INTRODUCTION

In this Introduction

Over the past dozen years, Microsoft Office has gone through a half-dozen upgrades. And every time, pundits and reviewers trot out the same complaint: there's nothing new.

No one's saying that about Office 2007.

It's taken Microsoft nearly four years to deliver this upgrade, which is roughly twice as long as the average gap between each of the five previous versions. What were they doing in all that time? Oh, just replacing the core interface that has defined desktop software since the earliest days of Windows. Adding a new graphics engine. Tightening security. You know, little stuff.

In its early years, Office was little more than a bundle of programs built by teams that sometimes worked at cross purposes with one another, and the whole package was held together with the digital equivalent of baling wire and chewing gum. In this massive update, however, Microsoft has delivered something genuinely new and surprisingly well integrated.

The new Office interface, with its Ribbon, tabs, and groups of commands, is a shock at first. The more you know about the old interface, the more you'll have to unlearn to become productive again. And the old interface with its menus and toolbars isn't gone completely. It still has odd inconsistencies, as well as bugs, features that don't work as advertised, and some limitations guaranteed to drive expert users crazy. But for the fourth edition of this book, we were pleasantly surprised to see how many of the new features actually work as advertised.

As befits the name, Office 2007 has a decidedly corporate bias. In fact, some of the collaborative features that are at its core are available only if you enlist an army of IT professionals to run a room full of servers. To help show you how to make Office programs work with SharePoint and other network-based services, we had to build our own corporate network. (In the process, we developed a deep empathy for the challenges that network administrators have to deal with every day.) But we didn't lose sight of the fact that most of our readers still think of Office as *personal* productivity software.

Some of what you see in *Special Edition Using Microsoft Office 2007* will be familiar to you if you've worked with an earlier edition of this book. We didn't take the easy way out and simply reprint some of those old chapters on the theory that the programs didn't change much. Instead, we went through every chapter, sentence by sentence, testing, verifying, updating, and adding a wealth of new information to ensure that this book is accurate and absolutely up-to-date.

WHO SHOULD BUY THIS BOOK

If you need an Office reference book you can rely on—one that won't bore you with the obvious, pull punches when Office comes up short, or turn mealy-mouthed when you hit the really hard parts—you have the right book in your hands.

As with other titles in Que's best-selling *Special Edition Using* series, this book focuses on the unique needs of business professionals and business users. We assume you're experienced with Windows, the Web, and, for the most part, previous versions of Microsoft Office. We

know that Office is an absolutely essential part of your everyday working life. We're also certain you've experienced your fair share of Office bugs and annoyances firsthand. Because we're confident you've already figured out the basics, we've spent our time figuring out how these programs *really* work. Trust us—Office still has bugs and poorly designed features, and Microsoft doesn't always make it easy to see how you can combine features or customize applications to increase productivity.

What you'll find documented here is the raw Office, in all its glory, seen through the eyes of experts who have been pushing Office to the limit for years and years. We don't gloss over the rough spots. We show you what works and what doesn't—giving real-world examples and advice for the former and, whenever possible, workarounds for the latter.

We figure you're smart enough to experiment with basic features and to read the online help when you want to know how an Office program is *supposed* to work. That's why you won't find beginner-level instructions in this book. Instead, you'll find what isn't in the official documentation—key details, insight, and real-world advice you can't find anywhere else. And it's all arranged so that you can get in, find the answer you need, apply it to your work at hand, and get out. This book may weigh a ton, but if you need the straight scoop on anything related to Office, this is where you should look first.

We're proud to present *Special Edition Using Microsoft Office 2007.*

How This Book Is Organized

Special Edition Using Microsoft Office 2007 is organized into seven parts. Naturally, each of the major applications in the Office suite gets its own section. Before diving into specific features of Outlook, Word, Excel, and the rest, however, we recommend that you read through the sections that cover the techniques common to all applications.

Part I, "Common Tasks and Features," covers the essentials of Office, most notably the new, radically revamped Office interface. We show you how to customize the one and only user-configurable element of the new interface, the Quick Access Toolbar. This section also covers Office 2007's exceptional new graphics tools, especially the slick SmartArt engine.

Office 2007 has a variety of new tools intended to enhance your privacy and your online security. Turn to Chapter 7, "Office Security and Privacy," for an overview of these new features and detailed instructions on how you can make sure your personal information stays private.

In Part II, "Using Outlook," we'll help you tame the flood of email, banish spam forever with Outlook's surprisingly effective junk-mail filter, keep your address book up-to-date, and set up reminders so that you never miss another appointment. We'll also explain how you can use its hybrid interface (old-style menus and toolbars in the main window, ribbons and tabs in message editing windows, and a new To-Do pane) to tie together contacts, calendars, tasks, and email for maximum productivity.

