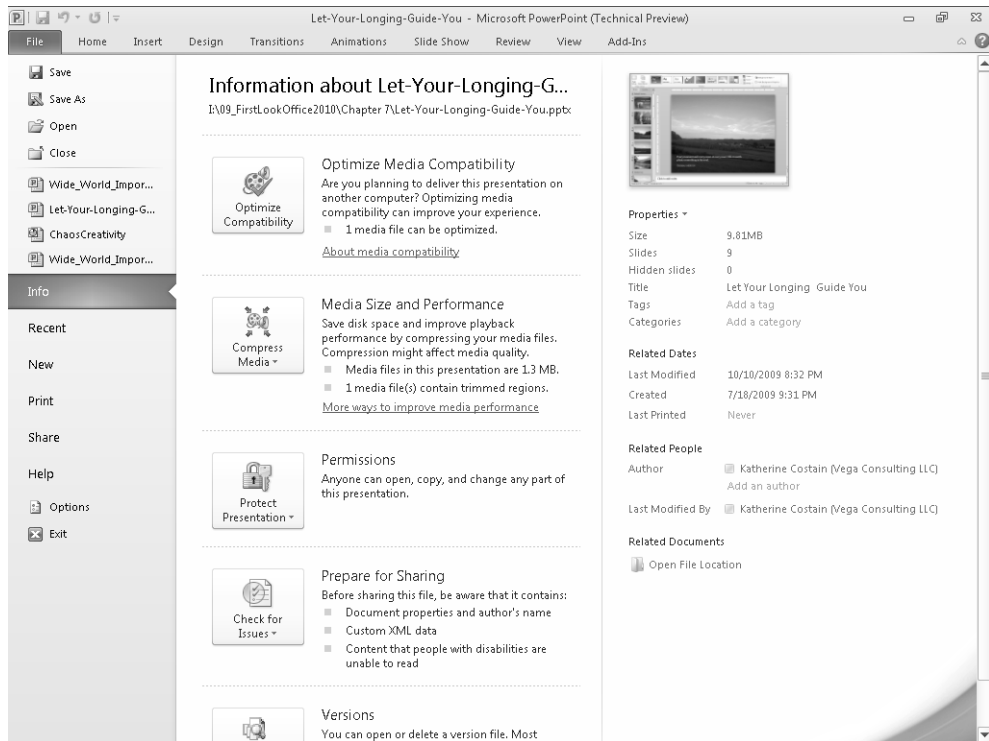> **Tip** If you are working with Office Communicator, you will be able to add and view authors in the right panel of the Info display in Backstage view. If you are using Windows Live to share your presentation, you can add authors in Backstage view but presence information will not display.

Editing and Formatting Video

Video is the big story in PowerPoint 2010. It's no secret that video is everywhere—whether you are interested in filming your own video clips to demonstrate a new product or service or want to include a video from the Web for a little visual interest, you can easily incorporate video into your PowerPoint presentation.

Now when you add a video to your presentation by choosing Video from File in the Media group of the Insert tab, the file is embedded into the presentation itself, which makes packaging and presenting a snap.

> **Tip** If you choose Video From Online Video Site, PowerPoint displays a dialog box so that you can paste the embedded code from the site onto the slide. Using this process to include video does not embed the file, however; it simply creates a link to the video online. This is an important distinction to remember if you are presenting in a place that does not have an Internet connection.

The video editing features available in Video Tools Playback enable you to trim the video without ever leaving PowerPoint. (See Figure 7-3.) When you've captured more video than you need for the current presentation, having the ability to cut the clip down to size without leaving PowerPoint is a great timesaver. You can also change the fade in and fade out values, adjust the volume, and set playback options using the editing tools in the Video Tools Playback tab.

FIGURE 7-3 You can easily trim your video in PowerPoint 2010 to select the best segment for your presentation.

PowerPoint also includes video styles you can apply to the video clip in your presentation. When you apply a style, the format remains in effect while the video plays. For example, if you choose the Reflected Perspective Right Video Style, which angles the video slightly to the right, the entire video clip will play at that angle.

Tip PowerPoint also shares the picture editing tools available throughout Office 2010. Simply click a picture in your presentation and the Picture Tools Format tab appears, offering you tools for making picture corrections, changing the color, applying artistic effects, applying picture styles, and much more.

Step by Step: Adding and Editing Video

Follow these steps to add and edit video in PowerPoint 2010:

1. Display the PowerPoint slide where you want to add the video.

2. Click the Insert tab, and click Video in the Media group.

3. On the File tab, click Video.

4. In the Insert Video dialog box, select the video file you want to add and click Insert. The video is placed on the slide.

5. Click the Video Tools Edit tab, and click Trim Video. Drag the beginning and end markers to the place you want the video clip to begin and end, as shown here:

6. Test the video by clicking the Play button. Adjust the markers as needed.

7. Click OK to save your settings.

8. Change the Fade In and Fade Out settings to change the way the video begins and ends.

   You can continue to make changes and play the video by clicking the Play button in the video player on the slide.

> **Tip** Now you can add precision to your slides by using the dynamic alignment guides. These guides appear automatically whenever you drag an object on the slide, helping you align the object with other elements on your slide.

Creating and Working with Animations

PowerPoint's improved animation features enable you to animate objects on your slide, spotlighting key points and adding movement to your presentation. The animations in PowerPoint 2010 are now more realistic, creating the effect of smooth movement for the animations you create. (See Figure 7-4.)
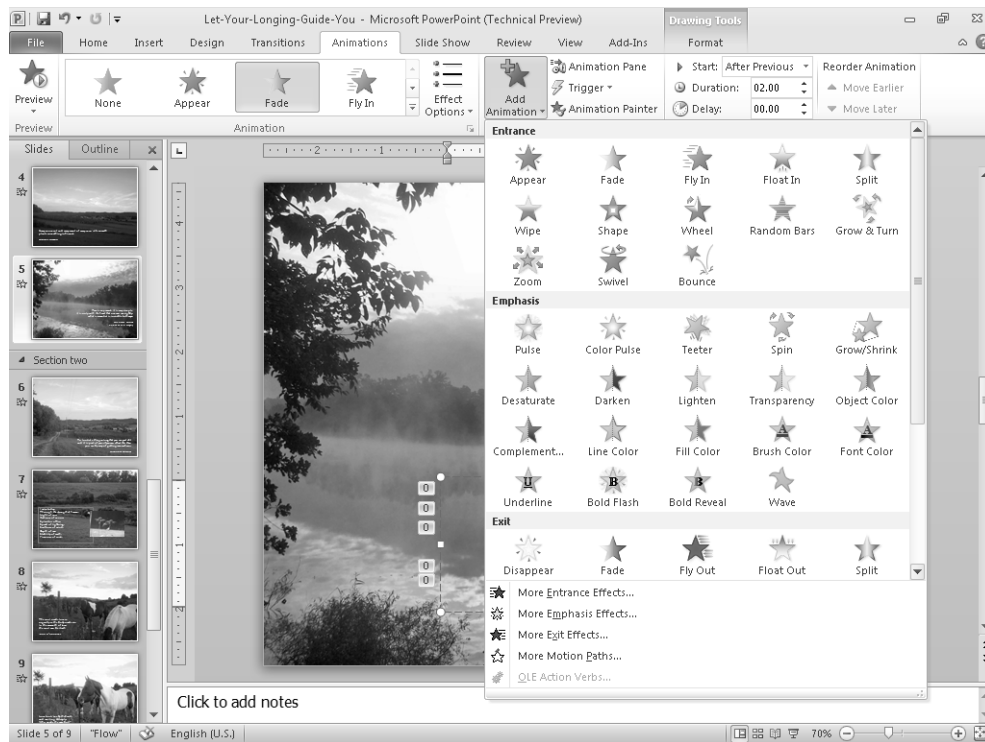
FIGURE 7-4 PowerPoint 2010 now includes improved animations you can add to virtually any object on your slide.

> **Tip** PowerPoint 2010 includes a number of new transitions that enable you to control the way your slides advance. The transitions you choose are important because they convey the over-all tone of your presentation—slow or fast, blocks or fades, sweeps or subtle dissolves—each transition contributes to the overall effect you're creating.

When you add an animation to your slide, the Trigger tool becomes available in the Custom Animation tab of the Animations tab. Using the Trigger feature, you can add a bookmark to trigger the animation you want to play on the slide.

PowerPoint also includes the Animation Painter, which enables you to apply animation settings to other objects on your slide. This feature is similar to the Format Painter, which enables you to choose format settings to apply to other text in your document.

Step by Step: Adding an Animation

Here's how to add an animation to your slide in PowerPoint 2010:

1. Display the PowerPoint slide where you want to add an animation.

2. Click the object you want to animate.

3. In the Animations tab, click Add Animation in the Custom Animation group. A gallery of animation options appears.

4. Point to different animations to see how the animation looks on the slide. Click the style you want.

5. You can customize the animation by choosing the options at the bottom of the Add Animation gallery.

   After you add the animation, you can fine-tune the animation's behavior by using the tools in the Animation, Custom Animation, and Timing groups. After you make changes, use Preview to view your changes.

Tip PowerPoint 2010 also includes improved narration features, which means that you now can record voiceovers that you play back during your slide show. To try the narration feature, connect your microphone and make sure it's working; then click Record Slide Show in the Set Up group of the Slide Show tab.

Enhancing Your Presentation with Transitions and Themes

If you've been using PowerPoint for any length of time, you've no doubt already discovered slide transitions. Transitions give your presentation a professional touch by fading, dissolving, wiping, or panning one slide into another. PowerPoint 2010 introduces great new transitions to help you capture and keep the attention of your audience. (See Figure 7-5.) The new transitions are easy to find and apply; and you can preview the different effects until you find just the transition style you want. You can apply transitions to a single slide or to all slides, and you can customize the transition by specifying the duration of the transition, deciding whether to apply a transition sound, or choosing transition effects.
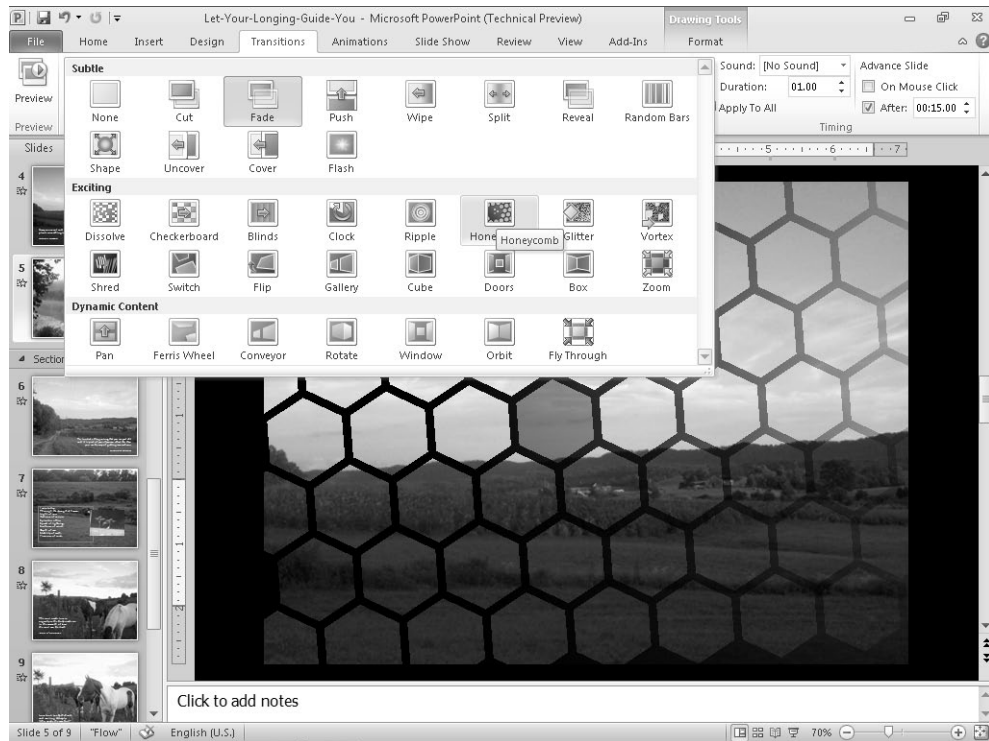
FIGURE 7-5 PowerPoint 2010 includes new transitions you can apply to your slides.

Step by Step: Applying Transitions

Here's how to apply slide transitions in PowerPoint 2010:

1. Open the presentation to which you want to apply the transitions.

2. In the Transition To This Slide gallery, click the transition you want to try.

3. Experiment with other transitions until you find the one you want to use.

4. Click Effect Options to display the additional choices for the transition you se-
   lected, and choose the effect you want.

5. If you want to add sound to the transition, click the Sound arrow and choose the
   sound you'd like to add.

6. In the Duration field, set the number of seconds you want to allow for the transi-
   tion to be completed.

7. If you want to apply the transition settings to all slides in the presentation, click
   Apply To All.

Adding Sections to Your Presentation

Now in PowerPoint 2010 you can organize your presentation into sections to enable you to navigate through your slides in the way that fits your content best. Suppose, for example, that your presentation introduces your audience to a new program being offered through your human resources department. As you begin the presentation, you discover that the group has previously seen an introductory presentation that covers all the material you introduce in section one. Because you have organized your presentation in sections, you can easily jump to section two of your presentation and continue with the information your audience hasn't seen, without missing a beat. (See Figure 7-6.)
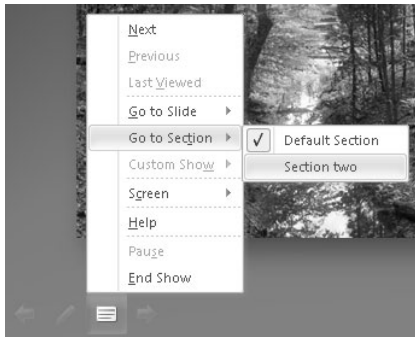

FIGURE 7-6 Create sections and use them to navigate easily during the presentation.

Working with sections also enables you to organize long presentations so that you can work with them easily while you're creating and editing your work. When you add a section—by clicking the first slide in the section you want to create, clicking Section in the Home tab, and choosing Add Section (as shown in Figure 7-7)—the Slides view changes to highlight the new section. Additional controls enable you to rename, collapse, expand, and remove sections easily.
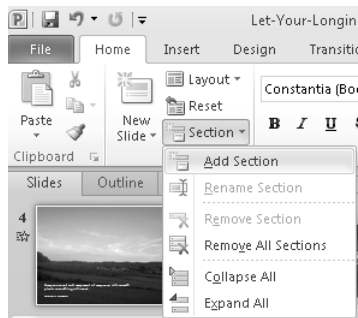

FIGURE 7-7 Add sections to your presentation to better organize and navigate longer slide shows.

Managing and Sharing Your Presentation

Because it's likely that you will be collaborating with others on the presentations you create, PowerPoint 2010 makes it easy for you to manage, compare, merge, and share presentations. This reduces the likelihood that you'll have multiple versions of the same file in circulation and enables you to keep the project moving by communicating with other authors easily while you work.

Merging Presentations

If you are combining changes that several reviewers have made in a single presentation, the Compare tool in PowerPoint 2010 can simplify the process of putting it all together. The Compare tool helps you see which changes have been made in the presentation and create one merged file that reflects the latest version of the shared file.

The compared view shows the changes made among the versions and provides the Revisions panel to help you see where the changes were made and what they entailed. (See Figure 7-8.) You can click the small note icons on the slides to display information about the specific changes made to the elements on the slide.
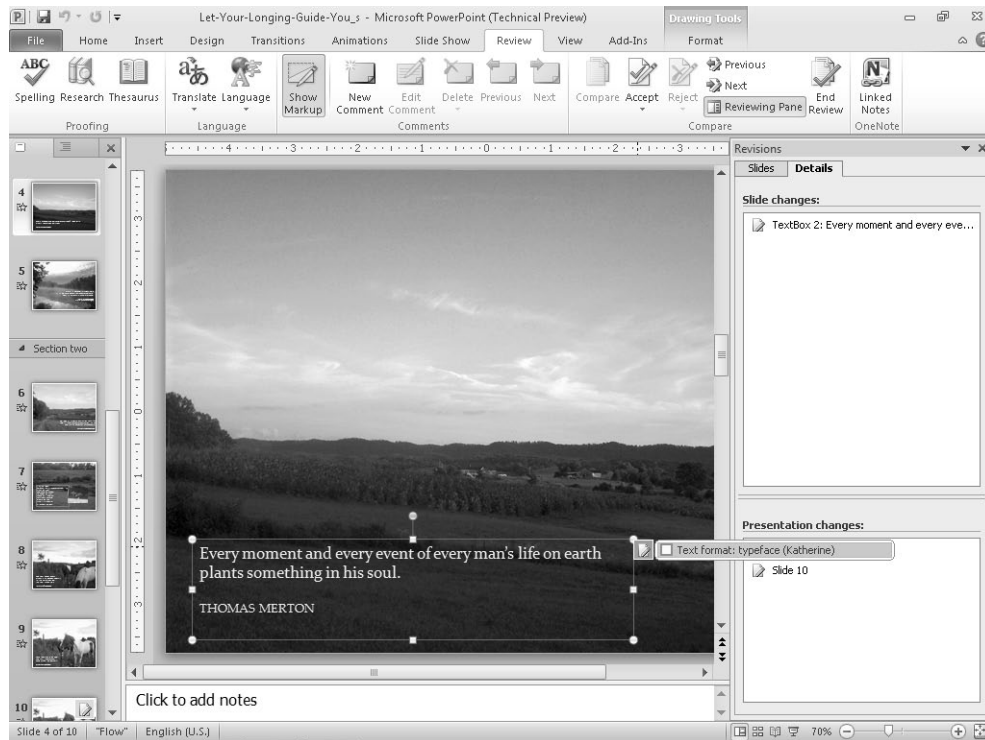

FIGURE 7-8 PowerPoint 2010 compares and displays changes among versions of the file.

Step by Step: Comparing Presentations

Follow these steps to use the compare and merge feature in PowerPoint 2010:

1. Open the presentation that you want to compare to another version of the file.

2. Click the Review tab, and click Compare.

3. In the Choose File To Merge With Current Presentation dialog box, navigate to the folder with the file you want to use.

4. Select the file and click Open.

5. PowerPoint displays the merged file and shows the Revisions pane to list the changes between the versions. Click a change in the Details pane to display a pop-up list of changes to that element.

6. Select the check boxes of changes you want to keep. Repeat this step for all changes in the presentation.

7. To save the merged file, press Ctrl+S. To discard the changes, close the file without saving.

Tip PowerPoint includes co-authoring capability for users who work with SharePoint Workspace 2010 or Windows Live. Co-authoring gives you the ability to work collaboratively with authors on the file. You can share the file by clicking the File tab to display Backstage view and then clicking Share. You can enter author information in the Related People area of the Info panel in Backstage view. If you are using Office Communicator, you can send an instant message to another author while you work on a slide, which enables you to ask and answer questions in real time while you work.

Broadcasting Your Presentation

PowerPoint 2010 enables you to broadcast a presentation to others at remote locations whether or not they have PowerPoint installed on their computers. The Broadcast Slide Show feature works with SharePoint Server 2010 or Windows Live. You simply choose Broadcast Slide Show in the Start Slide Show group of the Slide Show tab and click Start Broadcast. (See Figure 7-9.) The broadcast service sends your remote audience members the link to your presentation so that they can log in using their Windows Live account and participate directly.

Note Broadcasting your presentation in this way displays the visual portion of your presentation only; no audio is transmitted. If audio is necessary for your presentation, you might want to set up a conference call so that participants can hear your narration, ask questions, and participate in the presentation.

FIGURE 7-9 Broadcasting a slide show.

PowerPoint 2010 gives you the choice of sending an e-mail message or an instant message to the people who want to view the presentation. When others receive the link, they can simply click it to join the presentation in real-time. (See Figure 7-10.)
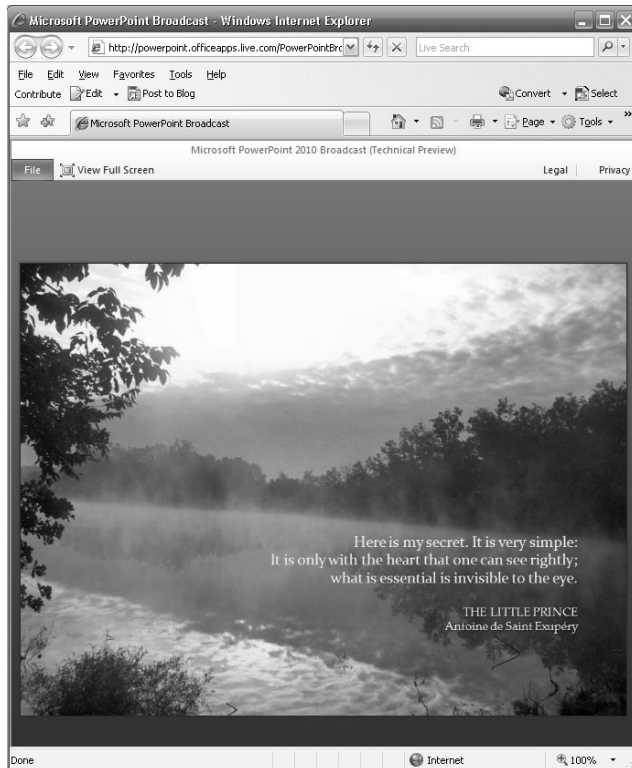

FIGURE 7-10 Others can view your broadcast presentation in real time whether they have PowerPoint or not.

Printing Presentation Notes

If you have written a script or presentation notes that you want to have available in your pre-sentation, you can print them easily using Backstage view. Simply click the File tab to display Backstage view, and click Print. In the Print display, select the Full Page Slides setting in the Other Settings area. A pop-up gallery of print layouts appears. (See Figure 7-11) Click Notes Pages, and then click the right arrow below the preview document to page through your notes.

Tip PowerPoint also includes the Create Handouts In Microsoft Word feature to enable you to save your notes, along with the representative slides, to a Word document. To save the notes to Backstage view, click File to display Backstage view, click Share, and click Create Handouts In Microsoft Word. Finally, click Create Handouts.
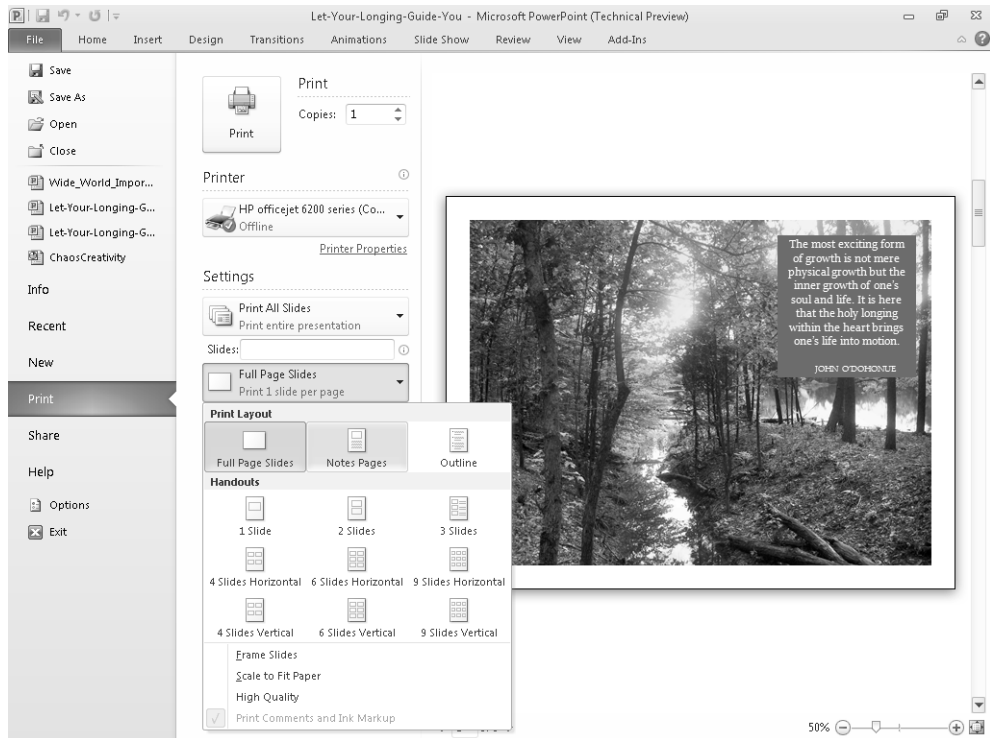

FIGURE 7-11 You can easily print your presentation notes by choosing Notes Pages in the Print settings.

Save Your Presentation as a Video

Another new feature in PowerPoint 2010 makes it easy for you to save your presentation as a video and share it with others. Click File to display Backstage view, and click the Share tab. Then click Create A Video to display the available video options. Table 7-1 shows your choices for the level of video quality.

TABLE 7-1 Video quality for presentations

Used For	Resolution	Quality	Frames Per Second
Computer & HD Displays	960 by 720	High	30
Internet & DVD	640 by 480	Medium	24
Portable Devices	320 by 240	Low	14

After you choose the video quality, click the Use Recorded Timings And Narrations option. A range of options enables you to disallow timings and narrations, set new timings and narrations, preview the current settings, or use the existing settings. Click the Create Video button to start the process, and PowerPoint saves a video as a .wmf file. (See Figure 7-12)
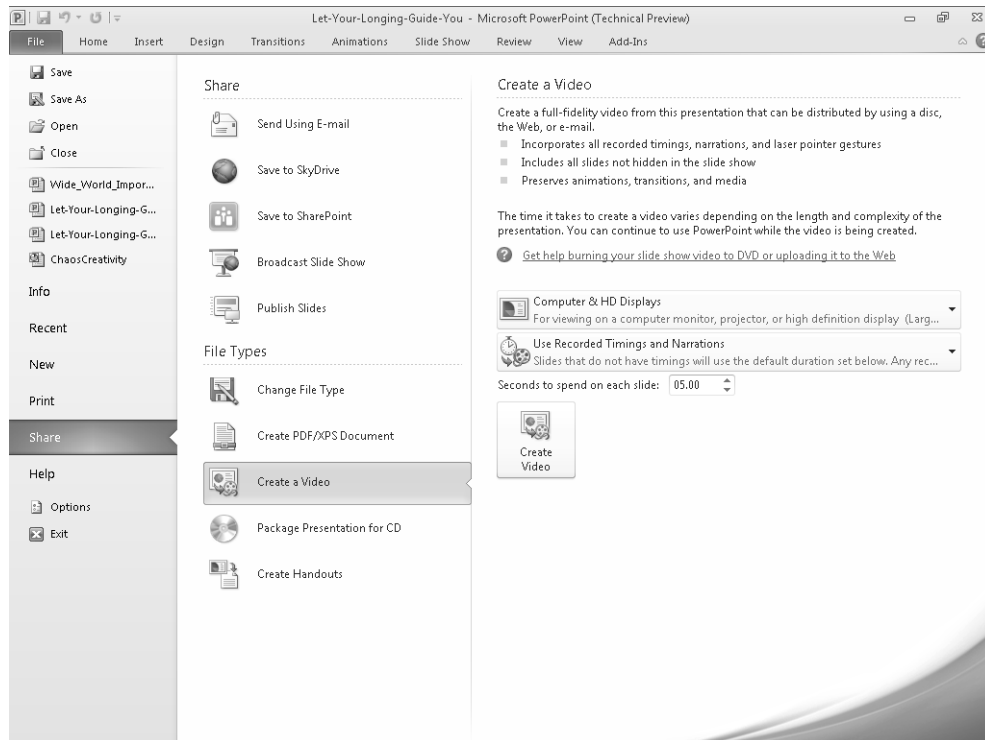

FIGURE 7-12 Create a video of your PowerPoint presentation.

