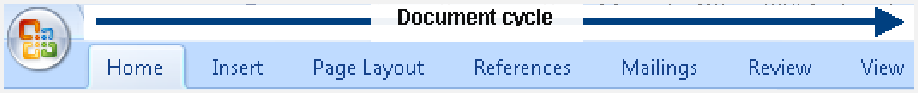
Microsoft Office 2007

Results-Oriented User Interface ("the ribbon"): *the redesigned interface is designed to follow the document cycle. For example, in Word you enter, edit, and format document text on the Home tab; add illustrations on the Insert tab; design the document on the Page Layout tab; add supporting references on the References tab; and collect feedback and protect your document on the Review tab.*



Themes and Styles: *In Office 2007, each document has a theme that controls the formatting for the document. In Word, a theme includes style sets – font sets – and color sets which are applied to objects. In Excel, themes include color sets, fonts, lines, and fill effects. Style sets based on the theme are applied to tables, charts, diagrams, and other objects. In PowerPoint, a theme includes a slide design, color sets, fonts, and effects (transitions).*

Office 2007

Overview of the Office 2007 user interface

File formats; compatibility mode; compatibility packs for Office 2003

Saving a document as a PDF or XPS

*Google **Microsoft SaveAsPDFandXPS.exe** to download the free add-in*

Setting options in Office applications

Word 2007

Word 2007 interface overview

Customizing the QuickAccess bar

Using themes, style sets and QuickStyles

Creating a table of contents

Saving and using building blocks

Outlook 2007

Searching in Outlook

Using the To-Do bar

Task consolidation

Using and customizing categories

Calendar: working with multiple calendars, sharing calendars, time zones for appointments

Creating and using Business Cards

Folders and Rules

Microsoft Office 2007

Presenter: Gini Courter, TRIAD Consulting

Upgrading to Office 2007 from an earlier version of Office? Today's sessions will show you what you need to know to upgrade efficiently while making the most of the dynamic new Office tools.

You'll learn how to:

Navigate the new Office 2007 ribbon interface.

Customize the Office QuickAccess bar.

Save files in compatibility mode to collaborate with Office 2003 users.

Save and send files as PDFs from Word or Excel.

Use styles to structure and format Word documents.

Create and save styles and style sets.

Use building blocks to create and style documents

Generate a Table of Contents with just one click.

Search your Outlook e-mail, calendar, contacts, or tasks quickly and accurately.

Use the To-Do Bar to quickly access your appointments and tasks.

Apply conditional formatting to discover patterns and highlight trends in your data.

Share your calendar with anyone within or outside of your organization.

Format workbooks using new simple tools and formats.

Create SmartArt diagrams and charts to illustrate data.

Excel 2007

Using and customizing the status bar

Working with tables: sorting, filtering formatting

Formatting your information based on criteria (conditional formatting)

Creating and modifying a chart

PowerPoint 2007

Understanding and using themes in PowerPoint

Using SmartArt diagrams

Replacing bulleted lists with SmartArt

Animating slides, text, and objects

Want more training? Check out Office PowerHour:www.officepowerhour.com

Upcoming sessions here

Office 2007 Drill Down

Building Blocks and Styles in Word 2007

About Styles and Headings

Each version of Word since Word 2000 has relied more heavily on styles: specifications for text formatting. There are built-in styles: Normal for body text, Title for the title of a report, Heading 1, 2, 3, and so on for the sections and subsections of a report. Word 2007 introduces Style Sets, which are groups of styles saved together.

If you don't use styles, it's time to start. Tables of Contents, web publishing, and other features rely on heading styles.

APPLY A STYLE

To apply a style, select the text you wish to format then choose the Style you wish to apply from the Styles gallery on the Home tab.

TIP: To select all the text in a document that is formatted the same, select one section of text, then right click. Choose Styles then Select Text With Similar Formatting.

To switch style sets, choose Change Styles then choose Style Set. (To preview the style set, simply point to the style set and note the changes in your document.)

EDIT OR CREATE A STYLE

Here's the easy way to change an existing style:

- Format some text the way you would like it to appear in the style. Select the formatted text.
- In the Styles gallery, right click the style you want to edit.
- Choose Update to Match Selection.