Part III, "Using Word," covers the oldest and most polished productivity application in Office. We'll walk you through every customization option (including a few you probably never even knew you needed). We'll show you how to supercharge your text-editing and formatting skills, how to manage long documents, and how to automate everyday documents so that they practically write themselves.

Part IV, "Using Excel," shows you tricks you never realized you could perform with this incredibly versatile tool. Check out the examples in our formatting chapters to see how you can turn drab rows and columns into eye-catching data graphics. We'll explain how to master any of Excel's 300+ functions, as well as which ones are worth memorizing. We'll unravel the secrets of making drop-dead gorgeous charts, and we'll show you how to use the effective new list-editing tools that turn Excel 2007 into one of the best flat-file database programs around.

Of all the Office applications, PowerPoint is probably the least appreciated. In Part V, "Using PowerPoint," we explain how this program really works, and we'll help you create compelling presentations that you can deliver in front of a large audience or a small one—or completely unattended over the Web.

In Part VI, "Other Office Applications," we focus on three programs found in selected Office versions. Access is Microsoft's industrial-strength database-management program. We explain how to build tables, forms, and reports, as well as simple (and not-so-simple) queries to find and filter data. We'll also clue you in on techniques you can use to automate everyday business tasks without having to become a programmer.

This section also covers Publisher, which takes up where Word leaves off to perform advanced page-layout tasks. And we look at OneNote, an offbeat but incredibly useful freeform note-taking application. And finally, we offer a broad overview of what you'll get with Office 2007 when you combine it with a growing family of server-based components.

If you need to install Office on one PC or several hundred, we'll run through all your options in Appendix A, "Advanced Setup Options," one of three appendixes at the back of the book. In Appendix B, "Macros and Add-Ins," we provide a whirlwind tour of how the tools to create, edit, and run macros have changed in Office 2007. And in Appendix C, "Using Office on a Tablet PC," we explain what's new when you install Office 2007 on a Tablet PC.

CONVENTIONS USED IN THIS BOOK

Special conventions are used to help you get the most from this book and from Office 2007.

TEXT CONVENTIONS

Various typefaces in this book identify terms and other special objects. These special typefaces include the following:

Type	Meaning
Italic	New terms or phrases when initially defined. An italic term followed by a page number indicates the page where that term is first defined.
Monospace	Information that you type or onscreen messages.
UPPERCASE	Typically used to indicate Excel objects, such as functions and cell references.
Initial Caps	Menus, dialog box names, dialog box elements, and commands are capitalized.

Key combinations are represented with a plus sign. For example, if the text calls for you to enter Ctrl+S, you would press the Ctrl key and the S key at the same time.

SECRETS OF THE OFFICE MASTERS

While using Office, you'll find many features that work well together or others that simply don't work well at all without some poking and prodding. We've used this chapter-ending element to point out some key areas in which you can combine features or find startlingly productive new uses for everyday features.

SPECIAL ELEMENTS

Throughout this book, you'll find Tips, Notes, Cautions, Sidebars, Cross-References, and Troubleshooting Tips. These elements provide a variety of information, ranging from warnings you shouldn't miss to ancillary information that will enrich your Office experience, but isn't required reading.

ED AND WOODY'S "SIGNATURE" TIPS

TIP FROM

Ed & Woody

Tips are designed to point out features, annoyances, and tricks of the trade that you might otherwise miss. These aren't wimpy, run-of-the-mill tips that you learned the first week you used Office—ones that you don't need us to tell you. Watch for our signatures on the tips to indicate some industrial-strength—and in many cases, never-before-documented—information.

NOTES

NOTE

Notes point out items that you should be aware of, although you can skip these if you're in a hurry. Generally, we've added notes as a way to give you some extra information on a topic without weighing you down.

CAUTIONS

Pay attention to Cautions! These could save you precious hours in lost work. Don't say we didn't warn you.

TROUBLESHOOTING NOTES

We designed these elements to call attention to common pitfalls that you're likely to encounter. When you see a Troubleshooting note, you can flip to the "Troubleshooting" section at the end of the chapter to learn how to solve or avoid a problem.

CROSS-REFERENCES

Cross-references are designed to point you to other locations in this book (or other books in the Que family) that will provide supplemental or supporting information. Cross-references appear as follows:

➜ For a full discussion of the wonders of PivotTables, **see** "Organizing Data with Tables and PivotTables," **p. 627**.

SIDEBARS

Want to Know More?
Sidebars are designed to provide information that is ancillary to the topic being discussed. Read these if you want to learn more about an application or task.