Work with the PowerPoint 2010 Web App

As part of the access-anywhere approach available in Office 2010, you can use the PowerPoint Web App to view and edit presentations from your Web browser. The PowerPoint Web App offers a limited set of editing tools in the familiar Ribbon interface (shown in Figure 7-13); you also can work collaboratively with other authors using the PowerPoint Web App and display your presentation in full-screen view.
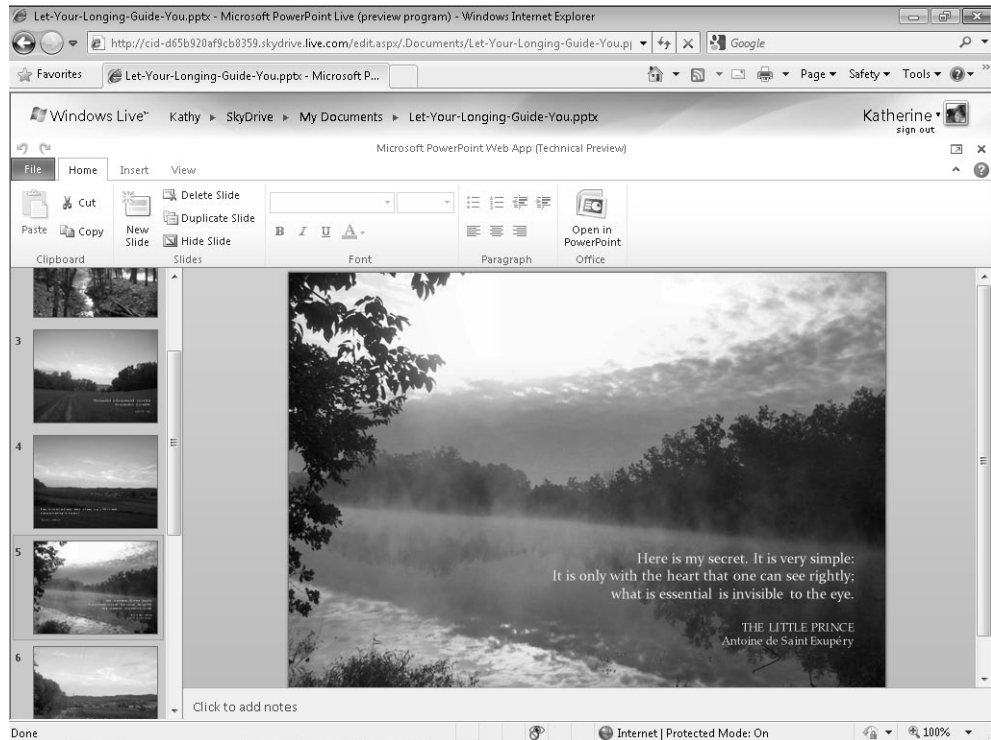

FIGURE 7-13 PowerPoint Web App displays your presentation in the familiar Office interface.

Using PowerPoint Mobile 2010

PowerPoint Mobile 2010 enables you to view your presentation slides in the familiar Office interface designed for the simplicity of a small mobile screen. You can use PowerPoint Mobile

2010 to review your presentation notes, easily work with slides using Slide Manager, and page through the slides you're presenting. And in the live presentation, you can also use PowerPoint on your smartphone to advance your slides remotely.

Tip If you use a Tablet PC or another device with tablet features, you can take advantage of the better inking features in PowerPoint 2010. A greater variety of inking tools—including a large collection of pens and expanded inking options—are available for you to use. You'll find the inking features in the Review tab of your tablet-enabled device.

Chapter 8
Organize, Store, and Share Ideas with OneNote 2010

In this chapter:

- Starting Out with OneNote 2010
- Capturing Notes Easily
- Working with Linked Notes and Task Notes
- Finding Just the Notes You Need
- Sharing Ideas Effectively
- Accessing Your Notes Anywhere

Are you a big note-taker? Do you scribble ideas on backs of envelopes, sticky notes, scraps of paper, and pieces of napkins? Taking notes is a good practice—and it just might turn out that one of those notes will have the perfect answer to a problem down the road. But if you can't find what you've scribbled later, chances are that your inspiration will go to waste.

Microsoft OneNote 2010 is the electronic equivalent to a handy notebook, with a twist: the program is designed to capture text, links, Web content, video and audio clips, articles, drawings, and more—in whatever way you collect them. Whether you prefer to doodle your ideas, speak into a microphone, scribble cryptic notes, or clip pieces of Web pages, OneNote makes it easy to pull all that content together in one searchable place where you can find it easily later. And as you continue to amass ideas that fascinate you, you can easily find and incorporate those sparks of inspiration into your current projects.

The new features in OneNote 2010 make it easy to collect notes from Microsoft Office 2010 applications such as Word, PowerPoint, and Outlook and print the notes to your OneNote notebook. You can also share your notebooks and track changes by author, version, recent changes, and more. So even though you work collaboratively, you can still separate the great ideas from the good ideas. The search feature in OneNote is now better than ever and includes an expanded search pane, which enables you to see at a glance all the occurrences of the search phrase that appear in your notebook.

The OneNote Web App enables you to access your notebooks from any place you have access to the Web, and OneNote Mobile makes it possible for you to review and do simple editing in your notebook using your smartphone. As you begin to use OneNote regularly to collect your thoughts and plans, you'll realize that more and more of your great ideas are actually making it into the work you do in Office 2010.

Starting Out with OneNote 2010

The OneNote 2010 window gives you a great range of flexibility in the way you work with the notes you create. Each tab in the Ribbon offers tools related to a specific note task: File, Home, Insert, Share, Draw, Review, and View. (See Figure 8-1.) The various areas of the OneNote window enable you to work with the notes you create in different ways:

- The Navigation Bar enables you to move easily among your notebooks. You can click the expand button at the top of the Navigation Bar to display a list of all notebooks and the pages they contain.

- Section tabs give you a simple way to store different types of information in your notebook. You can create subpages and sections within each section and rename the section tabs to fit your needs.

- The page tabs display the titles of existing pages in the current section. You can click page tabs to move among pages in a section easily.

- The OneNote page collects your notes in any way you want to enter them. Simply click anywhere and type, write, or draw, or add a voice, video, or file object.
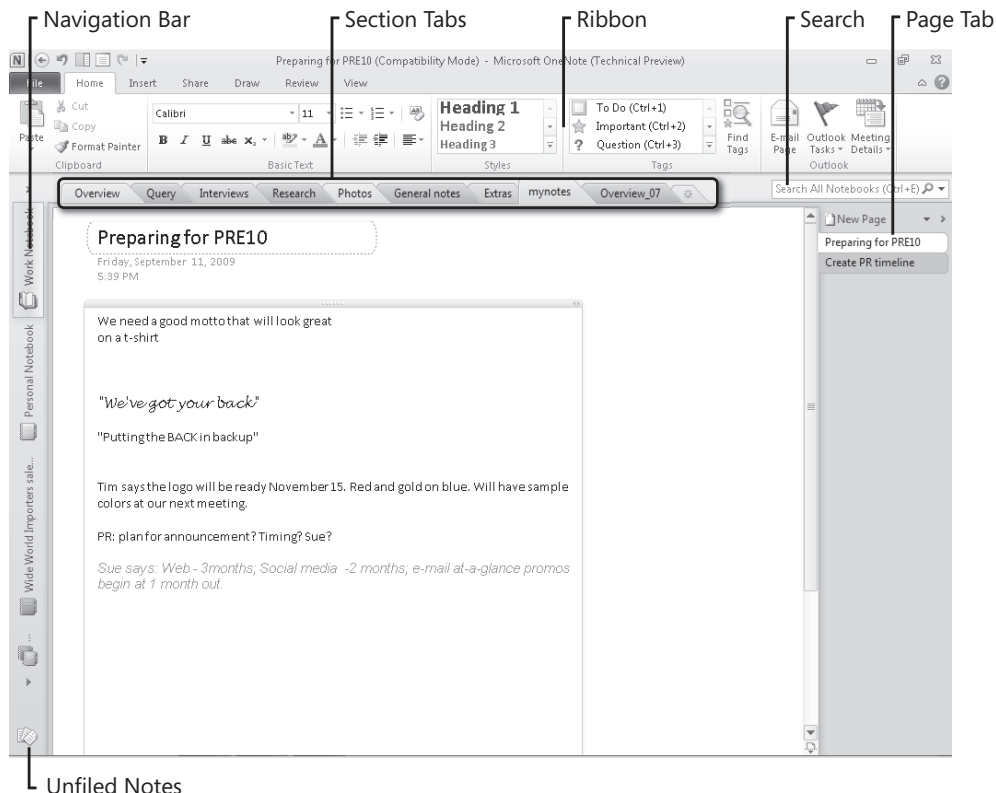

FIGURE 8-1 The OneNote 2010 window gives you access to your notebooks, unfiled notes, and much more.

Capturing Notes Easily

The whole idea behind OneNote is that you need one central location where you can gather all your notes—in whatever form—so that you can organize, share, and use them easily. You might insert pieces of interviews, maps to locations, clips of video, photos of products, meeting notes, articles, and anything else that provides you with the information you need for the projects you're creating.

Today everyone suffers from information overload in one way or another, and we all find ways to do our best to manage the data that comes our way. Developing a smart, fast method of organizing your notes helps you be more efficient and bring an even greater range of resources to your work. One Note 2010 includes several features that make it simple to create and work with the information you capture in your notebooks.

Using OneNote as You Work

Chances are that as you work on a specific document, worksheet, or presentation—or even as you're composing an e-mail message or surfing the Web—ideas are occurring to you that relate to the task at hand. If you're editing a report, for example, you might think of a site you visited last week that had some interesting statistics about the topic you're reviewing. Using OneNote, you can make a note to yourself to look up that site when you're finished editing. And you can make the note right alongside the work you're doing in Word.

The Dock To Desktop feature in OneNote lets you easily position OneNote in a reduced-size window alongside other open applications. This means you can take notes—or refer to notes you've already taken—while you're working on a document, worksheet, or presentation, To dock OneNote to your desktop, click the Dock To Desktop tool in the Quick Access Toolbar in the top left corner of the screen. The OneNote window shrinks to the current note page only, as you see in Figure 8-2.

When you're ready to expand the OneNote window to full screen view, click the Full Screen icon in the Quick Access Toolbar. To return the Navigation Bar, section tabs, and page tabs to the display, click the View tab and click Normal View.

> **Tip** Although there's no hard-and-fast rule for the way your notes are supposed to look in your own personal notebook, using specific styles on your note headings can help you find the information you need easily when you're scanning through the pages. You can now apply Quick Styles to your note headings by selecting the text (or clicking where you want the style to begin) and clicking the style you want in the Styles group on the Home tab.
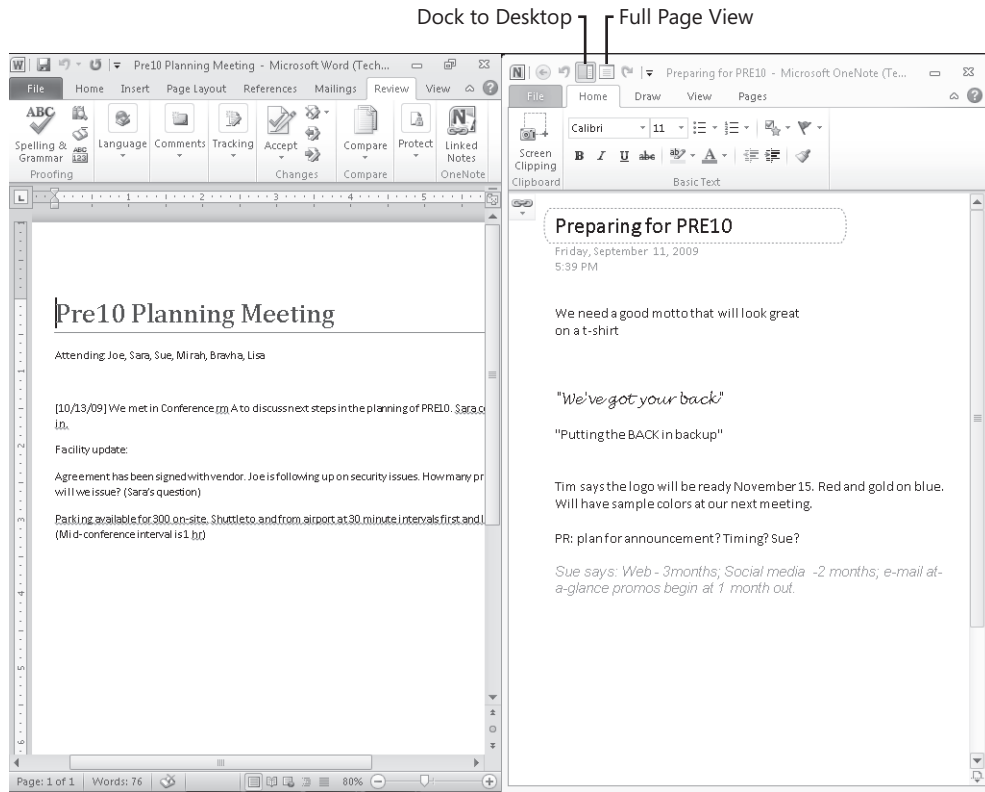
Dock to Desktop ⌐   ⌐ Full Page View

FIGURE 8-2 You can use Dock To Desktop mode to keep a OneNote page open alongside your other application or browser window.

Tip One new feature in OneNote 2010 enables you to recover notes you've previously deleted. To restore deleted notes, click the Share tab, and in the History group, click Notebook Recycle Bin to open the bin so that you can open the notes you want to preserve.

Create Notes Anywhere

For OneNote 2010 to be a hub for all the notes you collect, the program needs to work seamlessly with your other Office applications. Perhaps you finished a presentation and realize after the fact that you can use it as the basis for another project you'll be working on next month. You can save the presentation in your OneNote notebook for that project with just a few simple clicks.

You can use the Print command in either Word 2010 or PowerPoint 2010 to send an entire file—in living color—to the OneNote notebook you select. You can then clip sections, graphics, notes, or slides; leave the entire file as is; or use the content in other documents or notebooks you create. This technique is simple, reusable, and smart—putting your content within easy reach for you to use in other projects down the road.

Step by Step: Printing a File to OneNote 2010

Here's how to incorporate an entire file in your OneNote 2010 notebook:

1. Open the PowerPoint presentation or Word document you want to add to your OneNote notebook. (This example uses a PowerPoint presentation, but the process is the same for either application.)

2. Click the File tab to display Backstage view.

3. Click Print. In the Printer area, click Send To OneNote 2010, as shown here:
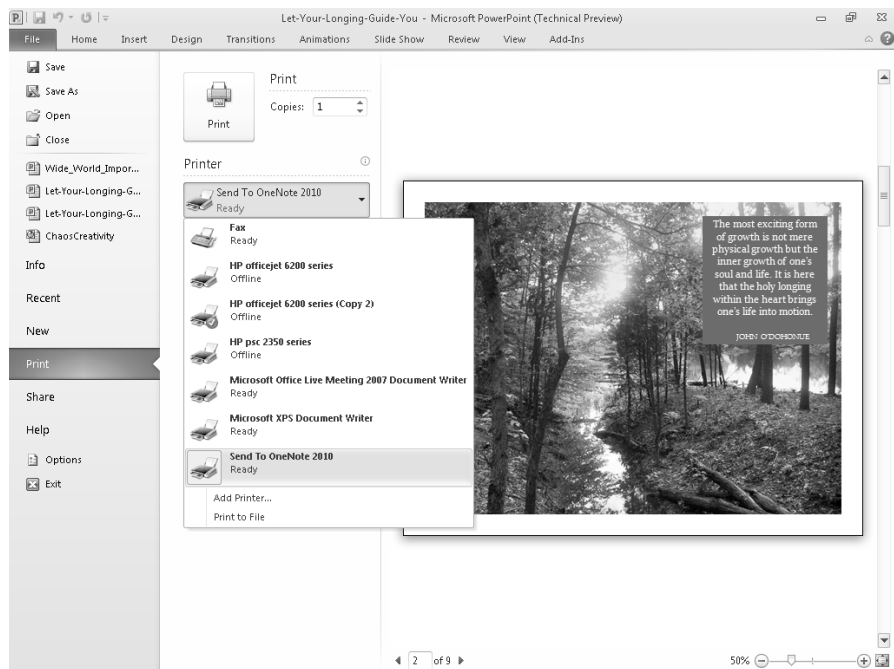
4. Click Print. The Select Location In OneNote dialog box appears, as you can see here:
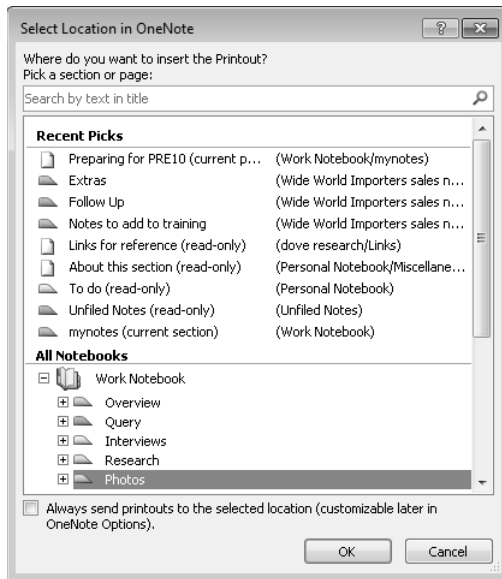
5. Click the expansion button to the left of the notebook to which you want to add the file.

6. Click the section or page where you want the article to be placed, and click OK. The entire file is inserted on the page you selected.

Working with Linked Notes and Task Notes

OneNote 2010 offers the Linked Notes feature in Word 2010, PowerPoint 2010, and Internet Explorer 8. Suppose that you are writing a report in Word 2010 and you want to check something in the notes you took at the last team meeting. While you're working in the document, click the View tab and then click Linked Notes. The notebook you used to gather ideas for this document opens automatically in a panel along the right side of the Word window. OneNote automatically saves a link to the file or Web page you are reviewing so that you can easily return to the source of your notes later. When the OneNote window is open, you can add, edit, move, search, or organize your notes; copy them into the Word document; or simply check what you wanted to review and close the file.

Note The Linked Notes feature does not appear automatically in the Internet Explorer toolbar. To open a OneNote page while working in Internet Explorer 8, click Tools and choose Linked Note from the Tools menu.

The first time you use the Linked Notes feature with a new file, OneNote 2010 will display the Select Location In OneNote dialog box so that you can choose the notebook, section, and page you want to use with the current application. Expand the notebook to display the sections and pages; then click the OK button and the OneNote page appears in a small window along the right side of your work area.

Tip Linked Notes works only with OneNote 2010, so if you have saved your notebook to be compatible with OneNote 2007 users, you will need to convert the notebook to OneNote 2010 in order to use Linked Notes. A dialog box will prompt you to change the notebook properties if Linked Notes is not currently available for your file.

OneNote 2010 is also available in Outlook 2010, enabling you to easily capture notes on project-related tasks you create for yourself or for members of your team. To send the Task Notes you create to a OneNote 2010 notebook, simply create and save the task; then click OneNote in the Actions group of the Task tab. (See Figure 8-3.)
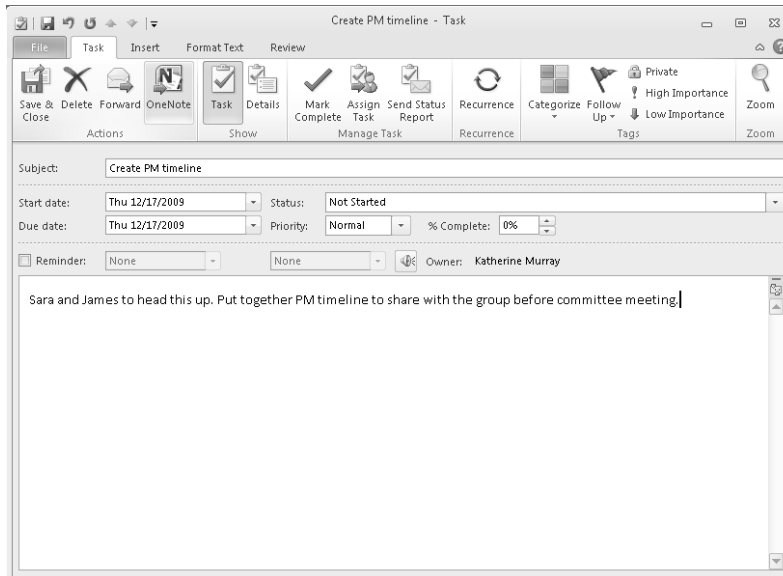

FIGURE 8-3 You can easily send task information to a OneNote notebook.

Finding Just the Notes You Need

If you're like most people, a percentage of the notes you take never make it into any kind of practical use. Why? Chances are that a number of your good ideas simply get lost—stuck in a coat pocket somewhere, left in your other briefcase, or forgotten on the table of the restaurant. With OneNote 2010, you capture all your information in one easy-to-navigate place, which means you can always retrieve what you need easily using OneNote's powerful search tools.

In OneNote 2010, the search features have been expanded so that they now go through all types of content—including video clips, embedded objects, and more. The search navigation pane appears as you begin to type a search word or phrase, showing you all the places in your notes where the search characters appear. (See Figure 8-4.)
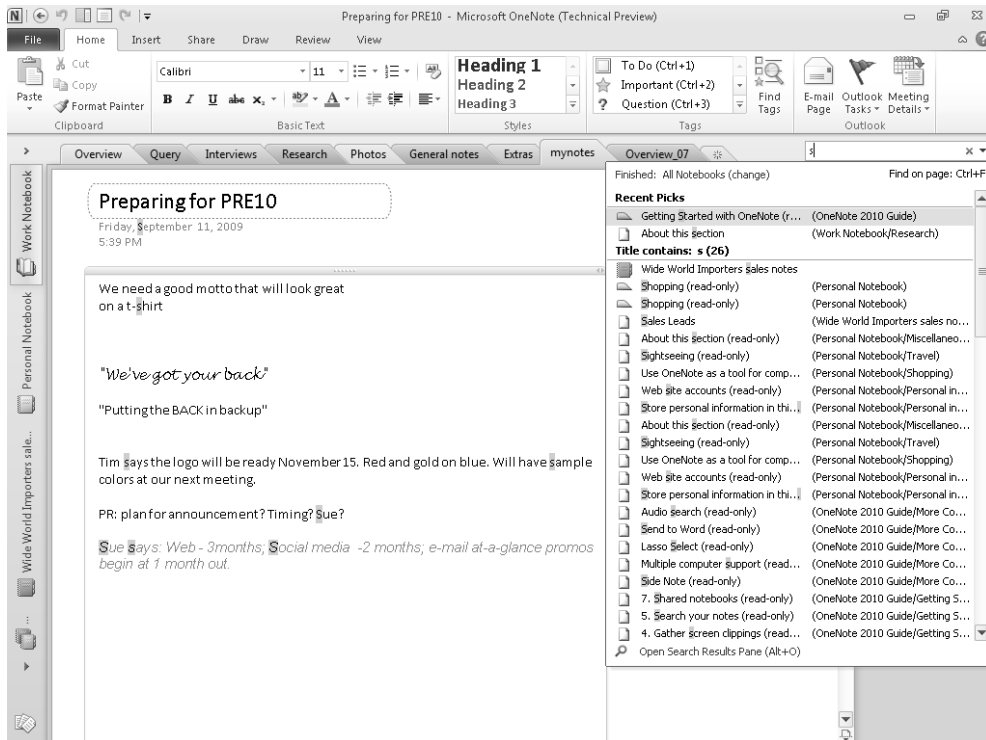

FIGURE 8-4 The expanded search pane instantly shows results as you begin to type your search phrase.

You can customize where OneNote searches information in your notebooks by clicking the Finished: All Notebooks (Change) link at the top of the search pane, and if you want to keep the Search Results Pane open alongside the work area, click the Open Search Results Pane link at the bottom of the search pane.

Sharing Ideas Effectively

One of the great things about OneNote is that it serves as a creative catch-all for any type of information you gather related to a specific project, idea, or event. No matter what your team is working on, team members can save text notes, diagrams, sketches, audio clips, video clips, Web links, and even doodles to the pages in your shared notebook.

OneNote 2010 includes a number of new sharing features that help you recognize easily who has added what—and when. You will be able to search through the notebook by author, highlight the changes you haven't read, check note versions, and much more. You'll find all the tools you need for working with shared notebooks on the Share tab. (See Figure 8-5.)

FIGURE 8-5 The new Shared Notebook features in the Share tab enable you to track the changes in the notebook that are made by your team.

Creating a Shared Notebook

To create a new shared notebook in OneNote 2010, click the Share tab and click New Shared Notebook in the Shared Notebook group. Backstage view appears, with Network Notebook selected. Enter a name for the new notebook, and click Browse to select a location for the notebook. Finally, click Create Notebook to add the new shared notebook to your files.

Tip After you've created a notebook, you can invite others to share the notebook with you by displaying the Info page of Backstage view. All notebooks are listed, showing the title of the notebook, the Settings button for each notebook, as well as the location of the notebook file and the sharing status of the notebook. To display the properties for the notebook, click the Settings button and click Properties.