And the fast way to create a new style:

1. Format some text the way you would like it to appear in the new style. Select the text.
- Click the down arrow at the right end of the Styles gallery.
- Choose Save Selection As a New Quick Style.
- Enter a name for the style. Click OK.

CLEAR EXISTING FORMATTING

To clear formatting from a selection of text, click the right arrow in the Styles gallery and choose Remove Formatting.

TIP: To select all the text in a document, hold Ctrl and press A.

Generate a Table of Contents

Tables of Contents rely on your use of heading styles. Before creating a table of contents, make sure that you are using Heading 1 for the highest level in the table of contents, Heading 2 for the next level, and so on. A quick way to check your use of heading styles is to right click the Heading style in the Styles gallery, then choose Select All n Instances.

With heading styles applied, follow these steps to create a Table of Contents:

1. Place the insertion point where you want to insert the Table of Contents.
- Click the References tab. In the Table of Contents group, click Table of Contents.
- Choose the style of Table of Contents you wish to insert, or choose Insert Table of Contents to specify formatting including tab leaders and page numbers.

After you've edited your document, page numbers and headings may change. To update your Table of Contents right click in the table and choose Update Field, or choose Update Table from the Table of Contents group on the References tab.

About Building Blocks

While AutoText still exists, the functionality of AutoText and more is part of the new Building Blocks feature. Building Blocks include AutoText, Headers, Footers, Cover Pages, Citations, and other document "building blocks".

CREATE A NEW BUILDING BLOCK

1. Select the content you want to save as a building block.
2. Press Alt+F3 to open the Create New Building Block dialog box.
3. Enter a name for the building block.
4. Select a Gallery that you want to add the building block to.
5. Set other options.
6. Click OK.

USE A BUILDING BLOCK

1. Position your insertion point.
2. Open the appropriate gallery.
3. Select the building block.

Note: AutoText entries appear after you type the first few characters of the Name of the AutoText entry. Press Enter to accept the AutoText.

Outlook 2007

Tip: *The Advanced toolbar isn't advanced; it's just the commands that they couldn't fit on the Standard toolbar, commands that power users need. Right click the Standard toolbar and choose Advanced from the shortcut menu to display the Advanced toolbar.*

Shortcuts to Outlook Applications or Forms

The shortcut keys for Outlook are easy to remember: Ctrl+Shift and:

- **I** to jump to the Inbox

- **N** to create a new note
- **C** to create a new contact
- **A** for a new appointment
- **K** for a new task

Organize Your Day with the To-Do Bar

In prior versions of Outlook, you often had to switch from the Calendar to Inbox to Tasks to see all of your action items. In Outlook 2007, all of your action items are displayed in the To-Do Bar on the right edge of the Outlook window, regardless of where you created the action item. The To-Do Bar is available in every Outlook view (and integrated with the Calendar) so you can organize and track your day's activities no matter where you are.

***Tip:** If To-Do Bar isn't visible, choose View > To-Do Bar from the Outlook menu to display the To-Do Bar. Click the double-arrow on the To-Do Bar to maximize or minimize the To-Do Bar.*

The To-Do Bar shows the following action items:

- Messages flagged for follow up from your Inbox or Contacts
- Tasks from your Tasks list
- Upcoming appointments and meetings from your Calendar

If you have action items from applications that integrate with Outlook such as Microsoft Project or SharePoint, those items will also be displayed in the To-Do Bar.

Using the To-Do Bar

The To-Do Bar displays action items in the near future. Appointments and meetings are automatically removed from the To-Do Bar when their End Time is passed. Other items remain until you mark them complete or delete them. Right click the item and choose Mark Complete from the shortcut menu.

REMEMBER THAT THE TASKS ON THE TO-DO BAR ARE CREATED FROM EXISTING ITEMS (MESSAGES, CONTACTS, TASKS, APPOINTMENTS). IF YOU DELETE THE TASK, YOU'RE ALSO DELETING THE ITEM.

Customizing the To-Do Bar

To customize the To-Do Bar right-click anywhere in the To-Do Bar title and choose Options from the shortcut menu to open the To-Do Bar Options dialog box.