Finding Entries by Author

Suppose that you've been discussing a new idea for a video clip with one of your team-mates, and she mentions that she posted the link to a video she liked on a page in your shared OneNote notebook. How can you find the note she added to the file? The Find By Author tool in the Shared Notebook group on the Share tab enables you to sort entries first by person and then by date, showing the most recent posts first. In this way you can find the author's name, read the description of the addition as well as the date, and then click the one you want to display it in the OneNote page view. (See Figure 8-6.)
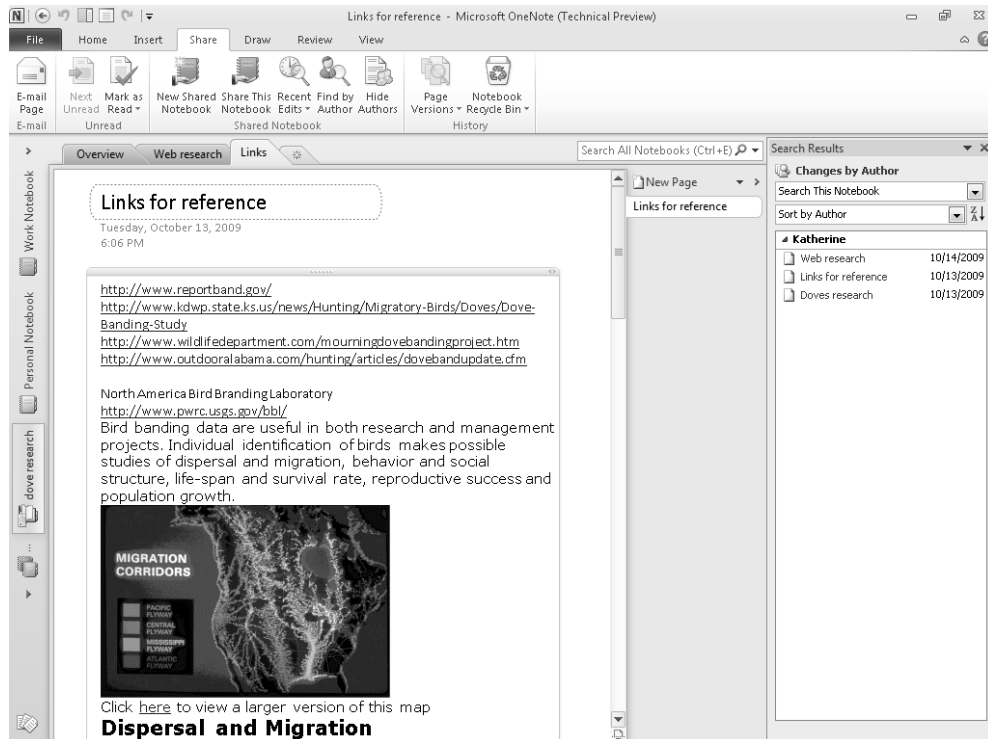

FIGURE 8-6 Find By Author enables you to display all entries made by author, date, and description so that you can move easily to the note you need.

Working with Page Versions

One of the challenges in working with multiple authors on a notebook is that it can be difficult to tell which version of the page you're viewing. Are you adding your notes on the most recent version of the page? OneNote 2010 includes the Page Versions feature to help

you determine that you're working on the most recent page available so that you can be sure all changes are incorporated in the page you're viewing. Simply click the Share tab and click Page Versions in the History group. (See Figure 8-7.)
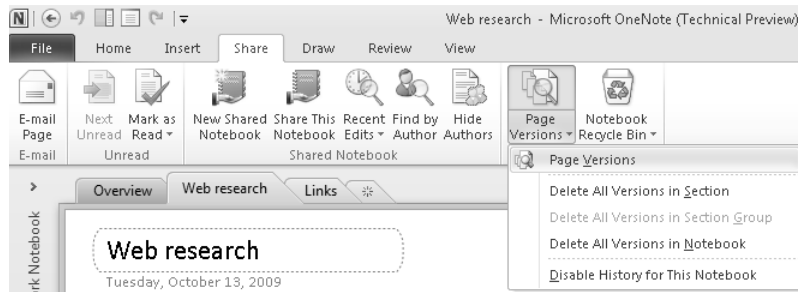

FIGURE 8-7 Displaying page versions enables you to review the content added to your pages and make sure you're working with the most current page.

Tip You can also use page versions to undo changes that were made inadvertently. You can return the page to an earlier version, and changes will be merged and synched automatically.

Accessing Your Notes Anywhere

Following the work-anywhere trend set by the other applications in Office 2010, OneNote 2010 enables you to add, update, and share notebooks on the Web or access and make changes to your notes using your Windows Mobile smartphone. The OneNote Web App enables you to view, share, and edit your notes pages; you can easily add notes, edit existing notes, and capture links, screen shots, files, and more. Additionally, OneNote Mobile fits the OneNote 2010 interface to the small smartphone display, enabling you to review, update, and work with your notes while you're on the go. When the product is available, you will be able to set up OneNote Mobile to work with your Windows Mobile smartphone by clicking File and choosing Options in Backstage view. Click the Advanced tab and scroll down to the OneNote Mobile settings. Click the Install OneNote Mobile button to install the mobile version of OneNote 2010 and set up the software for your smartphone.

Chapter 9

Collaborate Effectively with SharePoint Workspace 2010

In this chapter:

- What Can You Do with SharePoint Workspace 2010?

- Starting Out with SharePoint Workspace 2010

- Setting Workspace Preferences

- Accessing Your Files Seamlessly

- Simplified Searching

- Checking Files In and Out

- Connecting with Your Team Instantly

- SharePoint with InfoPath and SharePoint Business Connectivity Services

- Using SharePoint Workspace on the Go

When you need to send a document to a teammate for review, what do you usually do? Most people attach a document to an e-mail message and click Send. This works—somewhat inefficiently—for a file two people share, but what happens when you have six or eight people on your team? You could conceivably have multiple versions of the same file moving back and forth through e-mail; how will you know when you are working on the most recent version of the file?

SharePoint Workspace 2010 takes all the guesswork out of collaboration by providing you with an easy-to-use workspace in which you can post files you want to share, hold discussions, chat in real time, and check files in and out. You can synchronize files with SharePoint Server 2010, ensuring that your document libraries, InfoPath forms, and other files are current and up to date. SharePoint enables you to work with your files—and each other—as you collaborate in real time to complete your shared projects.

And for those times when you want to work with files stored on the server but won't be able to maintain your server connection while you work, SharePoint Workspace 2010 works with SharePoint Server 2010 to enable you to take content offline so that you can do the work you need to do and upload the files when you reconnect. Taking your content offline is a big benefit when you're on the road, because you can ensure you're working with the most re-cent version of the file and integrate your changes automatically when you log back into the server. In the meantime, you can lock the file so that other users won't inadvertently make changes that can be overwritten later.

What Can You Do with SharePoint Workspace 2010?

SharePoint, as the name implies, is all about sharing—sharing files, sharing discussions, shar-ing folders and workspaces and contacts. SharePoint Workspace 2010 is the next incarnation of Microsoft Office Groove, which is available both as part of Office 2010 and as a standalone product. Because sharing files and information is a flexible process that can take many forms, you can work with SharePoint Workspace in a number of ways:

- Create a SharePoint workspace to create a personal copy of the server workspace on your PC and store files you need to work on. If you use SharePoint Server 2010, this enables you to take your content offline and synchronize it again later.

- Create a Groove workspace to collaborate with team members (who may or may not have access to SharePoint Server 2010) so that you can share files, folders, discussions, and more.

- Create a shared folder in your workspace so that you can give other users or computers access to the files stored there.

SharePoint Workspace 2010 gives you the space to collaborate with your team easily and naturally. In your team workspace, you can share documents, have discussions, chat in real time, set appointments, leave notes for each other, and much more.

> **Note** SharePoint Workspace 2010 is available only in the Microsoft Office 2010 Professional Plus version. SharePoint Server 2010, which is required for the check-in and check-out features, will be available in the first half of 2010.

Starting Out with SharePoint Workspace 2010

When you first start SharePoint Workspace 2010 from the Windows Start menu, the Launchbar opens on the left side of the window, along with a pop-up list displaying any unread files that have been added to the workspace since you last logged in. (See Figure 9-1.) The Launchbar lists any workspaces you currently belong to and also enables you to view and work with your Contacts list.
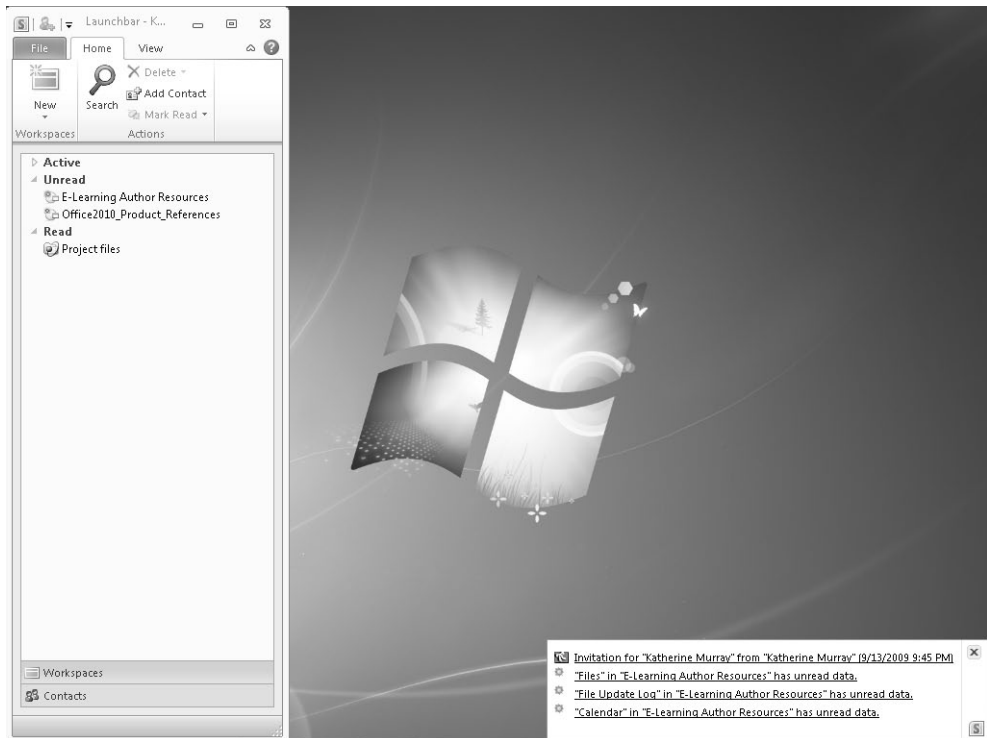

FIGURE 9-1 SharePoint Workspace also lets you know if your workspaces have any unread files.

To display a workspace, double-click the name of the workspace in the Launchbar. The workspace window uses the familiar Ribbon you see in other Office 2010 applications. (See Figure 9-2.) The default tabs include the File, Home, Workspace, and View tabs.
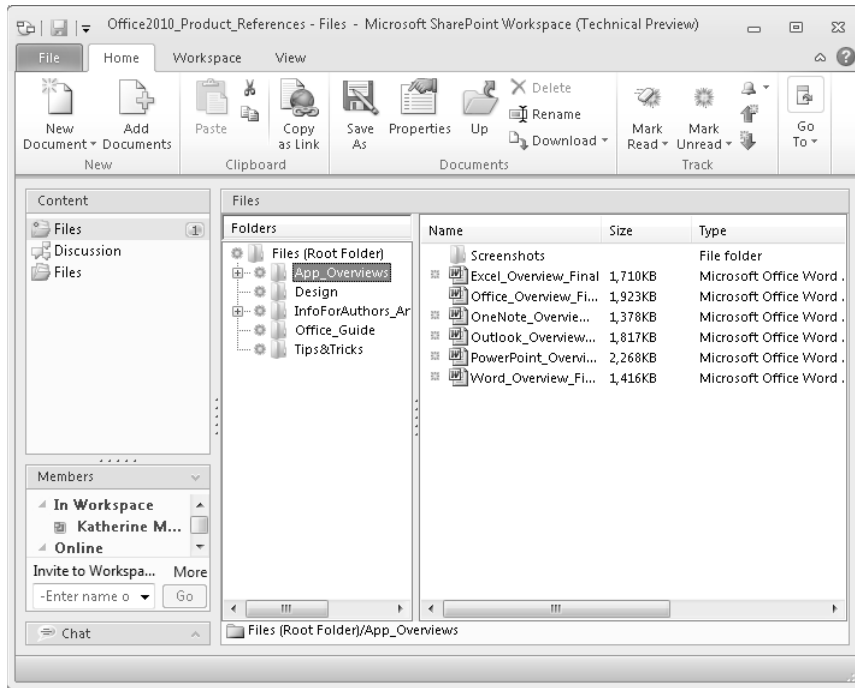
FIGURE 9-2 The SharePoint Workspace 2010 window gives you what you need to work collaboratively with your colleagues.

The work area is divided into three areas. On the left side of the work area is the Content panel, where you can choose the type of content you want to view in the space. The Content area might show Files, Meetings, Calendar, Discussion, Notepad, Pictures, or other categories, depending on the features that are used in the workspace.

> **Tip** You can add tools to the Content area by clicking the Workspace tab and clicking Add in the Tools group.

What About Groove?

If you used Microsoft Office Groove in Office 2007, you are already familiar with the workspace concept and know how it can be used to collaborate with team members far and near. In Office 2010, Groove has been renamed as SharePoint Workspace 2010, so you'll find similar functionality with some major improvements.

You can still create Groove workspaces in SharePoint Workspaces 2010 so that you can collaborate with team members who don't have access to SharePoint Server.

And now, with SharePoint Server 2010, which will be available in the first half of 2010, you will be able to download the files or folders you need so that you can work on files while you're offline and then synchronize the file versions when you connect to the server once again.

Step by Step: Adding a Workspace

You can create a SharePoint or Groove workspace easily from the Launchbar. Here's how:

1. In the SharePoint Workspace 2010 Launchbar, click New in the Workspace group of the Home tab.

2. Choose one of the following options:

   - SharePoint Workspace, which creates a workspace on your computer that enables you to download files from the SharePoint Server and work on them offline

   - Groove Workspace, which creates a classic Groove workspace so that you can save files and work collaboratively with your team

   - Shared Folder, which enables you to create a new folder you can share with others

3. If you selected SharePoint Workspace, enter the server location of the space you want to copy, as shown here:
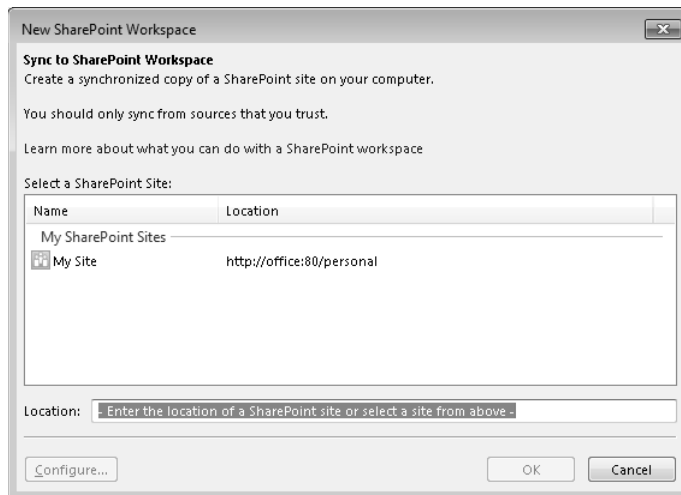
4. If you chose Groove Workspace, click Options and make sure 2010 is selected in the Workspace Version field (as shown here). Click Create.

New Groove Workspace

Name: New Workspace

Workspace Version: 2010

<< Options   Create   Cancel
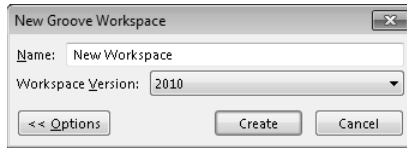
5. If you chose Shared Folder, enter a name for the new folder and click OK. In the Select A Folder For Sales Report dialog box, choose whether to create the folder on your desktop, in another location you specify, or to use an existing folder. After you make your choice, click OK.

Tip SharePoint workspace synchronizes only your changes, which means the entire file doesn't need to be copied each time you sync your files, which saves time and preserves bandwidth.

Setting Workspace Preferences

Backstage view in SharePoint Workspace 2010 provides you with various ways to set the preferences for different program features. (See Figure 9-3.) The Info tab enables you to choose your preferences for the following elements:

■ Change Online Connection Settings lets you choose the way the various workspaces and communication options in your workspaces are synchronized. You can also choose to pause the workspace or work offline.

■ Alert Me To Workspace Changes enables you to customize the way in which your workspace alerts you when changes are made to the site. You can set the Alert level, review roles and permissions, and set download preferences.

■ Manage Account Settings makes it easy for you to set account preferences, including whether you want SharePoint Workspace to launch when Windows starts up, how you want your online presence to be displayed, and how you want folders to be synchronized.

■ Manage Messages And Contacts displays your message history, including all messages you've sent and received, and it enables you to work with all contacts who have access to the workspace.
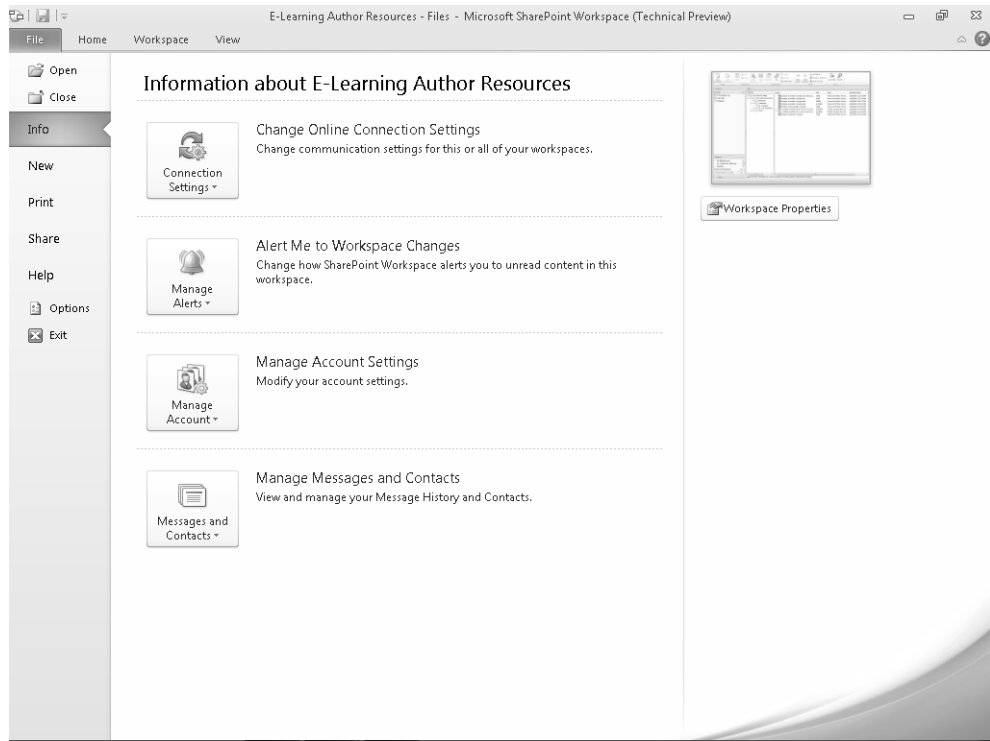
FIGURE 9-3 Use Backstage view to set your workspace preferences.

Accessing Your Files Seamlessly

One of the great new features SharePoint Workspace 2010 offers is transparency. Now when you use SharePoint Workspace 2010, you can open the files in your SharePoint and Groove workspaces as easily as you open a file on your desktop.

To move directly to your workspace folders without launching SharePoint Workspace 2010, click the Windows Start button and click your user name. Locate the Workspaces folder, as shown in Figure 9-4. Open the Workspaces folder by double-clicking it and then move directly to your workspace to find the files you need.
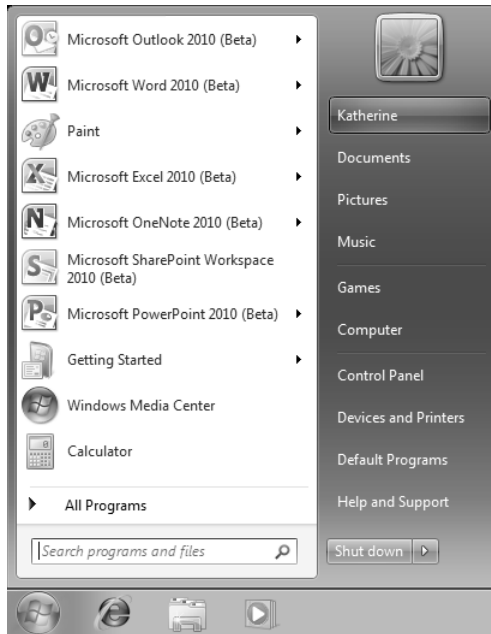
FIGURE 9-4 You can access your workspace files from the folders on your computer.

Simplified Searching

Another natural integration between your SharePoint and Groove workspaces occurs in the indexed Windows search function on your computer. Now when you search for a word or phrase by clicking the Windows Start button and typing the phrase in the Search field, the list of results displays any results found in the files in any of your workspaces. (See Figure 9-5.)

Tip You can synchronize any shared folder on your computer simply by right-clicking the folder and clicking Shared Folder Synchronization. Choose the Start Synchronizing option from the menu to begin the process.

Results from a shared folder in SharePoint Workspaces 2010
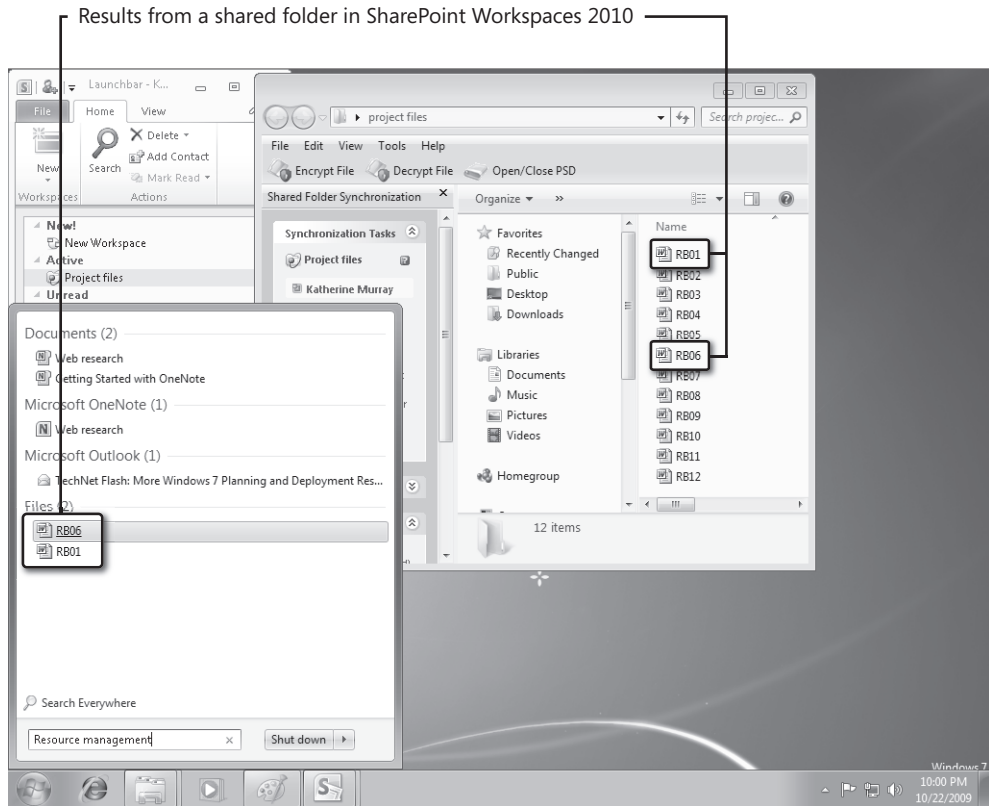
FIGURE 9-5 The indexed search feature includes results from your SharePoint and Groove workspaces.

Checking Files In and Out

Keeping your files straight is one of the challenges of working with other authors on shared documents. SharePoint Workspaces 2010 enables you to check files in and out of SharePoint Server 2010 so that you can ensure that your work isn't being duplicated—or overwritten— by others working on the same file.

> **Note**   To use the check-in and check-out features, you must have access to SharePoint Server 2010, which will be available in 2010.

You can work with files easily in SharePoint Workspace 2010 by clicking Files in the Content pane and then selecting the file you want to check out or in. In the Home tab, click Check Out or Check In. The file is marked so that other users on SharePoint Server will see the availability of the file and, if it is checked out, be blocked from accessing it.

When you check the file back in, your changes are synchronized and the file is made available to your teammates once again.

> **Tip** You can move back to the original SharePoint Server site by clicking the breadcrumb trail in SharePoint Workspace 2010. This gives you instant access to folders, files, libraries, and other assets on the server site.

Synchronize Your Data from SharePoint Server to Your Workspace

If you want to save files or folders to your PC-based workspace so that you can work on them whenever and wherever you choose, you can download the content from SharePoint Server 2010. Simply open your SharePoint Server 2010 site, click Site Actions, and choose the Sync To Computer option. Click OK in the SharePoint Workspace 2010 dialog box to begin the download.

Connecting with Your Team Instantly

The Groove workspace you create in SharePoint Workspaces 2010 enables you to share files, discuss projects, plan meetings, and much more. With a Groove workspace, you can work collaboratively without having access to SharePoint Server 2010.

You can display and work with contact information in two different places in your SharePoint and Groove workspaces. In the Launchbar, you can click Contacts at the bottom of the display to display all Active, Online, and Offline contacts who have access to the current workspace. In a workspace, scroll through the Members areas in the bottom left corner of the window.

You can tell which contacts are currently online by the small presence icon that appears to the left of the contact's name. A green icon indicates that the member is online; yellow indicates that the member is busy; red means the contact is unavailable. If a presence icon is gray, the contact is not currently online.

When you find a member you want to contact, click the person's name to display a contact card. By default, a small contact card appears, as you see in Figure 9-6. You can expand the

contact card to show more information—including department, phone numbers, and other relevant information such as organization and workspace roles—by clicking the Expand Contact Card button in the lower right corner.
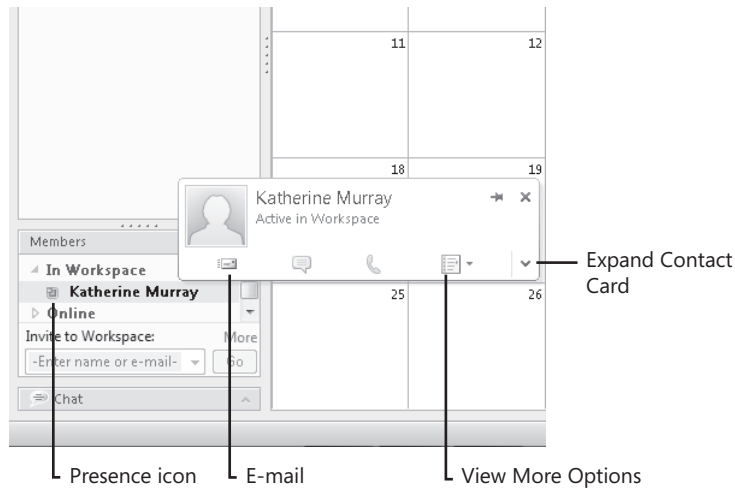

FIGURE 9-6 The contact card initially shows a select group of contact options, but you can expand the card to show more information.

The different option tools in the contact card enable you to send the contact an e-mail message, begin an instant message session, make a phone call, or set up a meeting. Additionally, with Office Communicator 2007 R2, you can share video, share your desktop, and send files.

You can also open an instant messaging window by double-clicking the contact's name in the Members list. You can send the message to one or many team members and attach files to the message if you like. (See Figure 9-7.)
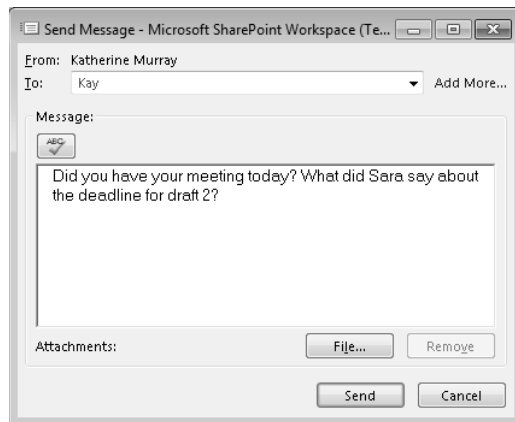
FIGURE 9-7 Send an instant message to one of your contacts online in the current workspace.

> **Note** To see the online presence and social contact information of others on your team, you need to be using Office Communicator 2007 R2.

SharePoint with InfoPath and SharePoint Business Connectivity Services

SharePoint Server 2010 makes it simple for you to work with the variety of business applications and services you need on a daily basis—and to do that naturally, online or offline. Now SharePoint Server 2010 supports InfoPath forms, which means you can add, delete, or edit data and data records on your forms and trust that they will sync automatically with the forms and data on the server.

Additionally, users who use SharePoint Business Connectivity Services can count on using line-of-business data in SharePoint and know that it will synchronize seamlessly with both their line-of-business system and SharePoint Server.

For both InfoPath and SharePoint Business Connectivity Services, after the data is synchronized, the information will also be available in SharePoint Workspace 2010.

Using SharePoint Workspace on the Go

SharePoint Workspace 2010 will also be available in a mobile counterpart (sold separately from Office 2010) after the final release of Office 2010. With SharePoint Workspace Mobile 2010, you will be able to open your workspaces, look through your files and folders, and review and modify your files in a special Office screen designed for your smartphone.

After you view, edit, and save your documents, you can easily sync them back to the server with a single touch on your phone. This process makes it easy for you to work with your workspace files anywhere and anytime you need them.

Chapter 10
Create Effective Marketing Materials with Publisher 2010

In this chapter:

- Starting Out with Publisher 2010
- Creating and Using Templates and Building Blocks
- Creating Precise Layouts
- Enhancing Typography with OpenType Features
- Working with the Improved Color Palette
- Previewing and Printing Publications
- Preparing for Commercial Printing
- Sharing Publisher Files

How do you create your marketing materials today? If you are spending a big portion of your budget outsourcing four-color postcards, brochures, newsletters, and more, you can do the job closer to home with Publisher 2010 and save money, time, and effort. What's more, you can create and save reusable content—called building blocks—that you can insert in future materials, which helps you ensure that your messaging stays consistent no matter what kinds of materials you create.

Improvements in Publisher 2010 make it easier than ever to create new files using both built-in and community-submitted templates. New layout tools help you align objects, place captions, and position elements on the page in accurate and aesthetically pleasing ways. You can also spruce up your photos with artistic effects, improved editing tools, and support for OpenType features such as ligatures and stylistic sets.

Starting Out with Publisher 2010

The Microsoft Publisher 2010 window gives you plenty of room to work on screen, while keeping the tools you need within reach. (See Figure 10-1.) The Ribbon includes seven tabs—File, Home, Insert, Page Design, Mailings, Review, and View—and each tab contains groups of tools related to the tab topic. On the Insert tab, for example, you'll find Picture in the Illustrations group, enabling you to add pictures to the current page with just a few clicks of the mouse.
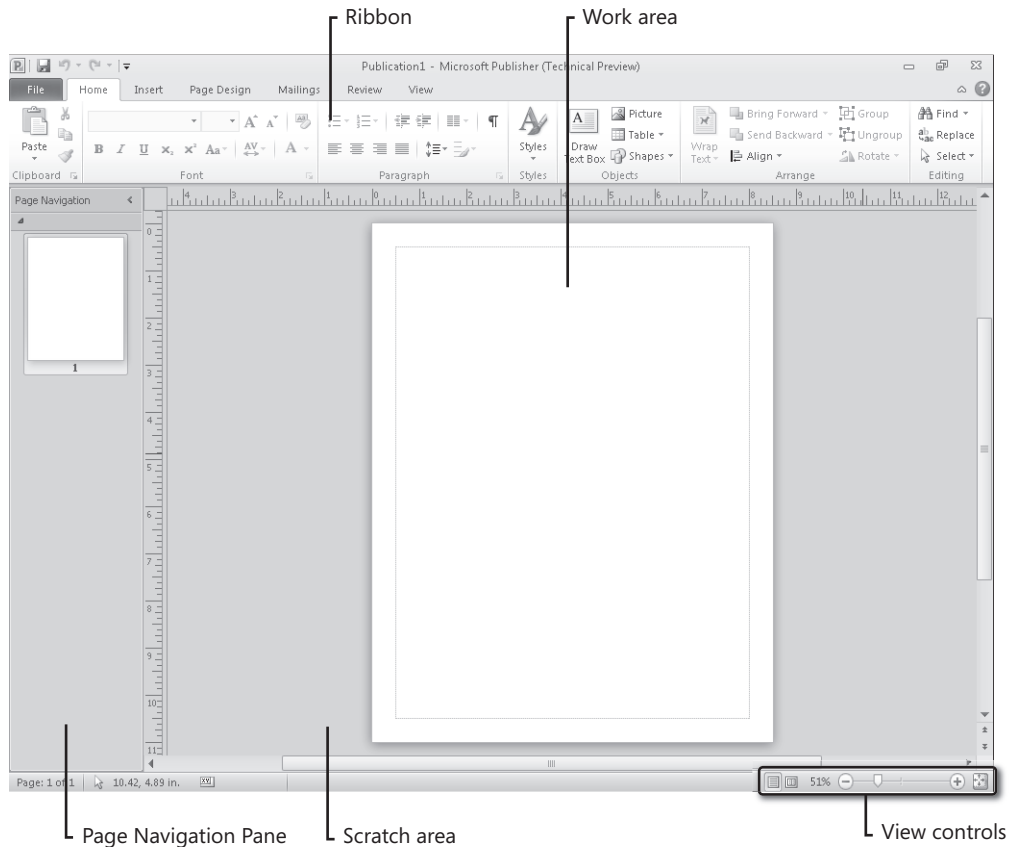
Ribbon   Work area

FIGURE 10-1 The Publisher 2010 window includes the Ribbon and the Page Navigation pane.

The Publisher window also includes a scratch area surrounding the entire publication. The scratch area enables you to place objects partially off the page so that you can create bleeds (photos, backgrounds, or other graphical elements that print all the way to the edge of the page). In Publisher 2010, you can choose to hide or display the scratch area so that you can see the overall design, including bleeds, as well as the page as it will appear when printed.

Collapse and Expand Page Navigation Pane

The Page Navigation pane along the left side of the window displays thumbnails of the pages in the current document, which enables you to get a sense of the document flow and over-all layout at a glance. You can use the Page Navigation pane to scroll through the different pages in your document, checking text flow, placement of illustrations, format of headings, and other parts of the design.

If you want to increase the amount of space available for the current page, you can collapse the Page Navigation pane, which reduces the size of the displayed thumbnails. To expand the pane, simply click the Expand button at its upper-right corner.

Use the Mini Toolbar

Now Publisher 2010 also includes the Mini Toolbar, a set of text-formatting tools that appears when you select text in your document. When the Mini Toolbar first appears, it is transparent; when you point to the toolbar it becomes solid, as Figure 10-2 shows. If you move the mouse pointer away from the toolbar, it disappears altogether. In this way, the tools are within reach if you need them, but they fade away if you don't.
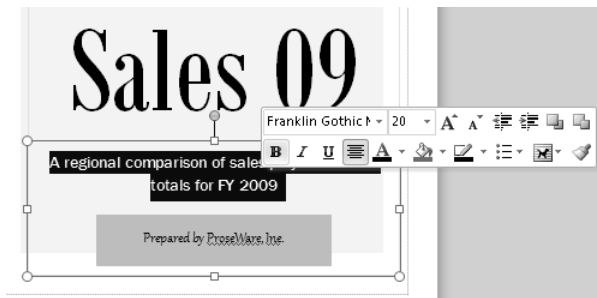
FIGURE 10-2 The Mini Toolbar displays formatting tools when you select text.

> **Tip** If the Mini Toolbar doesn't appear automatically when you select text in your document, you can turn the feature on by clicking File and choosing Options. On the General tab, click the Enable The Mini Toolbar option.

Creating and Using Templates and Building Blocks

Publisher 2010 offers dozens of built-in templates you can use to create letters, newsletters, brochures, business cards, calendars, labels, and much more. When you choose to create a new publication based on a template, you can use one of the templates installed with the software or access templates available online in the Publisher community. (See Figure 10-3.)

In addition to using templates to start your publication, you can add predesigned elements to your pages by choosing from a gallery of page parts, known as building blocks. Building blocks are available in the Page Parts tool in the Building Blocks group of the Insert tab. (See Figure 10-4.)
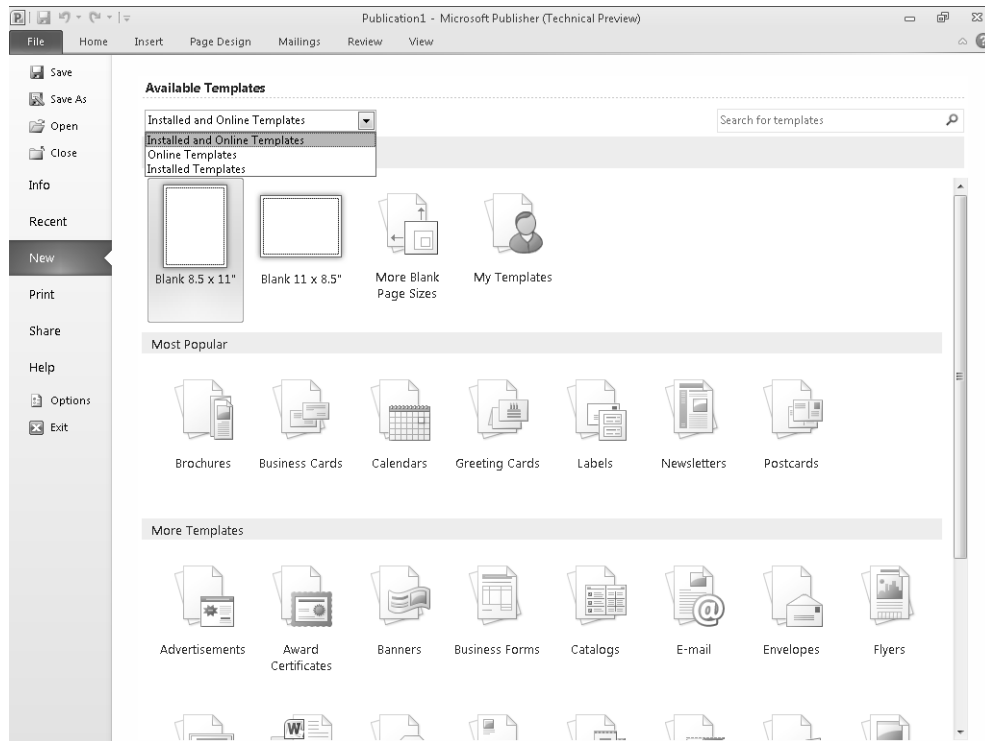
FIGURE 10-3 You can choose to begin a new publication based on an installed or online template or create your own design on a blank page.

Tip A *building block* is a part of a page that you might want to use regularly in your publications.

By default, Publisher includes headings, pull quotes, sidebars, and stories in the Page Parts gallery of the Building Blocks group on the Insert tab. You can insert the building blocks as they are and then customize them to fit your publication, or you can create your own Page Part and then save it as a building block. Either way, the building blocks feature can save you time and effort and help you provide a consistent look and feel among the various publications you create.
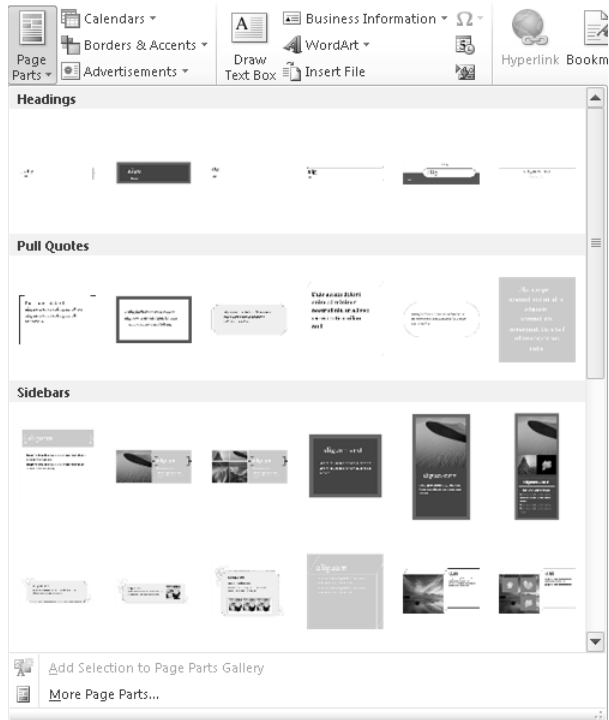
FIGURE 10-4 Page Parts can save you time and add a professional touch to your page design.

Step by Step: Creating a Building Block

Here's how to create a new building block in Publisher 2010:

1. Open the Publisher document you want to use.

2. Create and select the element you want to save as a building block. *Hint*: You might want to save a page heading, report title, pull quote, table, or other often-used element.

3. Right-click the element you selected and choose Save As Building Block.

4. In the Create New Building Block dialog box, shown here, enter a title and description.
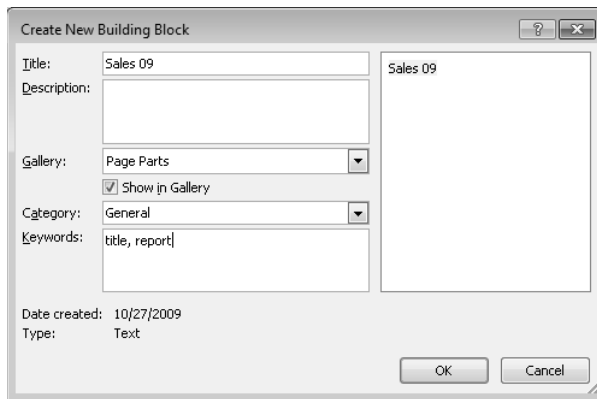
5. Click the Category arrow, and choose the category that best applies to the type of element you've created.

6. Click OK to save the building block.

Creating Precise Layouts

Publisher 2010 also includes dynamic layout guides to help you position elements precisely on the page. Guides appear automatically as you drag an object—text, picture, or shape—on the page. Turn on the display of guides by clicking Guides in the Show group of the View tab.

Vertical and horizontal guides help you ensure you're positioning elements so that they align with other objects on the page. Guides appear and disappear as you drag the object so that they take up space on-screen only in the areas where you need to use them. (See Figure 10-5.)
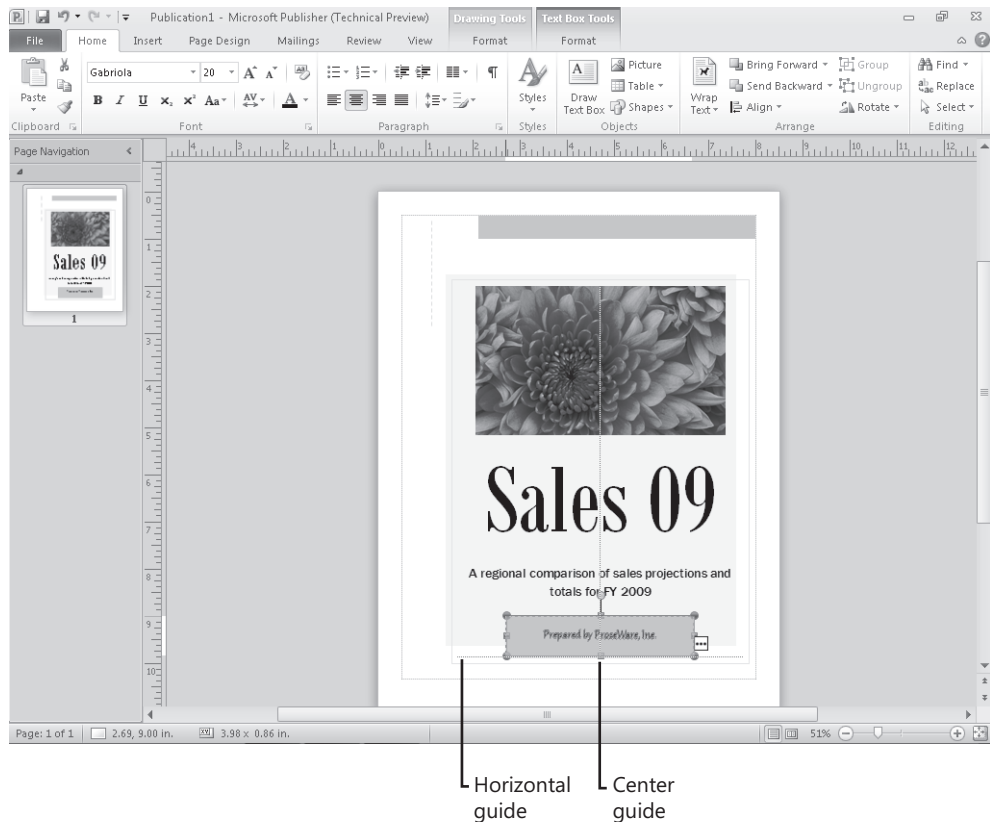
FIGURE 10-5 Publisher 2010 provides dynamic guides that help you place objects on the page.

Enhancing Typography with OpenType Features

Both Publisher 2010 and Word 2010 are now able to make use of OpenType features such as ligatures and stylistic sets in the fonts that offer them. *Ligatures* are a combination of two letters shown typographically as a single character in some fonts. For example, the letters

fi in some typefaces are placed close together and shown as a single character. This type of text control is used most often in high-quality typography work.

Similarly, stylistic sets offer a variety of appearances in the selected font. The Typography tools are found on the Text Box Tools Format tab, which appears when a text box is selected in your Publisher document. Figure 10-6 shows some of the stylistic sets available for the Gabriola font.
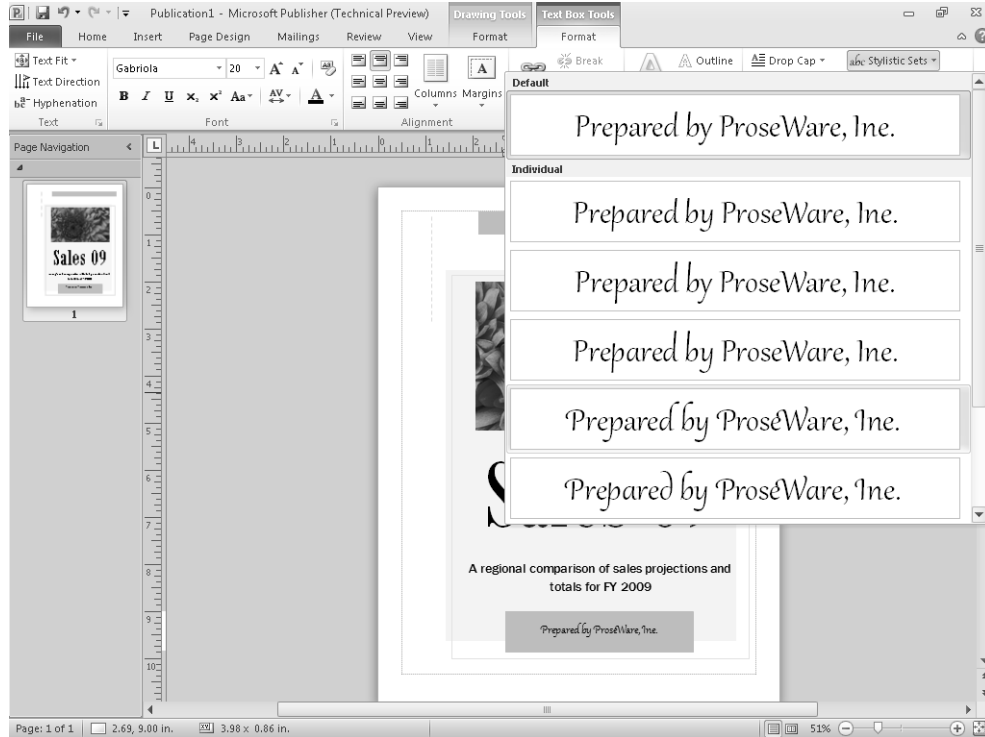

FIGURE 10-6 Publisher 2010 enables you to take advantage of professional typography features available with some OpenType fonts.

In addition to ligatures and stylistic sets, Publisher 2010 also supports number styles, stylistic alternates, and swash features. Figure 10-7 shows the primary Typography tools, and Table 10-1 provides a description of each one.
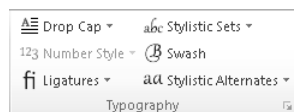
FIGURE 10-7 Publisher 2010 offers different OpenType features you can apply to fonts that support them.

TABLE 10-1 Typography features in Publisher 2010

Tool	Description
Ligatures	Enables you to choose whether to use ligatures in the document (and, if so, what kind)
Number Style	Sets the appearance of numerals in the selected font in the current document
Stylistic Alternates	Offers alternate characters you can use in the text in your document
Stylistic Sets	Displays a gallery so that you can choose the format style of the selected font
Swash	Works as a toggle, and turns on or off decorative text elements

> **Tip** Publisher 2010 also includes Paste with Live Preview, which enables you to preview the way an object will look before you paste it in your Publisher document.

Working with the Improved Color Palette

Publisher 2010 updated its color palette to include elements that help you keep a consistent look and feel throughout the materials you create. Now you can stay true to the color scheme you selected and apply a variety of tints, shades, and gradients to the text and shapes on your pages. You'll find the new palette on all border and fill tools—for example, Figure 10-8 shows the color palette that appears when you click the Shape Fill tool in the Shape Styles group of the Drawing Tools Format tab.
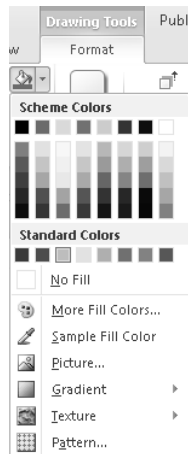

FIGURE 10-8 The improved color palette now displays color scheme selections and expanded color choices.

Previewing and Printing Publications

The Print feature in Publisher 2010 now enables you to preview, adjust, and print all in the same screen in Backstage view. (See Figure 10-9.) When you click the File tab and click Print, you see the current page of your open publication, complete with the page margins, headers and footers, and more. You can easily choose the print options you need—for example, select the printer you want to use, choose the print layout and paper style, and select whether you want to print as an RGB color publication or a composite black and white.
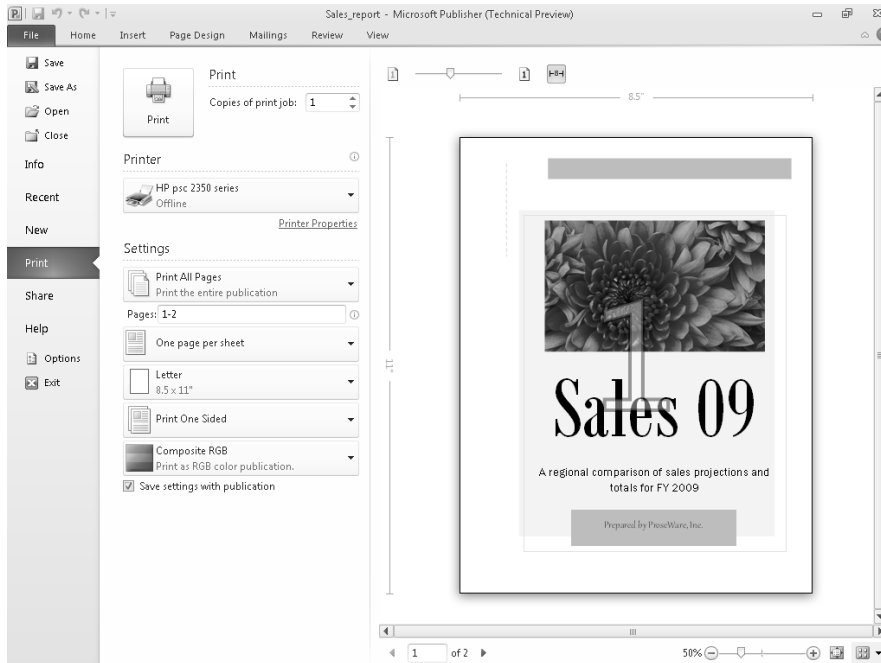
FIGURE 10-9 The Preview And Print interface in Publisher 2010 enables you to make last-minute changes and print, all from the same screen.