Tips and Tricks for the Outlook Calendar

Many office professionals spend more time in the calendar than in any other part of Outlook. Here are some tips for using the Calendar.

Keep the Calendar Open

Instead of switching from your Inbox to your calendar right click the Calendar button in the Navigation Pane and choose Open in New Window.

Display Multiple Days

Hold Shift and drag in the Date Navigator to select/display multiple contiguous days. Hold Ctrl and click to select/display multiple non-contiguous days.

Show Two Time Zones

With the calendar displayed in Day view, right click the time bar.

1. Choose Change Time Zone from the shortcut menu.
2. Turn on the Show an Additional Time Zone check box.
3. Choose the time zone. Click OK.

Reflect the Time Zone in an Appointment Form

Whether you're flying from one time zone to another or setting appointments for meetings in another time zone, you'll like this new feature in Outlook 2007. With the appointment form open, click the Time Zones button on the Outlook ribbon to display time zone drop down lists in your appointment form.

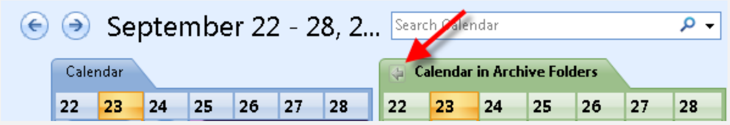
Adjust Your Day/Week/Month View

Use the drop-down View list on the Advanced toolbar or choose View ➢ Current View to select Day/Week/Month. Use the buttons on the Standard toolbar to choose whether to view 1, 5, 7 or 31 days at once.

If you're viewing 1, 5 or 7 days, you can select dates from the Date Navigator at the right (it looks like months of calendar dates). If you're viewing 31 days, scroll (on the right) to see different dates. To see more months in the Date Navigator, drag the horizontal divider between the Date Navigator and the Task Pad below it. Select a date to view by clicking it (in the Date Navigator). Select multiple contiguous dates by dragging them. Select multiple non-contiguous dates using the CTRL key with a click on the dates you wish to see. Change to a different month by clicking the arrows at the top of the Date Navigator.

Display Two or More Calendars

To show more than one calendar, choose Calendar in the Navigation Pane to display the My Calendars list. Turn on the checkbox for the calendars you wish to display. You can display up to 30 calendars side by side.



To overlay one calendar on another, click the arrow on the calendar tab. The second calendar is displayed as a transparent overlay so you can find open time slots shared by both calendars. Click the arrow button on the calendar tab turn off the overlay.

Schedule Appointments without Using a Form

1. Switch to Day/Week/Month view and click the Date Navigator to open the day you want to schedule.
2. Click in the time slot that corresponds to the start time of the appointment you want to enter.
3. Type the name of the appointment, and then drag the bottom border of the appointment block down to its end time. The blue line next to the appointment marks that time as busy, and the alarm clock represents a reminder that you'll receive before the appointment.

Set a Reminder

1. Double-click the appointment on the Calendar to open it.
2. Enable the Reminder check box to set the reminder.
3. Open the list of options in the Reminder field and choose a different duration.
4. Click Save and Close to close the Appointment form.

Scheduling Meetings and Events

Plan a Recurring Meeting

1. Open a new appointment form and enter information in the fields as usual or open an existing appointment by double-clicking it.
2. Click the Recurrence button on the form's Standard toolbar to set the recurrence pattern.
3. Choose Daily, Weekly, Monthly or Yearly from the options at the left.
4. Set the remaining recurrence options based on the original pattern you selected.
5. Click OK when you're done, then click Save and Close.

Schedule a Multi-Day Event

1. Open the Appointment form for a new or existing appointment.
2. Click the All Day Event check box. The time fields will disappear.
3. Enter the dates for the Start Time and the End Time of the event.
4. Enter other information as appropriate for this event.

If you're unavailable for the day or days in question, change the Show Times As field to Busy or Out of the Office.