Have you ever printed a double-sided report only to find out that the image on the back of the page made the text on the front hard to read? Publisher 2010 includes a backlight feature that enables you to see through the page on double-sided publications so that you can avoid that kind of situation in the future. When you choose two-sided printing in the print options, the Decrease Transparent View and Increase Transparent View tools appear at the upper-right corner of the preview window. (See Figure 10-10.) To change the transparency and display the back of the page while you're looking at the front, drag the Transparency slider to the right. You can also turn the page and view the transparency from another perspective using the Front and Back tools at the bottom of the preview area.
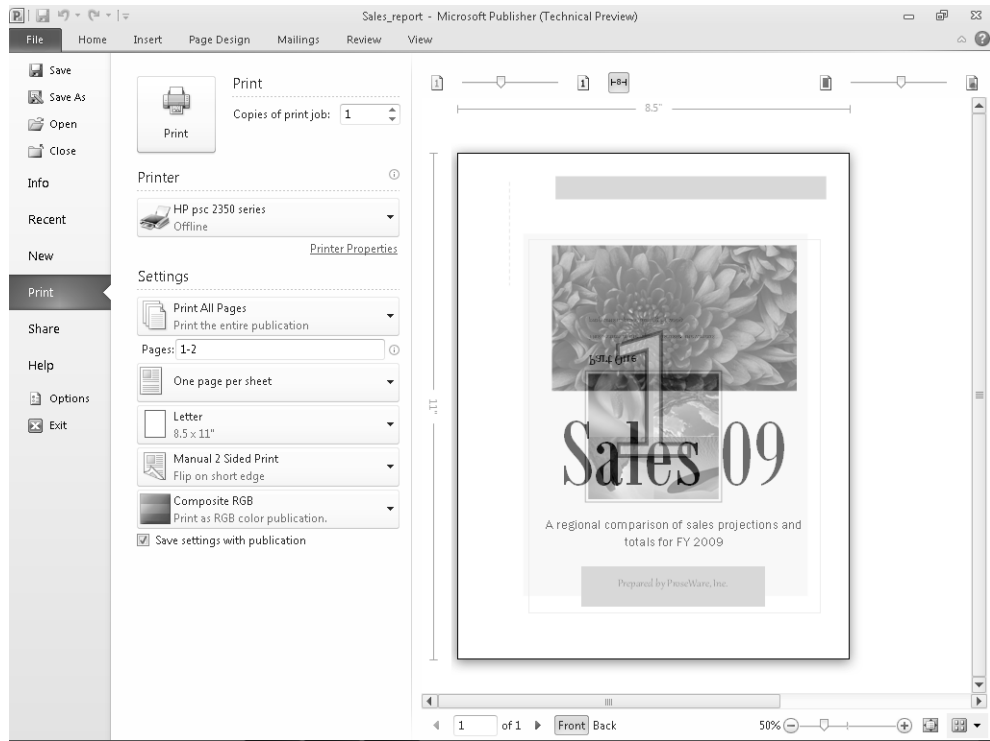
FIGURE 10-10 The Transparency tools become available when you choose two-sided printing.

Tip Before you finalize your design, be sure to run the Design Checker to identify and correct design problems in the publication. You'll find the Design Checker on the Info tab of Backstage view.

Preparing for Commercial Printing

Publisher 2010 includes expanded support for the four-color process and spot color printing, including CMYK composite postscript and Pantone colors (both PMS and the new Pantone GOE color system). You'll find the tools you need to prepare a file for commercial printing by clicking the File tab to display Backstage view. Click Info, and click Commercial Print Settings.

Commercial Print Settings enables you to choose the color model you want to use, work with the embedded fonts in your publication, and manage the registration of the document. (See Figure 10-11.) When you're ready to finalize the file, click File and in Backstage view, click Share and choose Save For A Commercial Printer.
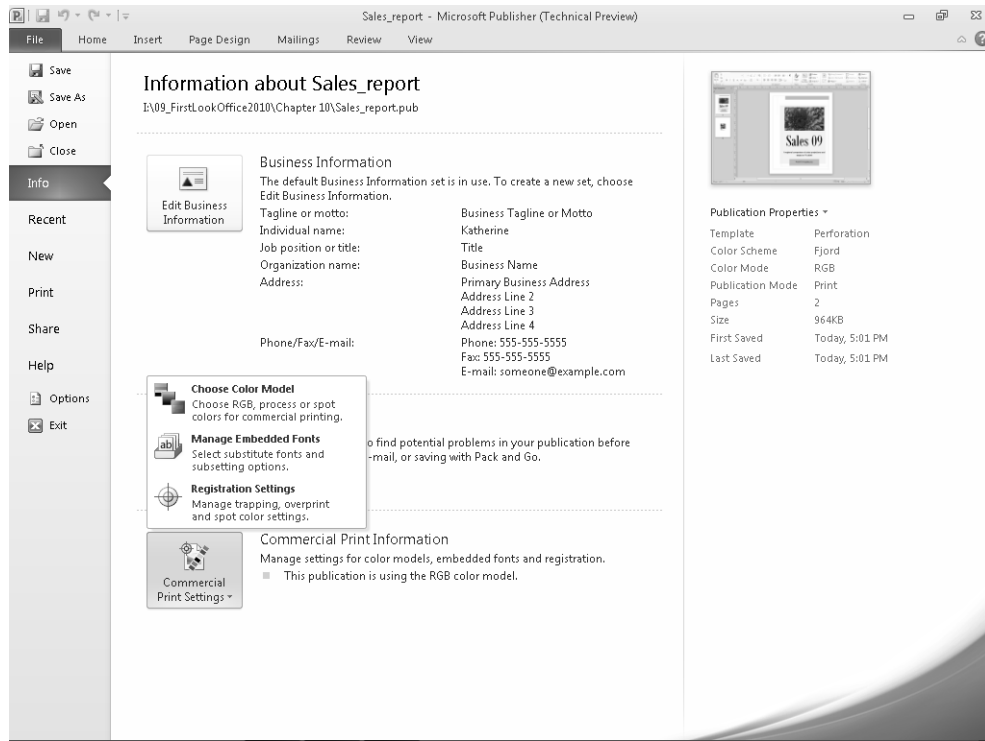
FIGURE 10-11 Commercial Print Settings enable you to prepare your publication for professional printing.

Sharing Publisher Files

You can share the files you create in Publisher 2010 in various ways. You can e-mail pages from within Publisher, create a PDF/XPS document, publish the document as HTML, save the piece for a commercial printer, or save the publication for another computer. You'll find these options in the Share tab of Backstage view.

> **Tip** Before you send your Publisher document by e-mail, you can preview it by clicking File to display Backstage view and choosing Share. Click E-mail Preview to display a version of the document as it will appear to the recipient.

Chapter 11
Make Sense of Your Data with Access 2010

In this chapter:

- Starting Out with Access 2010
- Using Application Parts
- Applying Office Themes
- Adding New Fields
- Showing Data Bars and Conditional Formatting
- Creating Navigation Forms
- Designing Access 2010 Macros
- Working with Access 2010 and the Web

Whether you work daily with large, sophisticated databases or occasionally create small data tables to meet a specific need, Microsoft Access 2010 enables you to gather, organize, analyze, report on, and share your data easily and effectively. New and improved features in Access 2010 simplify the steps to creating a database by enabling you to add application parts that include ready-made tables and forms. You can also use Quick Start fields to insert commonly used fields and add calculated fields to build data analysis directly into your data tables.

On top of the simplified tasks involved in creating and analyzing your data, Access 2010 includes new data visualizations—including new data bars and improved conditional formatting—that can tell the story of your data at a glance. You'll also find plenty of Web support in Access 2010. With little effort, you can create a Web database and publish your data online so that it's always available at any point you have Web access.

Starting Out with Access 2010

The first thing you'll notice as you begin to work with Access 2010 is that the application has the friendly and familiar Office interface that is common to other Office applications you might use. The Ribbon includes five tabs—File, Home, Create, External Data, and Database Tools—that offer sets of tools organized according to the data tasks you'll be performing.

In addition to these five tabs, Access 2010 displays the Table Tools contextual tabs (Fields and Table) when you work with a data table. (See Figure 11-1.)
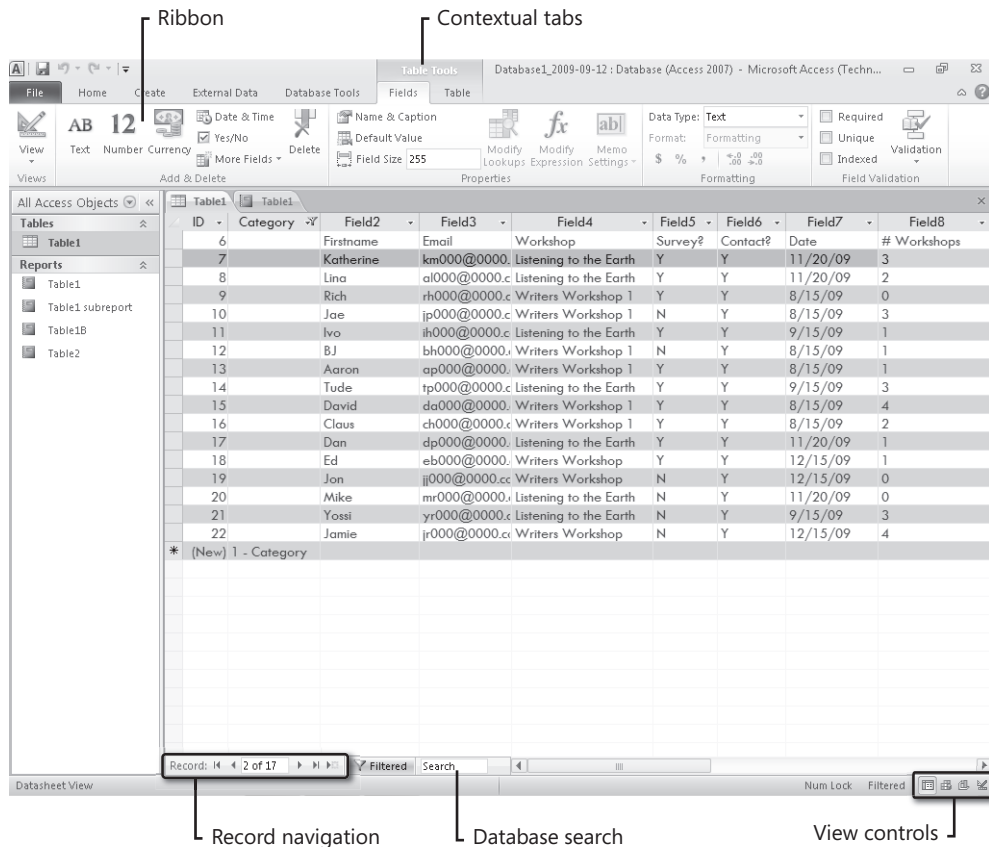

FIGURE 11-1 The Access window is designed to make it easy for you to work with the data objects and views you need.

Below the Ribbon, the Access window is divided into two main windows. The All Access Objects pane on the left side of the screen lists the various elements—tables, reports, forms, and more—in your current database. To open an object, you double-click it in the All Access Objects pane; the item then opens in the work area on the right side of the window. You can have many open objects in Access at one time, and you can change the current display by clicking the tab of the object you want to see.

Tip You can change the elements displayed in the left pane by clicking the arrow to the right of the pane heading. You can choose to display objects by category or by group. Click the option you want to display and the pane changes accordingly.

Along the bottom of the Access window you find controls that enable you to move through records in the current data table, search for information in the database, or choose the view you want to use to work with your data.

In addition to the flexible, easy-to-navigate user interface, Access 2010 offers behind-the-scenes features that help you manage your data files. Backstage view pulls together all the tools you need to create, share, and set preferences for the various files you create. (See Figure 11-2.)
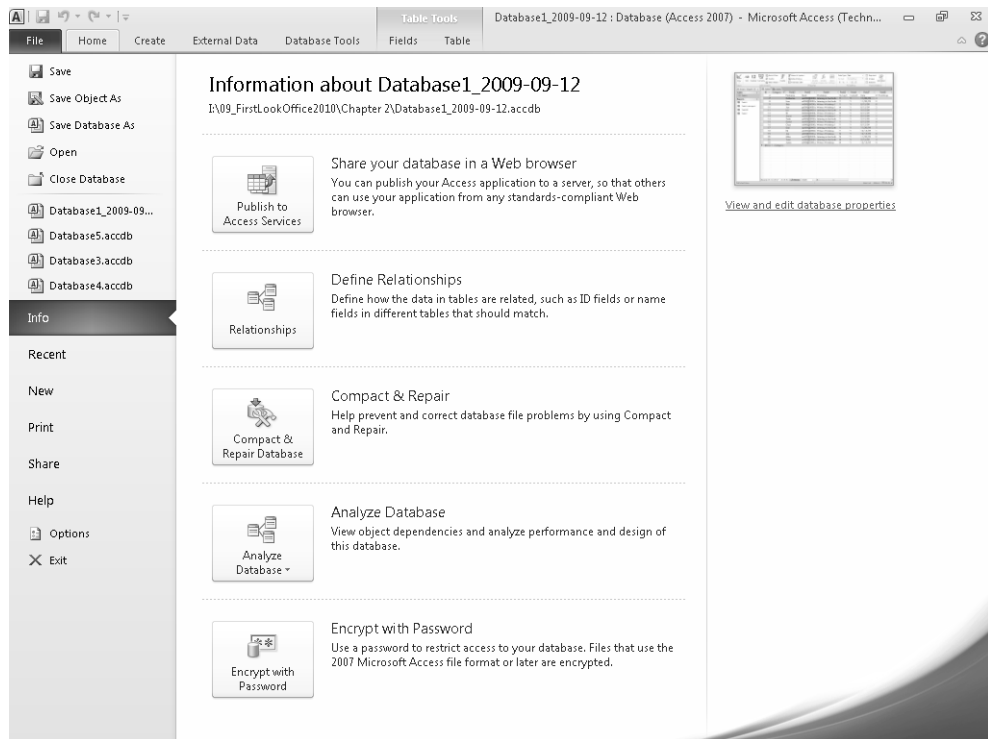

FIGURE 11-2 Use Backstage view to work with the files you create in Access 2010.

Using Application Parts

Designing every database you create from scratch takes a lot of time and effort, and now with Access 2010 there's no need to reinvent the wheel every time you create a new data table. Using the application parts in Access 2010, you can add ready-made forms and tables to your Access database. By default, Access 2010 includes a number of blank, predesigned forms as well as Quick Start tables (Comments, Contacts, Issues, Tasks, and Users) you can add to your database.

Step by Step: Adding an Application Part

Follow these steps to add an application part to your Access database:

1. Open the database you want to use.

2. Click the Create tab.

3. Click Application Parts. The gallery appears, as shown here:
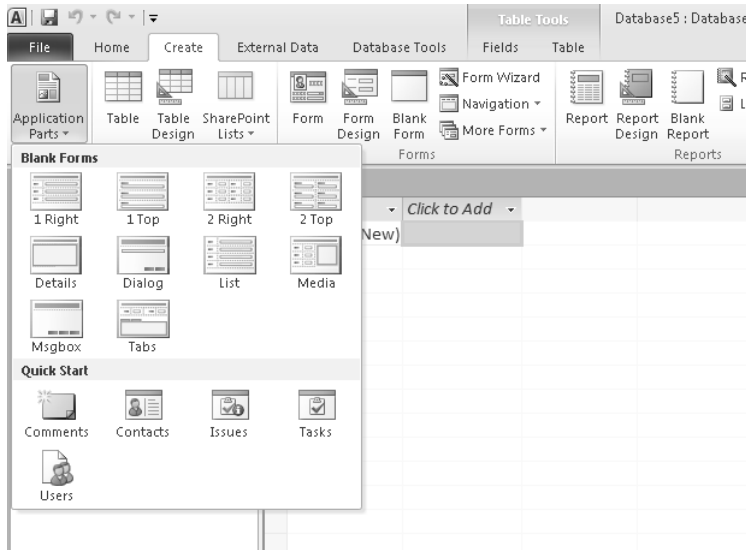
4. Click the application part you want to add to your database, and the form or table you selected is inserted in the All Access Objects pane on the left side of the work area.

Tip You can easily search for Access templates to use as the basis for a new database from Backstage view. Click File to display Backstage view and then click New. Click in the Office.com Templates box, and type a word or phrase indicating the type of template you'd like to find.

Applying Office Themes

Now you can apply the professionally designed Office themes—which include color scheme, font selections, and styles—to your forms and reports in Access 2010. (See Figure 11-3.) This level of consistency enables you to create a similar design for all the documents you create

in Office 2010. For example, suppose you're putting together a lengthy sales report that spotlights key products, provides sales data by region, and includes case studies showing the ways in which your products are being used by your customers. Using the same Office theme, you can prepare the case studies in Word 2010, the financial data in Excel 2010, and the sales reports by region in Access 2010.
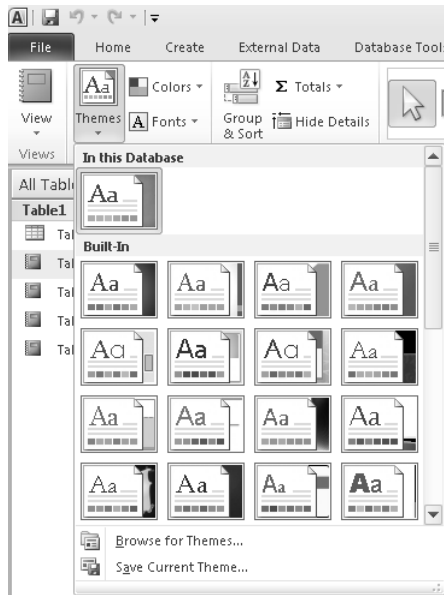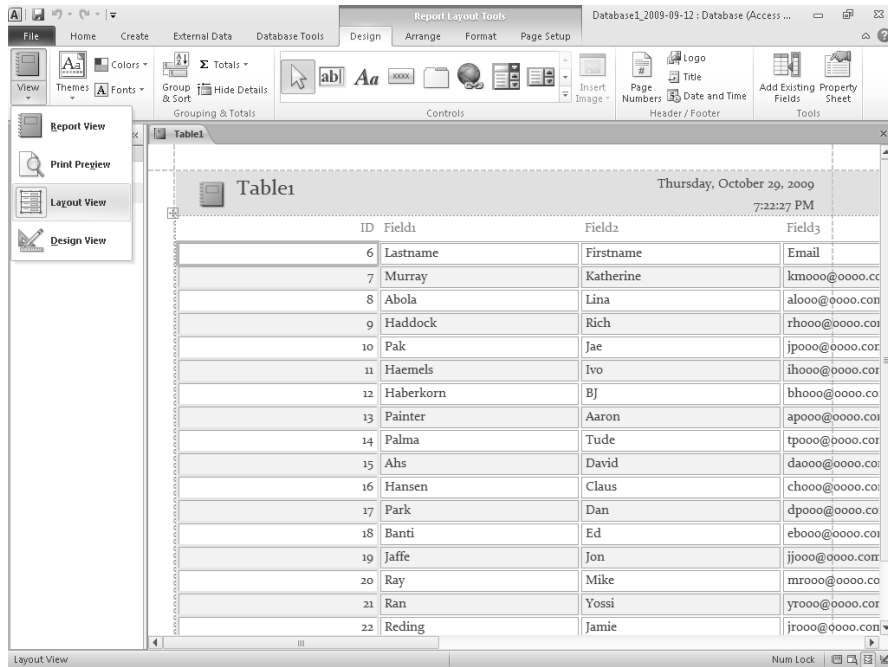

FIGURE 11-3 Office themes in Access 2010.

Step by Step: Applying an Office Theme

Here's how to apply an Office theme in Access 2010:

1. Open the database you want to use in Access.

2. Open the form or report to which you want to apply the theme.

3. Click the Home tab.

4. Click Views, and choose either Design View or Layout View.

5. In the contextual Design tab, click Themes in the Themes group.

6. Preview a theme by pointing to it; the report or form display shows you how the theme will look when it is applied to your data.

7. Click the theme you want to use, and it is applied to the form or report.

Adding New Fields

New field features in Access 2010 enable you to reduce the amount of time you spend setting common fields in your databases by using Quick Start fields, and they help you expand your data processing power by adding calculated fields to your tables.

Adding Quick Start Fields

New Quick Start fields in Access 2010 enable you to add fields you use regularly to your data tables with a simple click of the mouse. Instead of adding Address, City, State, ZIP, and Country codes one by one, for example, you can click the Address Quick Start field to add all the fields in one click. Access 2010 includes nine Quick Start fields by default: Address, Category, Name, Payment Type, Phone, Priority, Start And End Dates, Status, and Tag.

To add a Quick Start field to your data table, open the data table you want to use and click to select the field to the right of the place you want to add the field. In the Table Tools Fields tab, click More Fields in the Add & Delete group. Scroll down to the bottom of the list to find the Quick Start fields, and click the one you want to add to the data table. (See Figure 11-4.)
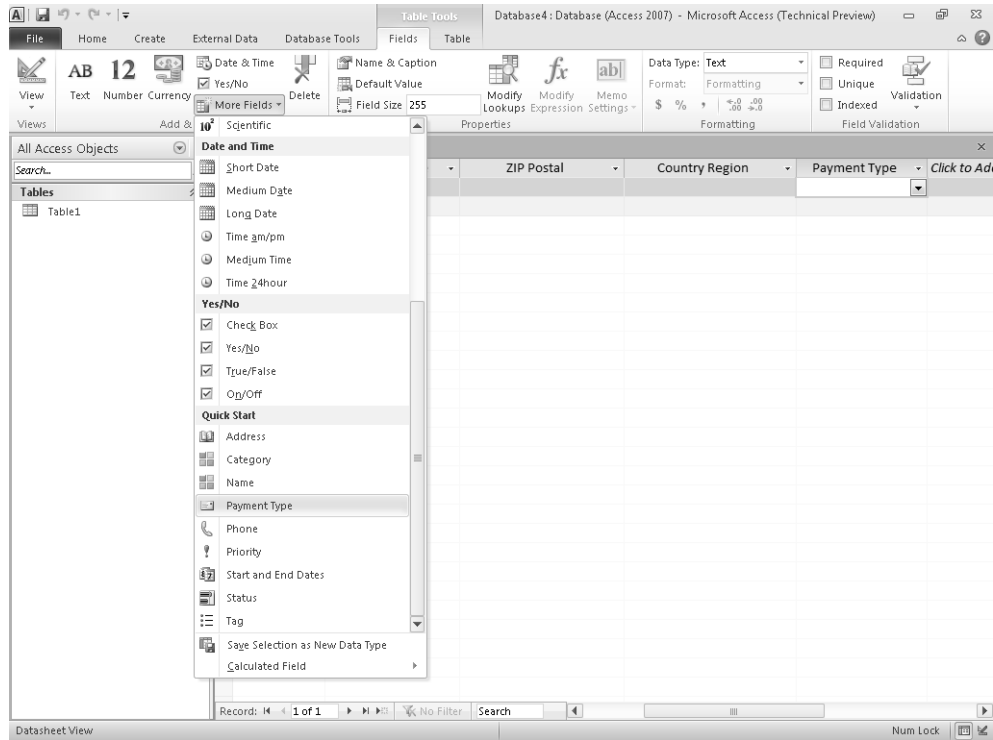

FIGURE 11-4   Find the Quick Start fields in the More Fields list.

Each Quick Start field you add has preset field options already included. For example, when you add the Payment Type Quick Start field, the added field includes Cash, Credit Card, Check, In Kind, and Debit selections as part of the field. You can customize the field to include the selections you want by right-clicking the field and choosing Edit List Items. In the Edit List Items dialog box (shown in Figure 11-5), you can modify, remove, or add values to the list by clicking and typing the new entry. Click OK to save your changes.

Tip What should you try first in Access 2010? Jeff Conrad, author of *Microsoft Access 2010 Inside Out (*Microsoft Press, 2010), recommends these three things:

- Publish and share your database to Access Services, and view your forms and reports in a Web browser.

- Try the new navigation form to see how simple it makes creating a navigation system.

- Attach data macros to table events, and create named data macros to incorporate more business logic in your data tables.
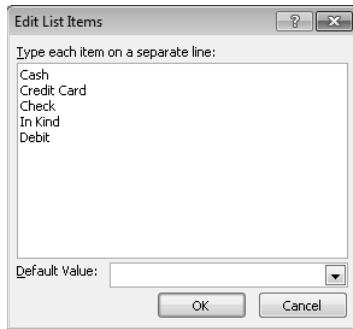
FIGURE 11-5 You can easily edit the list items included in a Quick Start field.

Inserting Calculated Fields

Another new field feature in Access 2010 enables you to easily create and store calculations that enable you to analyze your data. You can then apply the calculated field throughout your database as needed. To add a calculated field to your data table, click More Fields in the Add & Delete group of the Table Tools Fields tab. Then choose the field type for the type of calculated field you want to create, and Access 2010 displays the Expression Builder dialog box so that you can choose the elements, categories, and values to use in the calculation. (See Figure 11-6.)
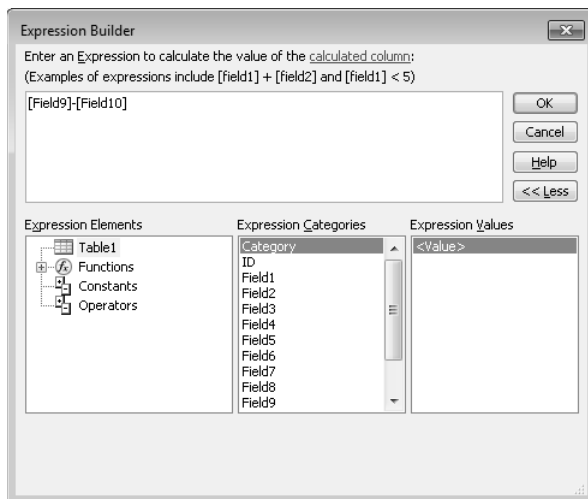
FIGURE 11-6 Add calculated fields to your data table.

Tip You can change the expression you've used to create a calculated field by right-clicking the field label in the data table and choosing Modify Expression. In the Expression Builder dialog box, modify the calculation as needed and click OK.

Showing Data Bars and Conditional Formatting

Not everyone can look at a table full of data and know instantly what it means. Some of us need a little help interpreting facts and figures in a table or on a report. For this reason, Access 2010 includes data visualization features that enable you to include data visualizations in your tables and reports that will help your readers understand what your data means.

Data bar visualizations are helpful when you want to compare data among the records in your report. For example, if you want to compare the projected workshop with the actual attendance data, you can let data bars show you where your marketing efforts were successful and where they fell short. (See Figure 11-7.)

FIGURE 11-7 Data bars work with numeric fields, enabling you to visually contrast the data you're reporting.

Tip Conditional formatting is easier in Access 2010, thanks to the addition of the Conditional Formatting Rules Manager. Now you can create new rules that specify conditions for the conditional formats and preview the effects of your changes before you apply them.

Creating Navigation Forms

When you're working with forms and reports in Access 2010, you can simply drag fields to where you want them to create just the type of layout you want. Access 2010 also includes a new Navigation Forms gallery, with a number of layouts you can customize to make it easy for others to find the forms and reports they want to view in your database.

To create a navigation form, click the Create tab and choose Navigation in the Forms group. (See Figure 11-8.) Click the navigation form layout you want to use, and then drag the re-ports and forms you want to include from the All Access Objects pane to the navigation area of the new form. Those reviewing your information will be able to click the name of the form or report to display the data in the Access 2010 window.
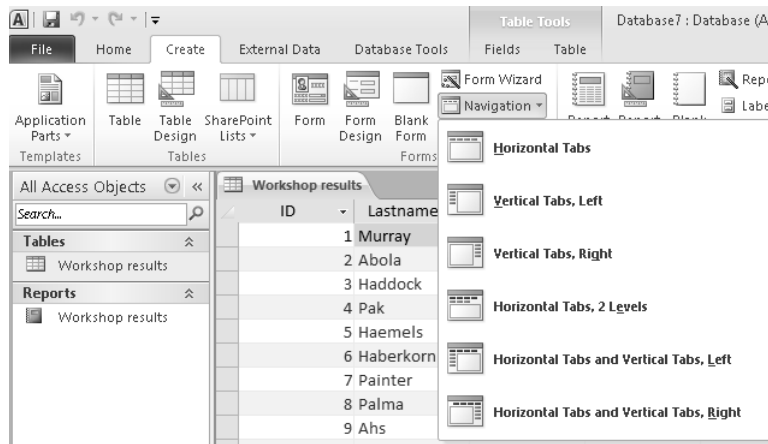

FIGURE 11-8 Use the Navigation gallery to choose the layout of the navigation form you want to create.

Designing Access 2010 Macros

Although the word *macros* might make your eyes glaze over if you're not interested in automating the data logic and processing in your database, two improvements in Access 2010 offer good news to macro aficionados. First, new data macros enable you to add data logic to the actual table of data rather than requiring you to work at a form level. And the enhanced Macro Designer is now more intuitive than ever, providing a look and feel that enables you to build macros easily by dragging items where you want them to appear and arranging them in the proper sequence. (See Figure 11-9.)
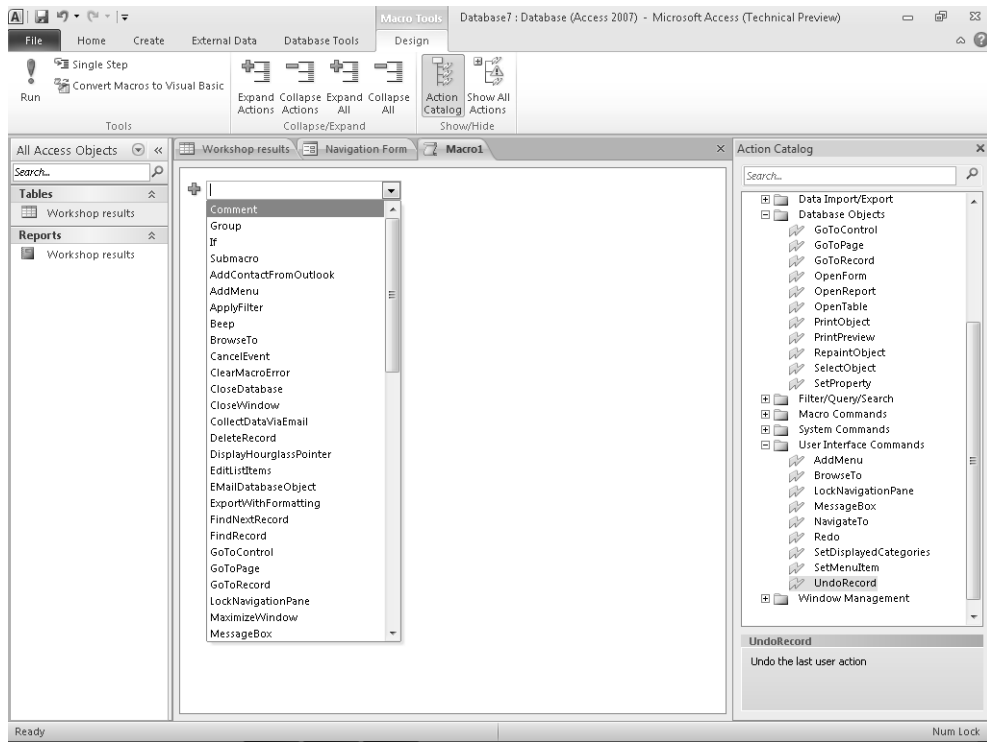
FIGURE 11-9 The improved Macro Designer in Access 2010 makes it easy for you to build macros by selecting and dragging the items you need to the location you choose.

Working with Access 2010 and the Web

One of the major stories in Office 2010 is the ability to access your files—documents, presentations, worksheets, notebooks, and databases—anywhere you have access to the Web. Access 2010 enables you to create a Web database so that you can use it with SharePoint Server 2010 to publish your entire database—including tables, forms, and reports—and view it in a browser window.

Create a Web database by starting in Backstage view. Simply click File, choose New, click Blank Web Database, and click Create. You can then create the database as usual, adding data tables, forms, and reports. When you are ready to publish your database to the Web, return to Backstage view by clicking File and then click Share. Choose Publish To Access Services, and type the necessary information for the SharePoint site that will post the file.

Tip Before you post your database to the Web, be sure to run the Compatibility Checker to look for any data items or settings that won't function properly online. The Compatibility Checker is found in the Share page of Backstage view.

Adding Web Controls

Another great Web feature included in Access 2010 makes it possible for you to incorporate Web content in the database you are creating. This might enable you, for example, to provide live access to Web 2.0 content from within your database.

Display the form on which you want to add the Web Browser control, and then, in the Home tab, click View and then Layout View or Design View in the Views group. In the Controls group, choose Web Browser, and then click and drag at the point you want the control to appear. When you release the mouse button, the Insert Hyperlink dialog box appears so that you can enter the Web page or choose the item you want to include in the Web Browser control. After the element is added, you can resize the object as needed in the Access window by simply dragging the corner or side of the object. (See Figure 11-10.)

Tip Now it is easier to add databases to your Trusted Documents list. When you open a database created by someone else, a Message Bar appears at the top of the Access 2010 window. Macros are automatically disabled until you indicate that the database is a Trusted Document. To enable the full functionality of the database, click Enable Content.
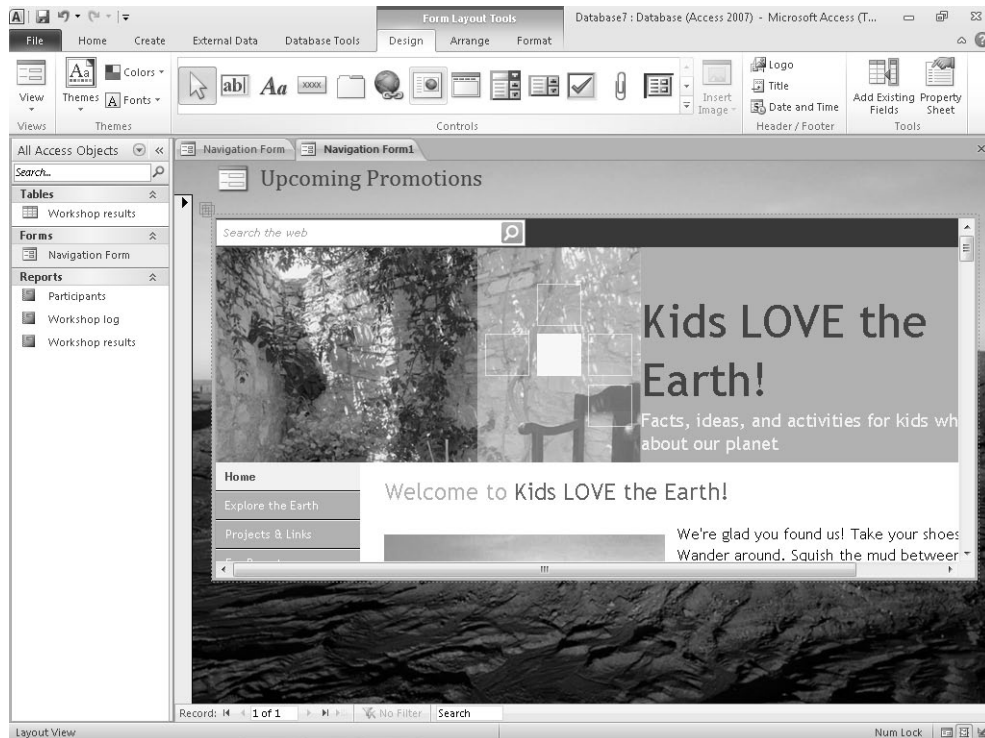

FIGURE 11-10 Incorporate Web content in your database using the Web Browser control in Access 2010.

Using Access 2010 with SharePoint

If you work with SharePoint Server 2010, additional Web features are also available to you in Access 2010. First, you can take a Web database into offline mode so that you can continue to work on the data as needed; the next time you connect to the Web, any changes you made to the offline data are automatically synchronized with the database on the server. You can also synchronize your data manually by clicking File to display Backstage view, and in the Info page, clicking Sync All.

You also have the ability to save your database to SharePoint Workspaces 2010 so that you can access your data using your Web browser or smartphone.

Gathering Data with InfoPath 2010

Microsoft InfoPath is a forms-creation and data-gathering tool included with Office 2010 that helps you collect and consolidate the data you need and then share that data with colleagues in a variety of ways. (See Figure 11-11.)
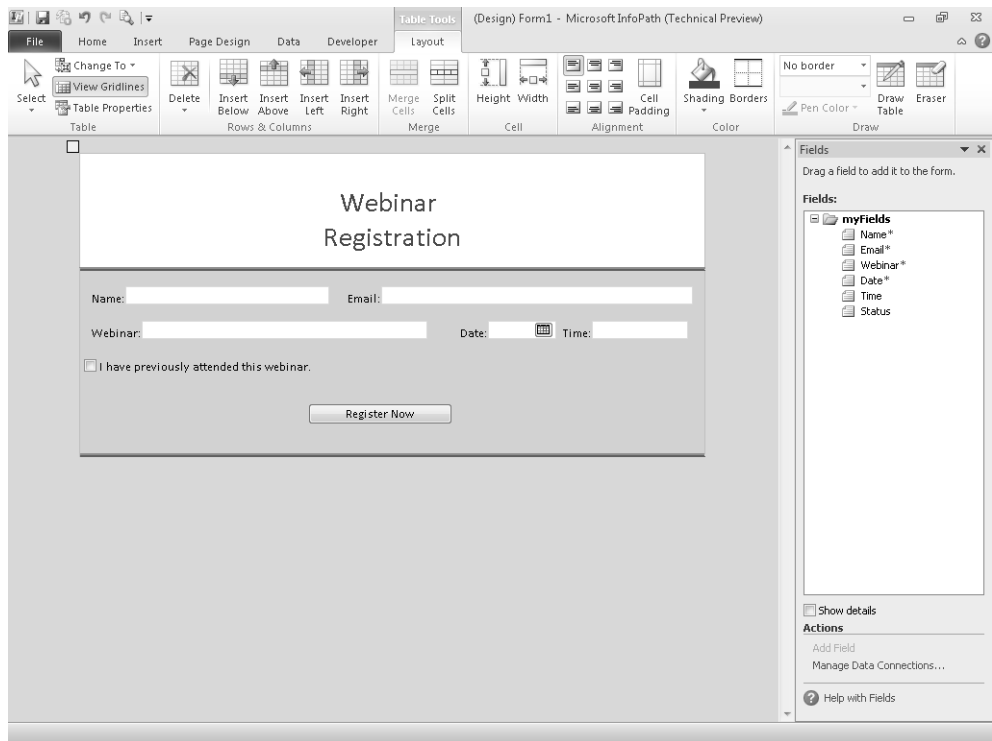

FIGURE 11-11 InfoPath offers a collection of templates you can use as the basis for your forms, or you can begin with a blank form and create your own.

InfoPath includes a variety of form templates you can use as the basis of the new forms you create, or you can choose to start with a blank form and add the fields yourself. InfoPath 2010 enables you to create professional forms by dragging fields where you want them to be and arranging them in a way that makes sense for your data. You can also add pictures and buttons to your forms, guarantee accuracy by running the Spell Checker, include ScreenTips to prompt people filling out your forms, and share forms easily using SharePoint Server 2010 and SharePoint Workspace 2010. Also, thanks to integration with SharePoint Workspace 2010, users can complete the forms you create online or offline.

InfoPath Filler makes it easy for users to open and complete the forms you create. You set up the way you want users to submit completed forms by choosing to receive the form by e-mail, have the data sent to a SharePoint library or SharePoint server, or use Web services to gather the information. You can also include your InfoPath 2010 forms in Outlook 2010 messages, which makes it possible for you to collect information by e-mail and store it in the database or SharePoint library you specify.

Part III
Next Steps with Office 2010

Now that you have explored the new features in each of the core Office 2010 applications, this part of the book helps you answer the question, "What next?" Because Office 2010 is an integrated suite of applications, you can use the programs together gracefully to get more out of the files you create and share. This part also spotlights the security measures you'll find in Office 2010 and introduces various ways you can learn more about the programs and increase your own proficiency.

You'll find the following chapters in this closing part of *First Look: Microsoft Office 2010*:

- Chapter 12: Putting It All Together
- Chapter 13: Security in Office 2010
- Chapter 14: Training Made Easy
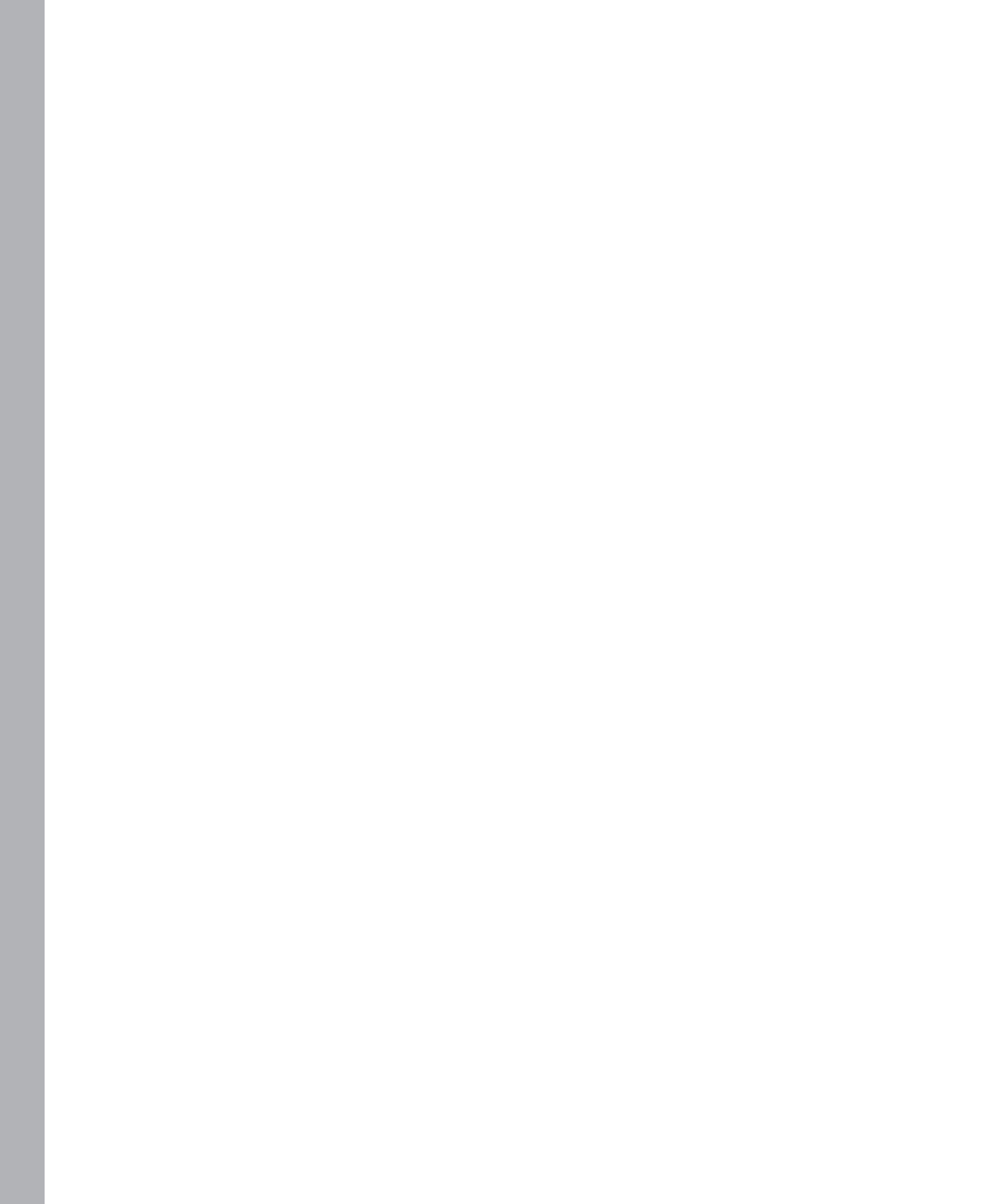
Chapter 12
Putting It All Together

In this chapter:

■ Using Excel 2010 Data with Word 2010

■ Sharing SmartArt Among Office 2010 Applications

■ Dragging Word 2010 Content to PowerPoint 2010

■ Mail Merging Word 2010 Documents in Outlook 2010

■ Sharing Access 2010 Data with Other Office Applications

■ Scheduling a Meeting from a Shared Document

One of the great benefits of working with the Office 2010 suite is that no matter which applications you use most often, they all have a similar look and feel. This means that even if you use PowerPoint 2010 only when you need to make a presentation to the board, or you use Publisher 2010 only when you need to create business cards, you can find your way around the programs easily using the familiar Ribbon and Backstage view.

Office 2010 enables you to share your work among applications—and among colleagues—more easily than ever before. A number of integrated features make it simple to use what you create in one application seamlessly in another. That saves you time and effort, and it guarantees consistency throughout your creations no matter what kinds of final files you create and share. The examples in this chapter provide just a few of the ways you can share your data among applications—take the time to discover how you can share what you create in an application to get more from your work in Office 2010.

Using Excel 2010 Data with Word 2010

Once upon a time, to include worksheet data in your documents, you needed to create a table and enter the values by hand. We've come a long way since those early days, thankfully, and Paste with Live Preview makes it easy not only for you to copy and paste (or drag) your worksheet information into your document, but to paste it just the way you want it—with or without formatting. (See Figure 12-1.)
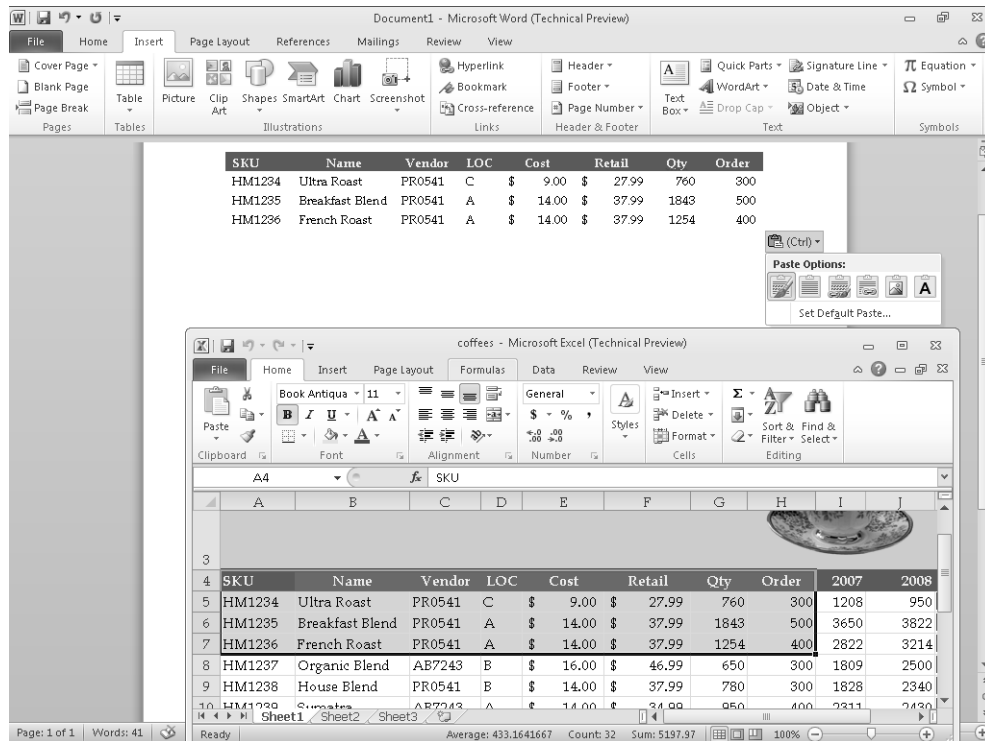
FIGURE 12-1 Choose the way you want data to be pasted in your document.

The paste options provide you with a variety of choices that control the way the information is inserted into the document. Table 12-1 explains the various paste options shown in Figure 12-1.

TABLE 12-1 Paste options

Tool Name	Description
Keep Source Formatting	Pastes the copied information using the same formatting options that were applied in the source document
Use Destination Styles	Pastes the new information into the document using the styles existing in the receiving document
Link & Keep Source Formatting	Preserves the formatting of the original document, but links the data to the original file so that changes will be reflected in the pasted information if you update the source document
Link & Use Destination Styles	Uses the style formatting in the receiving document by maintaining a link to the original file so that the data is updated if you change the original document
Picture	Pastes the information as a picture object in the document
Keep Text Only	Pastes the data as text only, with no applied formatting

Tip In the Paste Options list, you can click Set Default Paste to display the Advanced options and specify the default pasting styles you want to use in the current application.

Sharing SmartArt Among Office 2010 Applications

SmartArt in Office 2010 has been enhanced to provide new support for pictures as well as additional layouts for you to use in the different Office applications. More good news is that you can create a SmartArt diagram once—in, for example, Word 2010—and use the same diagram in Excel, PowerPoint, Outlook, OneNote, and even Access. Figure 12-2 shows a drag operation where a SmartArt diagram is dragged from Word 2010 to an Excel 2010 worksheet.
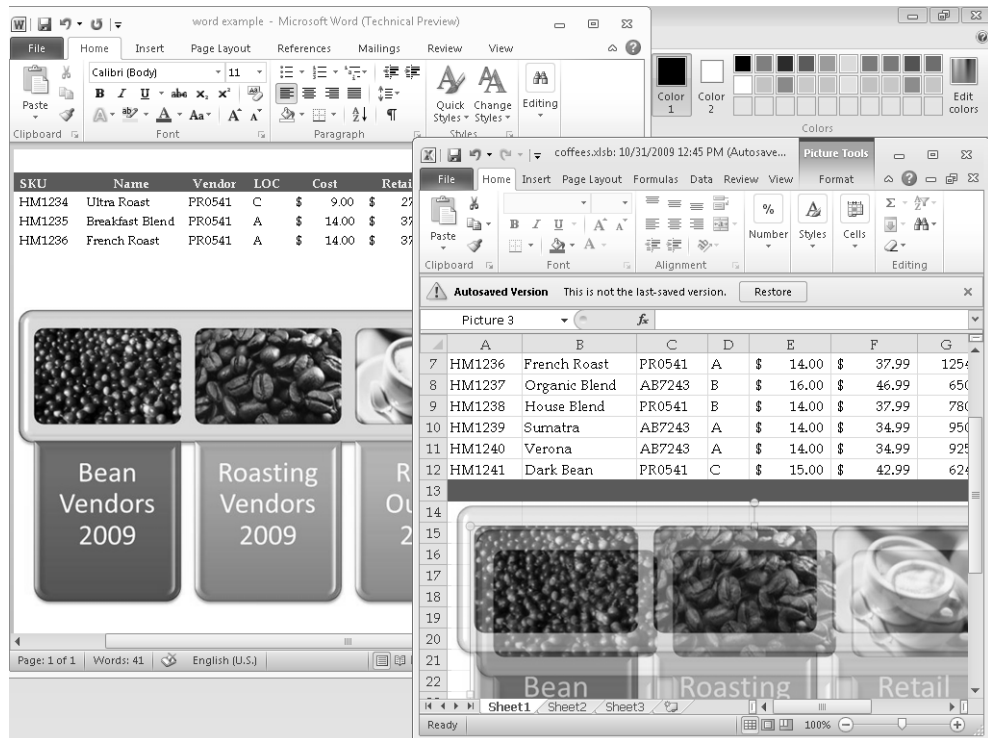
FIGURE 12-2 Drag SmartArt from Word to Excel.

Tip You can also save a SmartArt diagram as a picture in one of four formats (PNG, GIF, TIFF, or WMP) so that you can easily post it in Web content, import it into a layout program, or use it in any other application that works with standard graphics files. Note, however, that the picture file you save will not have the interactive diagramming features that are available when you work with the SmartArt diagram in your Office 2010 applications.

Dragging Word 2010 Content to PowerPoint 2010

Depending on your creative style, you might be more comfortable drafting your ideas in Word and then porting them into PowerPoint. You can easily create your outline, paragraphs, or bulleted lists in a Word document and then drag it into PowerPoint. (See Figure 12-3.) Again, Paste with Live Preview comes into play.