Plan a Meeting with Others According to Availability

1. Switch to Calendar and click the Plan a Meeting button on the Advanced toolbar.
2. Click Invite Others and select the people, rooms and equipment you would like to have attend, either as Required, Optional, or Resources. Click OK. Outlook will go out to the network and get the other Invitees' schedules to display in the Meeting Planner. Attendees with calendars unavailable to Outlook will show hash marks in the schedule window.
3. Enter a preferred Start and End Time for the meeting and click AutoPick to find the first available time for all invitees.
4. When you have decided on a time, click Make Meeting.
5. Enter the details about the meeting: Subject, Location, Reminders, and Categories. Enter additional information (like a list of items you'd like attendees to bring) in the open text box.
6. Click Send to send messages to all Invitees.

When messages are returned with responses, open them in the Inbox, then return to the original appointment to view the Status of the responses by clicking the Attendee Availability tab.

Create a Group Schedule

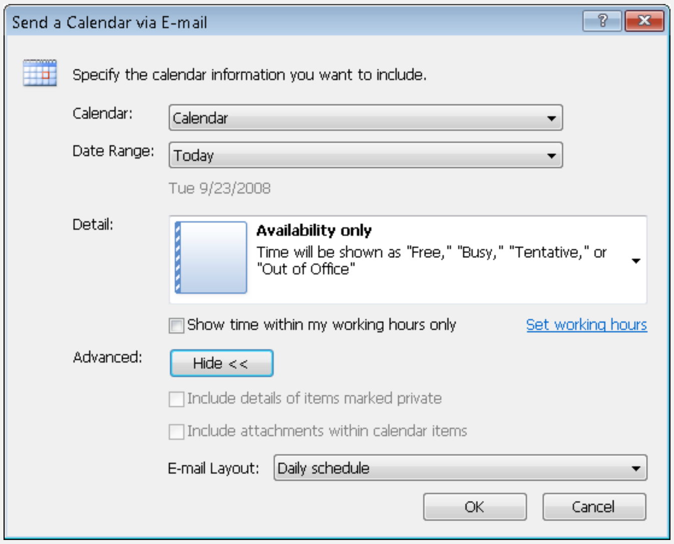
If your organization uses Outlook to schedule conference rooms and AV equipment, or if you have a group of people whose free/busy information you need to view frequently, check out the Group Schedule feature. To create a group schedule, choose Actions > View Group Schedules. Click the New button. Name the group schedule and click OK. Add people or resources to the group schedule. When you are finished, click OK.

To view a group schedule, choose Actions > View Group Schedules and choose the schedule you wish to view.

Share Your Calendar with Others

There are several ways to share your calendar. As in previous versions of Outlook you can give another person permission to view or modify your calendar. (See *Understanding Permissions* at the end of this handout for more information on making someone your delegate.) Outlook 2007 has two ways to share your calendar: by email and online.

Share Your Calendar By Email



You can send your calendar – or any calendar you own -- in an e-mail message as a Calendar Snapshot. The calendar appears in the body of the email so the recipient can easily print it. If your recipient uses Outlook 2007, they can open the attached calendar file as an Outlook calendar.

With the calendar open, click the Send Via Email link in the Navigation Pane to open the dialog box.

Share Your Calendar Online

Use the Microsoft Office Outlook Calendar Sharing Service to share calendars on online with other people. You control who views the calendar. Here are the steps:

1. In Calendar, in the Navigation Pane, right-click the calendar you want to publish.
2. On the shortcut menu, point to Publish to Internet, then choose Publish to Office Online.

If this is the first time you have published a calendar to Office Online, you must register for Office Online by using your Windows Live ID account. If you do not have a free Windows Live ID account, you can create one. Follow the instructions on your screen.

3. In Time Span, select the number of days of calendar you want to share.
4. Click the arrow and choose the amount of Detail you want to share. Enable the Show Time Within My Working Hours Only check box to only share your working hours.

To set working hours, choose Tools > Options. In the Options dialog box, click the Calendar Options button on the Preferences tab.

5. In Permissions, choose whether your calendar information can be viewed only by specified people or searched and viewed by anyone using Office Online. (If you are publishing a calendar that anyone can view, type a Description of the calendar so others can find it online.)

By default, the calendar will be periodically updated. Changes to the calendar are published to Office Online during the next manual or automatic send/receive. Calendars are updated every half hour. If you don't want to update this calendar, click the Advanced button and choose Single Upload: Updates will not be uploaded.