After you place the content in PowerPoint 2010, you might still have some basic formatting to do to fit the right content on the right pages, but the process is much faster than retyping the information you need. You can also drag notes from Word into the Notes area of your PowerPoint slides and then print the notes pages (with text and slide images) from within PowerPoint 2010.
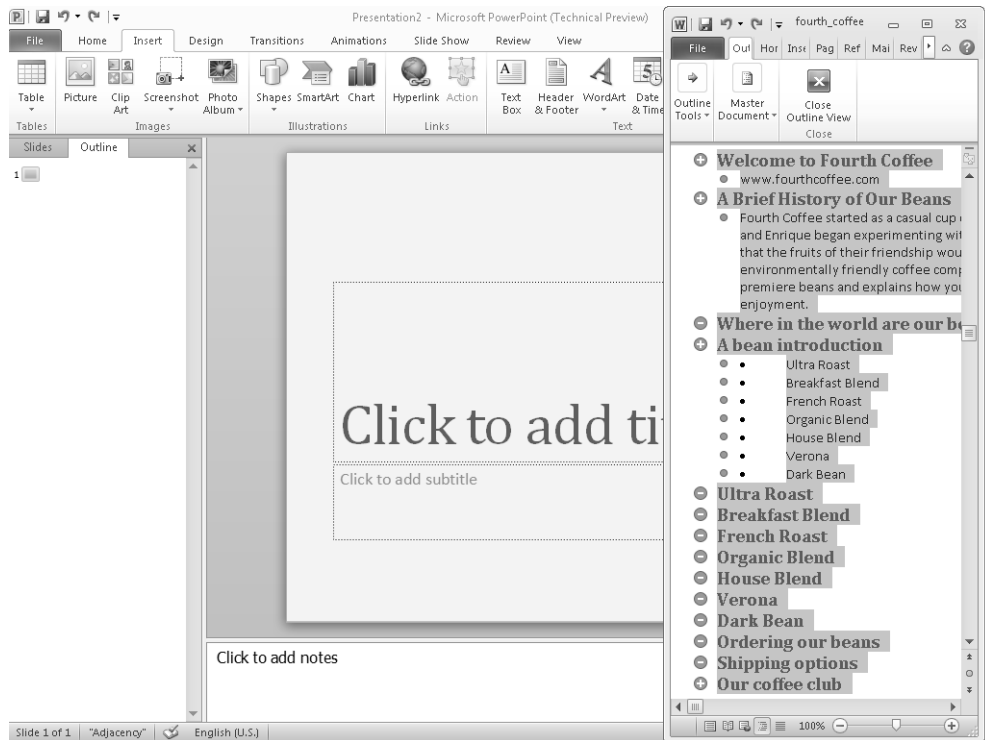

FIGURE 12-3 Drag an outline from Word to PowerPoint.

Mail Merging Word 2010 Documents in Outlook 2010

Suppose that you want to send a new e-mail catalog list to all your customers. Rather than beginning in Word 2010, drafting your document, and then connecting a contact list you exported from Outlook 2010 and saved in Excel 2010, you can do the whole process in two simple steps:

1. Create the document you want to send in Word 2010.

2. Mail merge the document with your Outlook contacts and send it via e-mail.

Nice, right? The new mail merge feature in Outlook 2010 enables you to easily create mail merge projects you can use to send form letters, mailing labels, envelopes, and catalogs. (See Figure 12-4.) To find the Outlook Mail Merge feature, click Contacts at the bottom of the navigation pane on the left side of the Outlook 2010 window and then click Mail Merge in the Actions group of the Home tab. The Mail Merge Contacts dialog box opens, offering you a collection of options you can use to set up your merge.
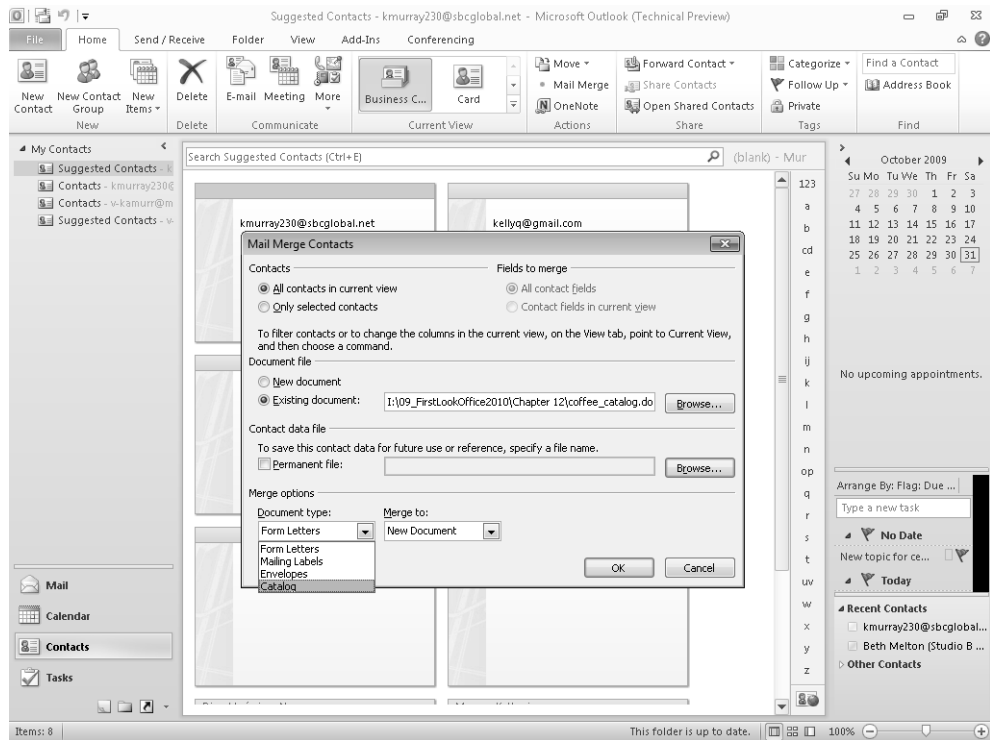

FIGURE 12-4 Use the Outlook Mail Merge feature to simplify mail merge projects.

In the Document File area of the Mail Merge Contacts dialog box, you can create a new document or choose Existing Document and click Browse to navigate to the document you created in Word. Click Open to add the file to the Mail Merge Contacts dialog box, and, after adding the contact data file, click OK to start the merge.

Sharing Access 2010 Data with Other Applications

Although the features that enable you to use Access data with other Office 2010 applications aren't new in this latest release, the program makes it easy for you to share your Access data with files and messages you create in Excel 2010, Word 2010, Outlook 2010, and even OneNote 2010. You'll find the tools you need in the External Data tab of the Access 2010 window. (See Figure 12-5.)
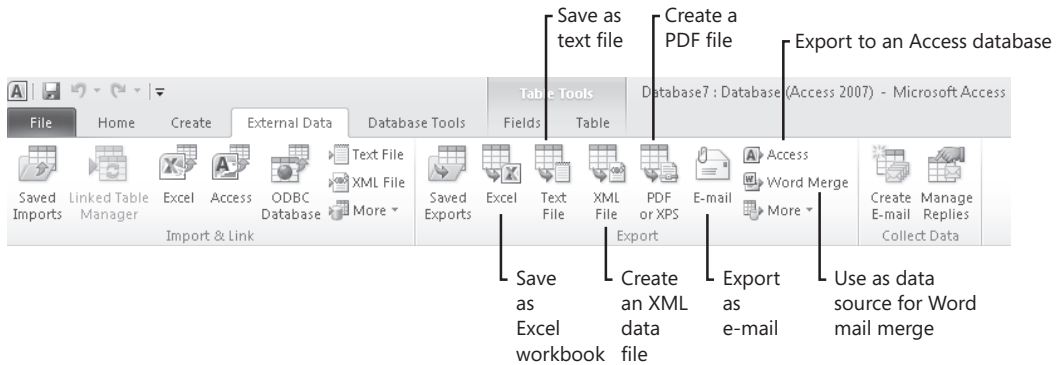
FIGURE 12-5 Share Access 2010 data with Excel, Word, Outlook, and OneNote 2010.

You can easily use portions of your Access data in other applications as well. Suppose that you're reviewing your customer database and you see that several customers haven't been contacted in more than a year. You can make a note to yourself in your OneNote notebook to follow up with those customers by simply dragging the highlighted names and e-mail addresses to your To Do notebook. Or you can create a task in Outlook and assign the follow-up calls to someone else on your team. By simply dragging the content, or cutting and pasting it (using Paste with Live Preview), you can share the data in ways that enable you to follow through on action items that might otherwise slip your mind.

Scheduling a Meeting from a Shared Document

And of course one of the biggest stories in Office 2010 is the ability you now have to share your files, in real time, from within core applications. For example, if you co-author a Word document and notice that one of your co-authors is working on the document while you're editing it, you can send her a quick instant message to ask a question about the file.

To contact co-authors while you work on a document, click the File tab and then click Info in Backstage view. In the Author area on the right side of the view, double-click the name of the co-author you want to contact. The contact card appears, listing various ways you can reach the co-author. (See Figure 12-6.)
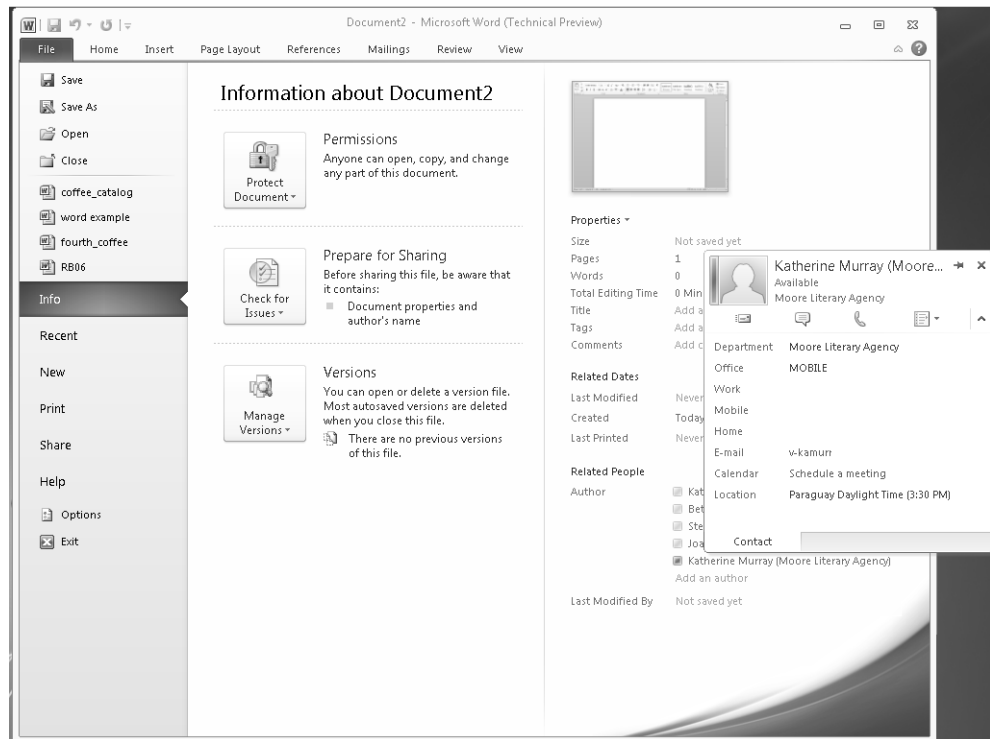
FIGURE 12-6 Contacting a co-author from within a shared document is a great new feature in Office 2010 applications.

When you click Schedule A Meeting, an Outlook appointment window appears so that you can schedule the time and the format for the meeting. You can set up a Live Meeting, schedule a conference call, or invite your co-author to a face-to-face meeting at a location you specify. (See Figure 12-7.)
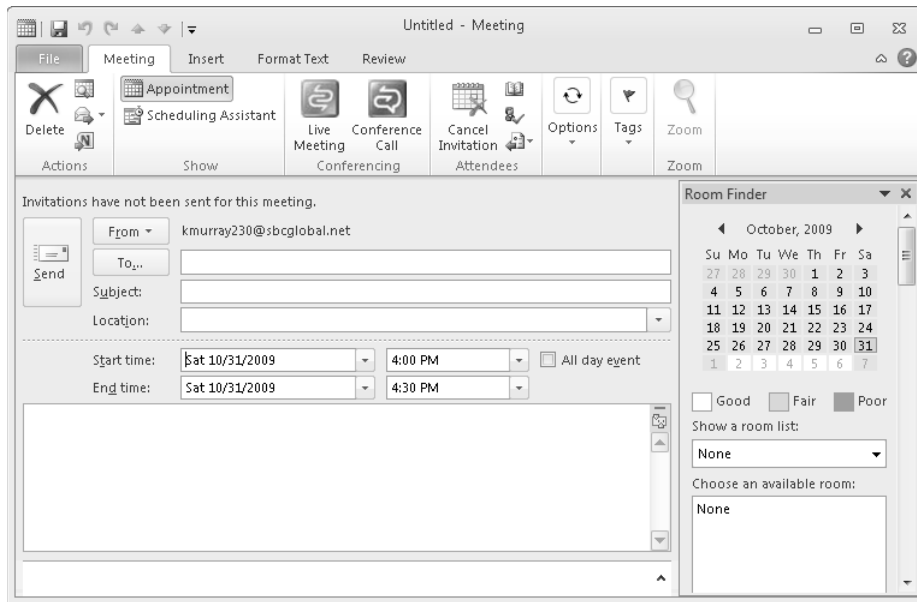
FIGURE 12-7 Schedule a meeting on a shared document.

Meeting scheduling is of course just one aspect of the various ways you can communicate with co-authors who share your documents. You also can send an instant message to anyone on your team whose presence shows them to be available; you can launch a video call or voice-over-Internet call (if your communications client allows this). And, when instant contact isn't an option, you can always send an e-mail message.

Chapter 13
Security in Office 2010

In this chapter:

- Understanding Security in Office 2010
- Opening Files Safely
- Working with Protected View
- Password Protecting a File
- Limiting File Changes
- Setting Role-Based Permissions
- Recovering Unsaved Versions
- Working with the Trust Center

How many attached files do you receive via e-mail every day? How often do you open documents sent to you by people you don't know? How many times in a week do you forward files along to coworkers for review or correction? Do you regularly trade files with others both inside and outside your organization?

This chapter introduces you to the security features in Office 2010. Today it's more important than ever to ensure that the files you send and receive are secure, and for this reason, Office 2010 includes new security features that add layers of protection to the files you create and share. Although much of the file checking that goes on is an invisible part of the process, you can control many levels of protection in Office 2010 applications, specifying who you want to have access to your files and what kinds of actions they can perform.

Understanding Security in Office 2010

Security in Office 2010 is focused on safeguarding your files, and Microsoft has accomplished that by making Office 2010 more resilient to attack. Office 2010 has a new security workflow with multiple layers that Office documents go through during the File Open process. This whole security effort is designed to be invisible to you as a user, so you won't notice any delays or dialog boxes when you open files you need to use.

Opening Files Safely

One of the vulnerabilities in previous versions of Office occurred in the file-opening process when a user went to open a file from a previous version of an Office application. Because hackers often design malicious files that masquerade as previous file types, this left user files unprotected when users worked with legacy formats.

The first line of Office 2010 defense includes a new Open File Validation process that checks to ensure files from previous versions of Office match the required format before the files will open. This process occurs behind the scenes, but you can open files confidently knowing that if the files open, they've already passed the Office validation check. If the system finds anything that poses a risk—perhaps an unrecognized file format—the system prompts you with a Protected View message at the top of the document window. (See Figure 13-1.)
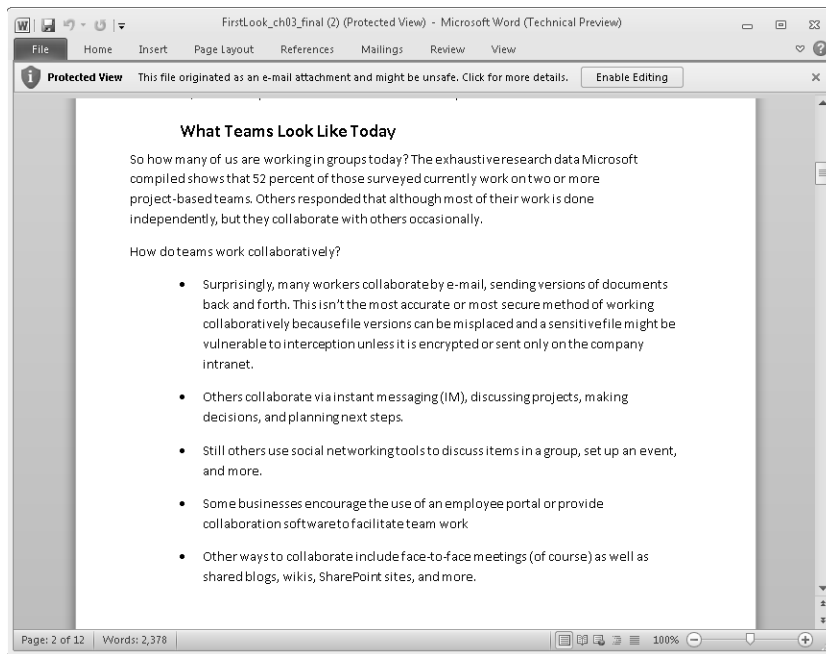

FIGURE 13-1 Protected View lets you know that the file is potentially unsafe.

The Open File Validation process now checks every file to validate the legitimacy of the file type before the file will open in your Word, Excel, or PowerPoint window. This process is transparent to you—you won't experience any delays in opening files or have to interact with any dialog boxes in the process.

If you choose, however, you can specify how you want the various applications to handle the files as they go through the Open File Validation process. You can display the File Blocking settings by clicking the Click For More Details link in the Message Bar when Protected View displays a message, or you can follow these steps to open the Trust Center and display the File Blocking settings in your current application:

1. Click the File tab.

2. In Backstage view, click Options.

3. In the Options dialog box, click the Trust Center category.

4. Click the Trust Center Settings button.

5. In the Trust Center, click the File Block Settings category. The File Block Settings window appears, as shown in Figure 13-2.
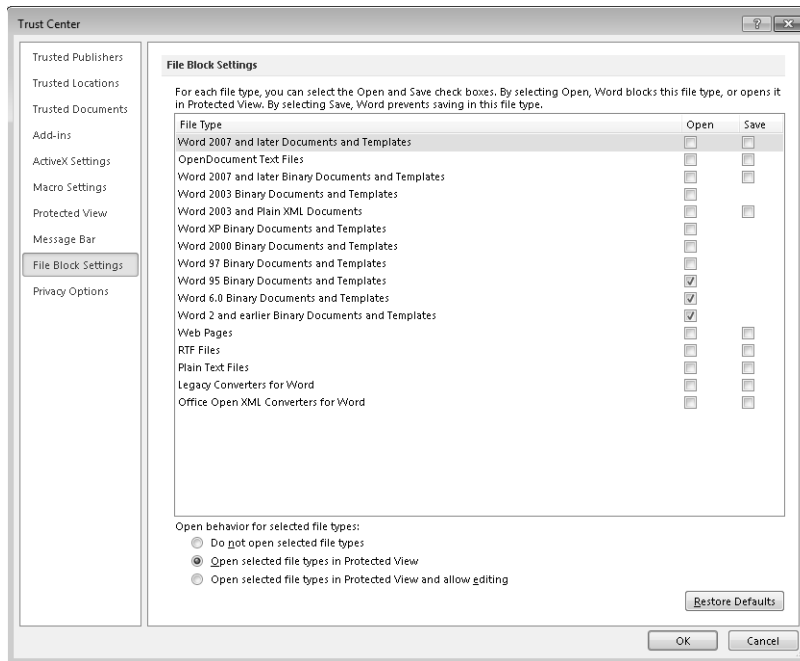
FIGURE 13-2 You can tailor the way applications open files from different formats.

By default, the file types with no check marks are opened in the application; they are not blocked or displayed in Protected view. The action selected in the Open Behavior For Selected File Types list that appears below the file types shows you what action is taken if a file type is selected. Table 13-1 explains a little more about each of these behaviors.

TABLE 13-1 **File block behaviors**

Setting	Description
Do Not Open Selected File Types	The selected files are blocked and will not be opened.
Open Selected File Types In Protected View	The selected file is opened in a safe mode that is protected from other files and processes.
Open Selected File Types In Protected View And Allow Editing	The selected file type is opened in safe mode, but the user is allowed to edit as normal.

Working with Protected View

When you see the Protected View message in your application window, the file you tried to open has either been blocked or has been determined to be in a file format flagged for blocking. If you still want to see what's in the file or find out if it is from a source you trust, you can open the file in Protected View.

Protected View is a safe mode that enables you to display a read-only view of the document. The file is opened in a protected space called a *sandbox*, where the file cannot affect your other files or system data. After you determine that the file is acceptable, you can click Enable Editing to open the file normally.

You also can change the way Protected View is used when questionable files are opened. The settings for Protected View are available in the Protected View category in the Trust Center. (See Figure 13-3.)
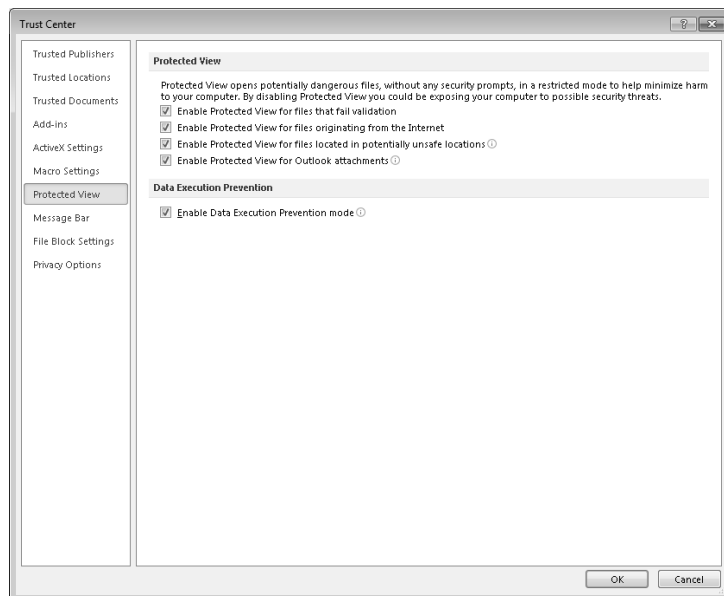

FIGURE 13-3 You can change the Protected View settings used to protect your computer.

Password Protecting a File

Although you've been able to add passwords to your Word, Excel, and PowerPoint files for a while, in Office 2010 the password encryption rules have been changed to account for password strength as well. You set an encrypted password for your file using Backstage view, as you see in Figure 13-4.

> **Tip** You can also set the password during the Save As process by clicking the Tools button, choosing General Options, and typing the password required to open the file. If you plan to share the file with others, you can type a separate password that you share with co-authors to enable modification and file sharing.
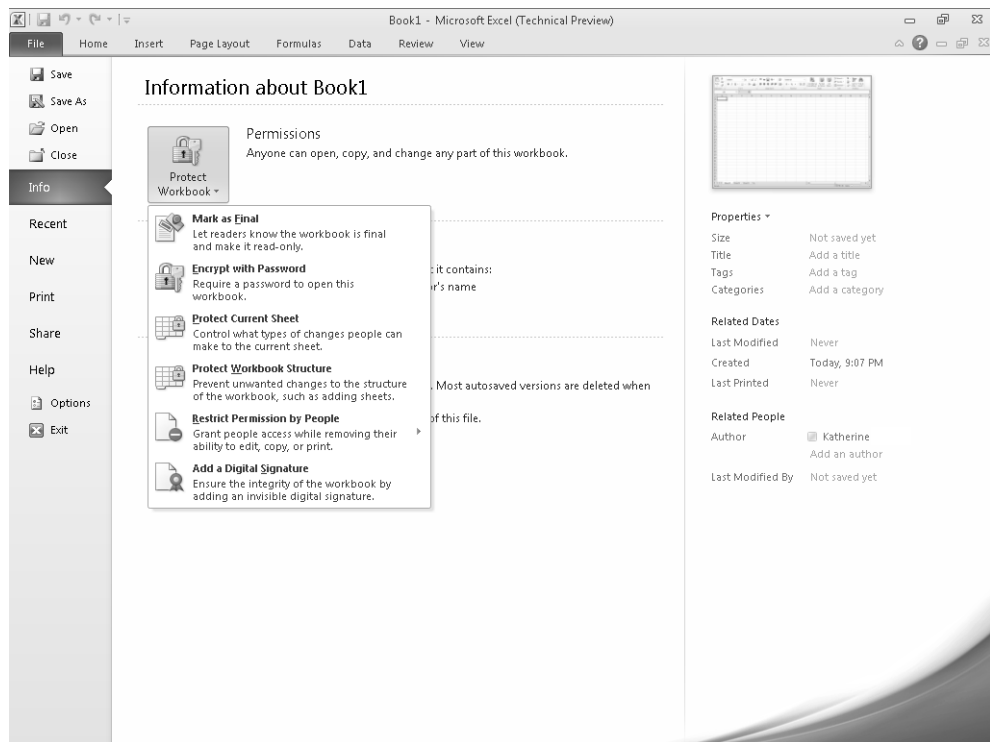

FIGURE 13-4 You can set an encrypted password for your document.

Note that when you set an encrypted password for your Word, Excel, or PowerPoint file, the password cannot be recovered if you forget the password later. For this reason, you should keep a copy of your passwords in a safe place you can access easily.

Limiting File Changes

In addition to ensuring the files you open and work with are trustworthy, you also need to be able to set parameters for the types of modifications that can be made to the file by others who work with the file as well. Each of the Office 2010 applications includes protection features that enable you to set safeguards at the file level. You'll find all the protection features in Backstage view, in the Info category.

Excel 2010 enables you to set several levels of protection for the current worksheet. In the Info category of Backstage view, you can choose one of the following options to limit the changes that can be made to the file:

■ Protect Current Sheet displays the Protect Sheet dialog box, which enables you to create a password other users must enter in order to modify the worksheet. Additionally, you can choose the actions you want to allow users to complete, such as format cells, insert columns, and delete rows. (See Figure 13-5.)

■ Protect Workbook Structure lets you safeguard the structure of the workbook—or the Excel window—by prohibiting others from adding new worksheets, for example.
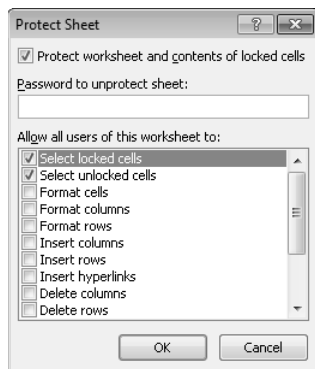
FIGURE 13-5 Excel 2010 enables you to limit the changes you want other users to make in the file.

Word 2010 offers several levels of restrictions that enable you to set the level of changes that can be made in a specific document. (See Figure 13-6.) These features, which were also part of Word 2007, allow you to limit others' changes in the following ways:

■ Formatting restrictions limit users to changing styles used in the document.

■ Editing restrictions enable you to specify whether you want users to view the file as read-only, or whether you will allow them to enter tracked changes, enter comments, or complete forms.

In addition to these two main restrictions, Word 2010 enables you to choose the parts of the document and indicate which users have the necessary permissions to edit those parts.

FIGURE 13-6 Word 2010 file protection enables you to block or restrict editing by type of task or by person.
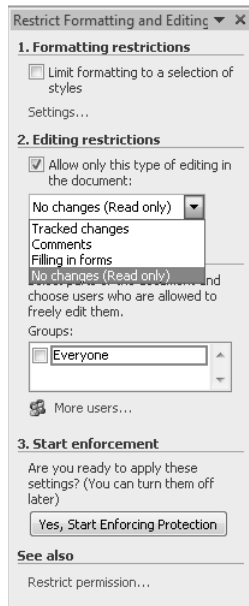
PowerPoint enables you to restrict others' ability to copy, edit, or print content in your PowerPoint presentation. You can also mark a file as final so that others can view—but not modify—the file.

> **Tip** Word, Excel, and PowerPoint all give you the option of adding a digital signature to your document to verify a document's integrity. The digital signature feature in each of these applications requires a signature service from a third-party vendor. You can begin the process by clicking the Add A Digital Signature option in the Protect selection of the Info tab, and a prompt will offer you the option of finding a signature service online.

Setting Role-Based Permissions

Another way to limit the access others have to your documents is to restrict permissions by role. The Restrict Permission By People option in the Protect settings in the Info tab (in Backstage view) of Word, Excel, and PowerPoint enable you to choose the group of people who you want to give access to your document. For example, in Figure 13-7, Unrestricted Access is still applied to the current file, but you can choose another setting to connect to your organization's rights management system, which defines the roles and permissions in your system. By default, choosing one of these options displays the introductory page of Information Rights Management, which is a free service from Microsoft that enables you to authenticate the credentials of others who work with your files.
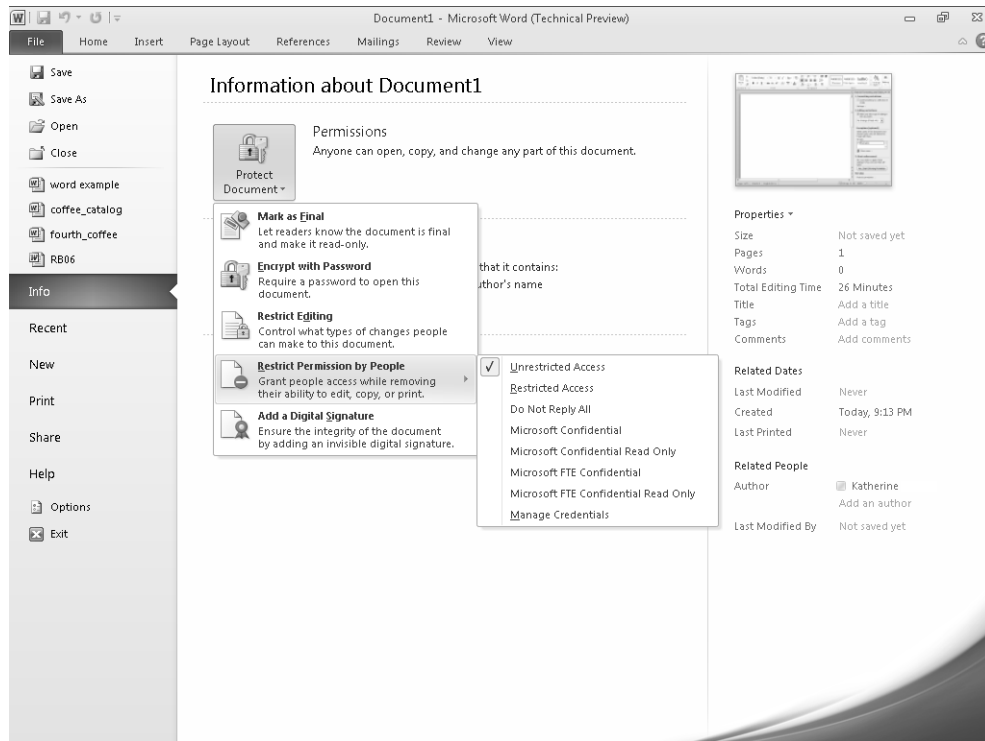
FIGURE 13-7 You can set multiple levels of protection in your files, including restricting permissions to a file.

Recovering Unsaved Versions

The process of retrieving unsaved copies of recent files might not be a security issue in terms of defending against data loss or attack, but having the ability to easily retrieve these copies can help you avoid a major headache if you forgot to save a file with business-critical data. Now Office 2010 applications enable you to recover unsaved versions of files you've worked on and retrieve the information you need.

You can find the recovered versions in Backstage view, in the Info category. Click Manage Versions to display the list of options. (See Figure 13-8.) Click Recover Draft Versions to display the Open dialog box, which lists any available previous versions of the file.

> **Tip** You can also display unsaved documents from the Recent category. Scroll to the bottom of the Recent Documents list, and click Recover Unsaved Documents. Double-click the file you want to view in the Open dialog box.
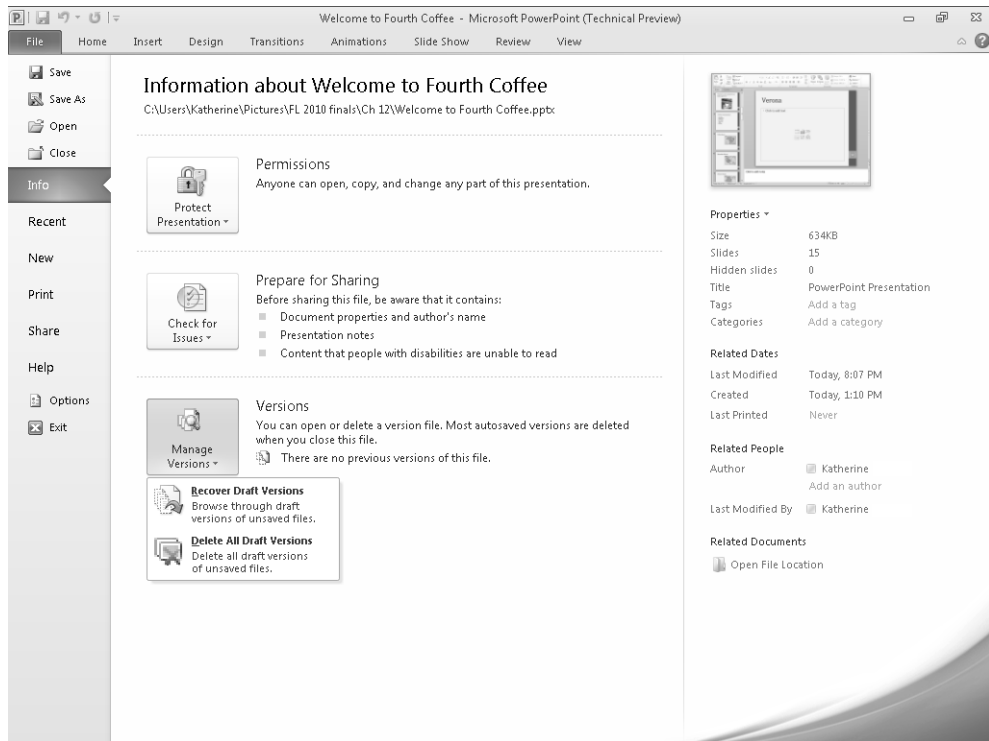
FIGURE 13-8 You can recover unsaved drafts and work with versions in Backstage view.

Working with the Trust Center

The Office Trust Center was introduced in Office 2007 and has been expanded and improved in Office 2010. The Trust Center enables you to choose your specifications for the way in which files are opened, shared, and protected, and it enables you to create lists of trusted publishers, documents, and locations that don't have to be authenticated each time you receive a document from them.

Display the Trust Center by choosing File and selecting Options in Backstage view. In the Options window, click Trust Center at the bottom of the category list, and click the Trust Center Settings button. (See Figure 13-9.) Table 13-2 lists each of the categories in the Trust Center and explains how you can use those options to safeguard your files.

FIGURE 13-9 Displaying Trust Center settings.

TABLE 13-2 Office 2010 Trust Center

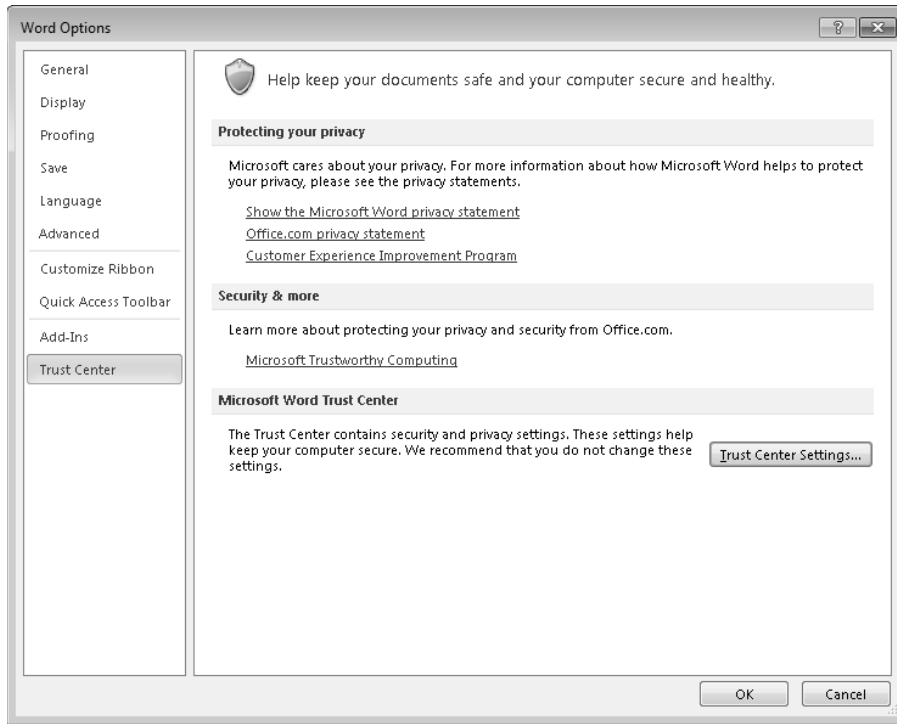| Category	Description
Trusted Publishers	Enables you to create a list of publishers you trust so that any content you receive from the publisher is opened freely without restriction.
Trusted Locations	Gives you the ability to create a list of trustworthy locations—for example, shared folders and SharePoint workspaces.
Trusted Documents	Creates a list of documents you have specified as trusted. After a document is marked as trusted, macros and all content is enabled automatically.
Add-ins	Enables you to specify whether any application add-ins must be signed by a trusted publisher.
ActiveX Settings	Lets you choose whether ActiveX controls will be allowed to play in regular more or in safe mode. You also set the level of restriction for the running of the controls.
Macro Settings	Sets whether macros are automatically disabled or enabled.
Protected View	Enables you to choose the situations in which Protected View is used.

Category	Description
Message Bar	Lets you show or hide the Message Bar.
File Block Settings	Gives you the ability to choose whether specific file types are blocked from being open or saved.
Privacy Options	Lets you set privacy options for the current file, run the Document Inspector, and set translation and research options.

By default, Office 2010 is set to provide a safe, reliable experience for you as you open and share the files you create. For most settings—including ActiveX Settings and Macro Settings—leaving the options set to the optimal level will ensure better protection for your files and system.

Chapter 14
Training Made Easy

In this chapter:

- Getting Help in Office 2010
- Finding What You Need on Office Online
- Take Your Learning to the Next Level with Microsoft eLearning
- Continue Learning with Microsoft Press Books

Now that you know about all the new and improved features you'll find throughout Office 2010, your next step is to begin working with the program, exploring your favorite applications, creating new documents and presentations, and sharing what you create. As your experience with the program grows, you might want to learn about the specific applications in greater detail.

Whether you learn best from books, articles, or online courses, you'll find that many resources are available to help you learn more about Office 2010. This chapter gives you a quick introduction to a few Help changes in Office 2010 and introduces several of the key resources available that will help you expand your Office 2010 experience.

Getting Help in Office 2010

As you get to know the various Office 2010 applications, you'll notice right away that the familiar tooltips are still there to help you learn about the tools and window elements. (See Figure 14-1.) The Office 2010 Help button is also in the same place it occupied in earlier versions of the program—on the far right side of the screen, just above the Ribbon.

The Help tab in Backstage view is a new feature that brings together all your program information into one convenient window. In the Help window, you'll find information that will help you get product information, access program help, and find what you need to get technical support. (See Figure 14-2.)
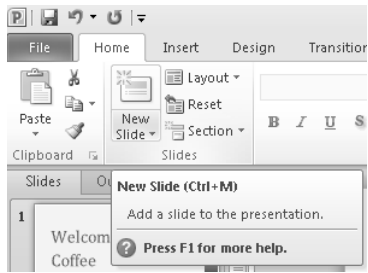
FIGURE 14-1 Tooltips provide you with information about specific elements in Office 2010 application windows.

FIGURE 14-2 The Help tab in Backstage view enables you to get support, access help, and find program information.

You can use the information in the Help tab of Backstage view to do the following things:

- ■ Activate your software.

- ■ Take a tour of basic program features.

- ■ Check for program updates.

- ■ Search for information in Microsoft Office help.

- ■ Change program options.

- ■ Contact Microsoft Support.

The product information in the right side of the Help window shows you all the programs you have activated, and it also lists any software you are currently using for a specific trial period. This information will be helpful if you need to call technical support at some point and will help the technician diagnose any problems you are having with the software.

Tip If you miss the good, old-fashioned About window that was available in previous versions of Office, you can display it by clicking Additional Version And Copyright Information on the right side of the Help tab in Backstage view.

Whether you click Microsoft Office Help in the Help tab to display the Help system or you click the Help button in the right side of the application window, the results are the same: the Help window appears. (See Figure 14-3.) Using the Help system is a simple process. It's similar in appearance to previous versions, but the Office 2010 Help system pulls information from *www.office.com*, so you always have access to the most recent help information.

You can enter a word or phrase in the search box or click a category that reflects what you want. The Help window lists specific articles that relate to your selection. Click the item you want to view and, after reading it, answer the question "Was this information helpful?" by clicking Yes, No, or I Don't Know. A comment box appears so that you can add a note about your experience.

Tip Microsoft does use the information you enter to make changes in the Help system, so if you have a suggestion about how the help system can be improved, share it.
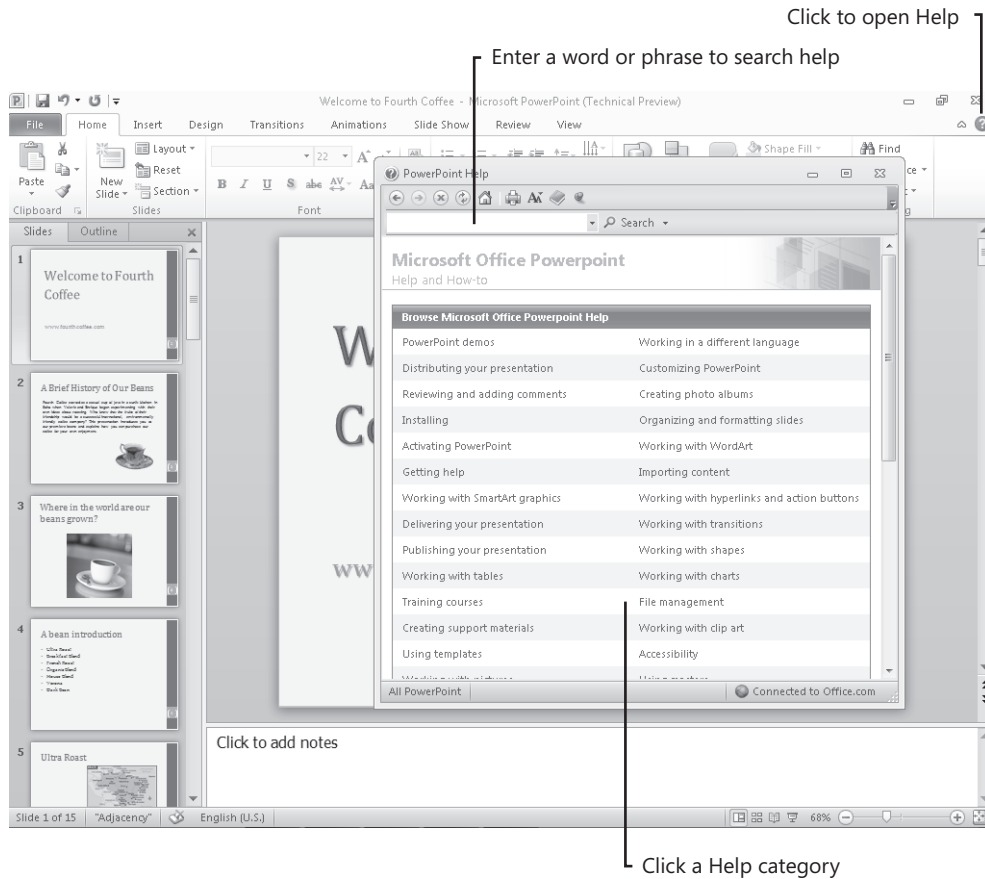
Click to open Help

Enter a word or phrase to search help

Click a Help category

FIGURE 14-3 The Office 2010 Help system connects automatically to *Office.com* so that you have access to the most recent help articles available.

Finding What You Need on Office Online

Another great resource—whether you want to complete online tutorials or download templates, clip art, or presentations for training—is Office Online. (See Figure 14-4.) In April 2009 alone, more than 131 million unique users visited Office Online (*www.office.microsoft.com*), downloading more than 500,000 training presentations and logging more than 4 million visits to the training center.
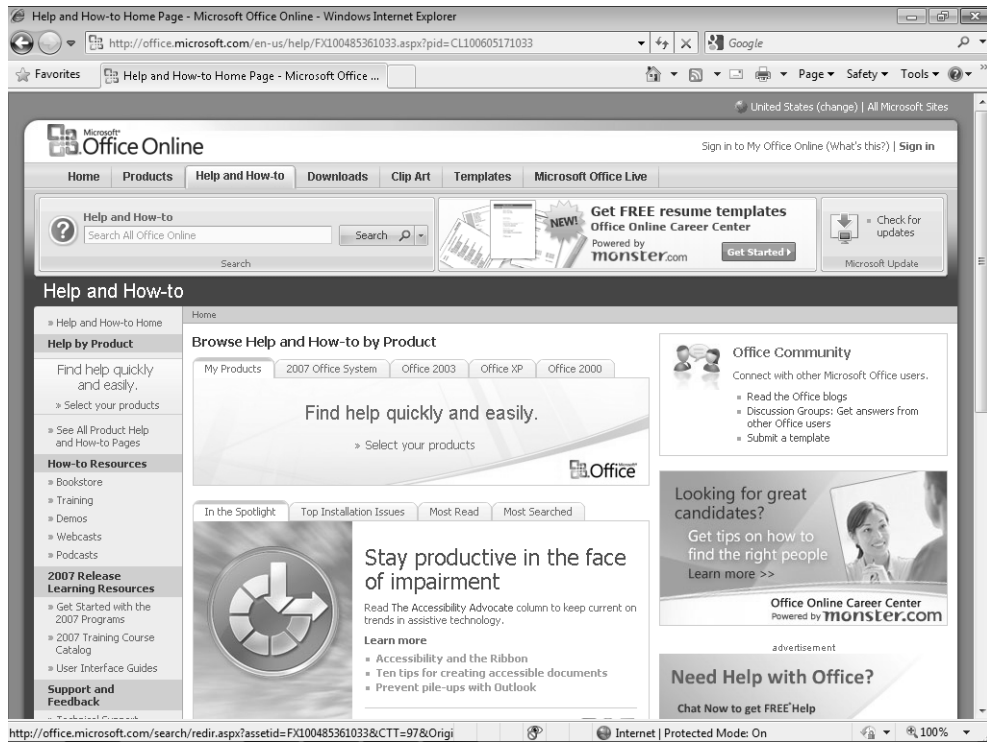
FIGURE 14-4 Office Online offers a variety of downloads, tutorials, articles, and links to additional resources and partner sites.

On Office Online, you can do the following:

- Find information about each of the Office 2010 applications.
- Visit resource centers for small business or home users.
- Take a tour of key Office 2010 features.
- Check for available updates for your Office 2010 programs.
- Learn about the different Office 2010 suites and servers.
- Find Webcasts, podcasts, demonstrations, and more information related to the Office 2010 applications.
- Get links to Microsoft Office product support.
- Download templates, service packs, clip art, and more.

Take Your Learning to the Next Level with Microsoft eLearning

When you're ready to take your learning to the next level by exploring applications in depth, you can take any one of a number of online learning courses at Microsoft eLearning (*www.microsoft.com/learning*). These online learning courses give you a convenient way to work at your own pace, prepare for an exam, and earn certifications.

Some of the learning courses are clinics that offer interactive games and self-tests, demonstrations, and hands-on virtual labs. You can create your own learning plan with Microsoft eLearning and save the courses in a queue to complete as you have time. Courses can be completed online or downloaded (with a free downloadable viewer) so that you can complete them offline on your own computer. (See Figure 14-5.) At the time of this writing, new courses are planned for Microsoft eLearning that provide an overview of Office 2010 and walk you through key features in a number of the core applications.
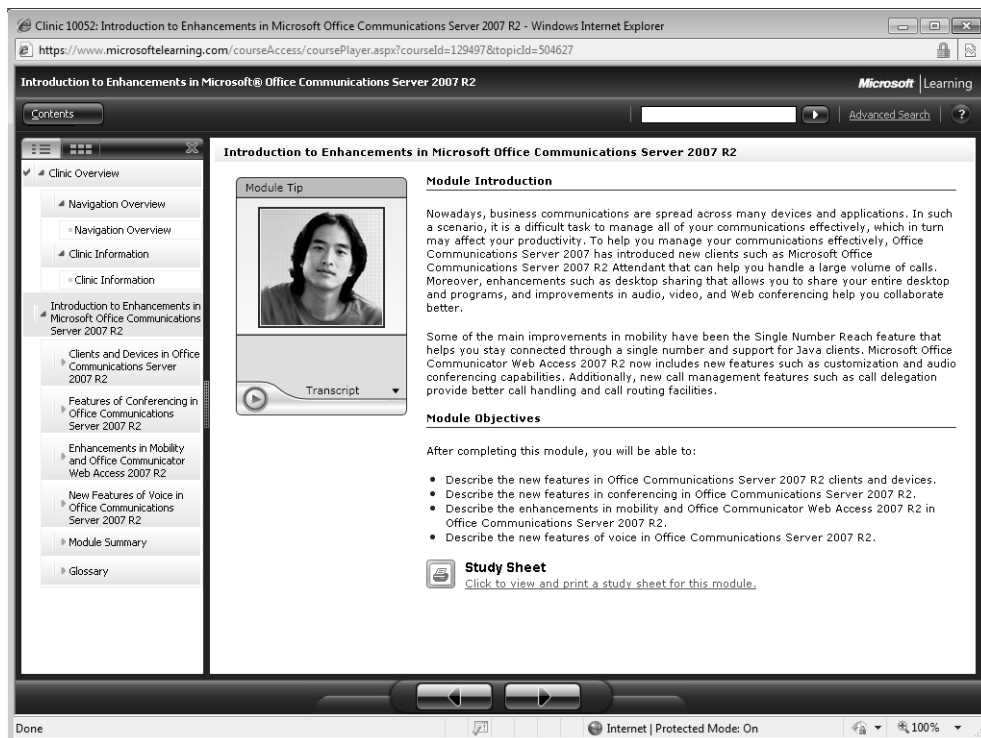

FIGURE 14-5 Microsoft eLearning offers more than 1000 online learning courses that can help you learn more about applications and prepare for projects and certification.

Continue Learning with Microsoft Press Books

In addition to the online and in-program offerings you can use to learn more about Office 2010, you'll find a number of great books that can help you master the various applications. Whether you're a new, experienced, or expert user, chances are that Microsoft Press publishes a book that will speak to you. Here's a list of the upcoming Office 2010 books that will be available after the launch of Office 2010:

Office 2010

Microsoft Office 2010 Plain & Simple

Microsoft Office 2010 Step by Step

Microsoft Office 2010 Inside Out

Microsoft Office 2010 Step by Step Home & Student

Access 2010

Microsoft Office Access 2010 Step by Step

Microsoft Office Access 2010 Inside Out

Excel 2010

Microsoft Office Excel 2010: Data Analysis and Business Modeling

Microsoft Office Excel 2010 Inside Out

Microsoft Office Excel 2010 Step by Step

Microsoft Office Excel 2010 Plain & Simple

PowerPoint 2010

Microsoft Office PowerPoint 2010 Step by Step

Microsoft Office PowerPoint 2010 Plain & Simple

Beyond Bullet Points: Using Microsoft Office PowerPoint 2010 to Create Presentations That Inform, Motivate, and Inspire

Project 2010

Microsoft Office Project 2010 Inside Out

Microsoft Office Project 2010 Step by Step

Outlook 2010

Microsoft Office Outlook 2010 and OCS Inside Out

Microsoft Office Outlook 2010 and LiveMeeting Step by Step

Microsoft Office Outlook 2010 Plain & Simple

SharePoint 2010

Microsoft Office SharePoint 2010 Inside Out

Microsoft Office SharePoint Designer 2010

Microsoft Office SharePoint 2010 Step by Step

Microsoft Office SharePoint Designer 2010 Step by Step

Word 2010

Microsoft Office Word 2010 Step by Step

Microsoft Office Word 2010 Plain & Simple

Microsoft Office Word 2010 Inside Out

Visio 2010

Microsoft Office Visio 2010 Step by Step

Katherine Murray

Katherine Murray has been writing about technology since the mid-1980s, which means she's seen a lot of menu bars, nested dialog boxes, and new user interfaces over the years. A big fan of the changes in Office 2007, Katherine was excited to learn about the new directions in Office 2010 that enable her to write in coffee shops, access her chapters via the Web, and trade notes with editors in real time. Katherine has written more than 50 books about technology since 1988 and specializes in Microsoft Office technologies, but she's fascinated by any technology that enhances the way we communicate and work together.

Microsoft®

More Resources For
Office 2010

Microsoft Learning provides a wealth of resources for every learning style—whether self-study, interactive, or classroom. As we get closer and closer to the release of Microsoft® Office 2010, we will continue adding learning resources to our site to help you get ready:

microsoft.com/learning/en/us/training/office.aspx

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For beginning to intermediate users. The smart way to learn and practice the skills you need—one step at a time! Includes ready-to-use sample files.

Inside Out
For intermediate to advanced users. Hundreds of timesaving solutions, troubleshooting tips, and workarounds. Conquer your software—from the inside out!

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