6. Click OK to close the dialog box and publish your calendar.

After your calendar is successfully shared on Office Online, you can invite people to view and subscribe to the calendar. Click Yes when prompted to send a sharing invitation.

Email Tips and Tricks

Create a Contact from an E-mail Address

In an email message, right click any addressee (To, From, Cc, Bcc) and choose **Add to Contacts** to open a Contact form.

Delete an Email Address from the AutoComplete List

When you begin typing an email address or contact in the To, From, Cc, or Bcc boxes, Outlook displays an AutoComplete list. To remove an email address from the list, simply select it and press Del.

Create New Items from Existing EMAIL Items

Drop an email message on the Calendar to create a new appointment and save the text of the message in the appointment form. (Attachments are not included.)

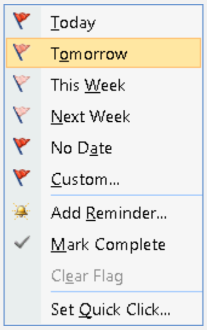
Drop an email message on Contacts to create a new contact for the sender and include the text of the message in their contact. (Attachments are not included.)

Integration with a Contact or Distribution List

- Drag a contact or distribution list item and drop it on the Calendar to create a meeting with the contact.
- Drop a contact on the Inbox to address a message to the contact.
- Drop a contact on Tasks to assign a task to the contact.
- Hold Ctrl and select multiple contacts to invite several people to a meeting or choose multiple recipients for a message.

Flag a Message for Follow Up

In Outlook 2007, a new Follow Up menu offers default time periods to choose from when you assign flags. Flagged messages appear in the To-Do Bar.



In the Inbox, click the follow up column to set the Quick Click flag to the message. Right click the column to choose a different flag or add a reminder. Click any flag to mark the item as complete. (If you mark a flagged message as complete in the To Do List or Tasks list, it will automatically be marked complete here as well.)

To assign your most frequently used flag to the Quick Click flag, right click the follow up column for any message and choose Set Quick Click from the shortcut menu.

In previous versions of Outlook, you could set the colors of flags and use them to sort and filter your mail, appointments, tasks, and contacts. In Outlook 2007, you'll find that functionality, and more, in categories.

Organize Outlook with Color Categories

Use Color Categories to easily identify and group associated items in Outlook. You can assign a color category to messages, notes, contacts, tasks, and appointments so you can easily organize them. In Outlook 2007, you can assign more than one color category to an item.

The colors are displayed in table views like the Inbox, and at the top of the message, contact, or other item when it is open. You can create a color category system that works for you by renaming the categories.

Tip: Use the Categorized Mail search folder (in the Search Folders list in the Navigation Pane) to view, sort, and group all your categorized mail items.

A color category must be listed in the color category list before you can assign it. There are several default categories, for example Blue Category. Rename the existing categories and create new categories to give them meaning in the context of your organization and your work.

Assign a Color Category to a Message

To assign a color category to a message in any list view:

1. Right click the message.
2. Choose Categorize then the color category from the shortcut menu.

To assign a color category to an open message: On the Message tab in the Options group, click Categorize then choose a color category.

Rename or Create a Color Category

The first time that you assign a default color category to an item, you will be prompted to rename the category. You can also change the color of the category and choose a keyboard shortcut. You can set the colors for default categories and create new color categories in the Color Categories dialog box.

1. Click Categorize on the ribbon and choose All Categories from the menu.
2. Click New to open the Add New Category dialog box.
3. In the Name box, type a name for the new color category.
4. Click the Color down arrow, choose the color that you want, and then click OK.

Organize Messages with Folders and Views

Create folders in your Inbox then apply rules to automatically organize messages as they arrive.

Create a Folder for Messages

1. Select the Inbox.
2. Right click the Inbox and choose New Folder
3. Enter a name for the folder.

Switch Between Views

To switch between views in any of the Outlook modules use the View List on the Advanced toolbar. (If the Advanced toolbar is not displayed, right click the Standard toolbar and choose Advanced.) Simply choose another view to apply it.

You can also change views by clicking the View Menu and choosing Current View. Views for the active module are displayed at the top of the submenu, with the current view checked.

Sort a Table View

Sort a table view alphabetically by clicking on a column heading. Click once to sort alphabetically A-Z and click again to sort Z-A. Hold Shift and click another heading for a multi-level sort.

If you wish to define multilevel sorts, choose View ➢ Current View ➢ Customize Current View, and click the Sort button. Choose up to four fields to sort by in ascending or descending order. Clear the sorting order by clicking the Clear All Button.

Filter Your Data

1. Choose View ➢ Current View ➢ Customize Current View.
2. Click the Filter button.
3. Search for specific words (names, companies, etc.) by entering the search criteria in the Search For Word(s) field.
4. Change the In Field drop down to indicate which field you expect to find the word for which you are searching.
5. Click OK to apply the filter. Then click OK again to close the dialog box.

To apply more specific filters, click View ➢ Current View ➢ Customize Current View and then click the More Choices or Advanced tabs. More Choices lets you define specific categories on which to filter or identify items that you have not opened (like email or notes posted by another user). The Advanced tab lets you define more complex filters by applying conditions such as contains, between, doesn't contain, is empty, etc. to the filters. It also lets you apply more than one filter to the data.

Click OK twice when you're done. The status bar (bottom of the Outlook window, above the Start button) shows whether or not you're viewing filtered data. If the status bar isn't displayed, click the View Menu and choose Status Bar.

Add Fields to a View

1. Choose View ➢ Current View ➢ Customize Current View
2. Click the Fields Button. The Show Fields dialog box opens, allowing you to select fields from the list on the left and/or remove fields from the list on the right.
3. Select an item from the fields list on the right to activate the "Move Up" and "Move Down" buttons. Note the fields displayed are based on categorizes in a drop-down list at the bottom left of the dialog box. Change the drop down category to see other field choices.
4. Click OK twice to close both dialog boxes and see the changes you've made.

Changes are automatically saved. In other words, the current view is now a customized version. If you don't wish to overwrite the original view, simply name the new view by clicking in the View list and typing a new name, and then press Enter.

If you don't name the custom view before switching to another view, the custom view overwrites the original view. If you wish to change the view back to its original settings, Choose View ➢ Current View ➢ Define Views, click the view you want to change back to its original settings and click Reset. Close the dialog box or select another view and click Apply View

Create and Use Rules

E-mail is both a blessing and a curse in today's business environment. It takes precious time and careful review to sort it all out by hand. However, if you let Outlook Rules handle your mail for you, you never have to worry about missing an important message or wasting time on worthless spam. This section describes how to create rules you can apply to handle your everyday mail and rules that work for you while you're away on that well-deserved vacation.

Use Colors to Organize Messages

Colors are an easy way to distinguish Outlook items that share a common attribute. Although you can apply colors manually, the real power of colors comes when you create a rule to apply colors automatically. Using colors you can create rules to color messages from or sent to a specific person and clearly distinguish messages sent only to you. To apply colors automatically, follow these steps:

1. Open the Ways To Organize Inbox pane by choosing Tools > Organize from the menu.
2. Click the Using Colors tab in the Ways To Organize Inbox pane.
3. Click the Automatic Formatting button at the top right of the Ways To Organize Inbox pane.
4. Click the Add button in the Automatic Formatting dialog box to create a rule that Outlook temporarily names “Untitled.”
5. Type a descriptive name for the rule.
6. Click the Font button and choose a font.
7. Click the Condition button to open the Filter dialog box. In the three tabs of the dialog box, set the filter conditions.
8. Click OK to create the condition.

Create A Rule by Example

The easiest rules to create are those you create using the Organize pane. Using the Organize pane you can create rules to automatically move messages to an identified folder. In this type of rule, you can choose to automatically move messages from a specific sender or to a specific recipient. To create a rule using the Organize pane, follow these steps:

1. From the Inbox or other Mail folder, choose Tools > Organize or click the Organize button  on the Standard toolbar to open the Ways To Organize Inbox pane.
2. Select the message you want to use as the example. For example, if you want to create a rule that automatically moves future messages from your supervisor to a folder named Important, select any current message from your supervisor.
3. Choose From or Sent To in the Create A Rule drop-down list to indicate which type of messages should be moved. If you don’t have a message from your recipient in any of your mail folders, enter the person’s name in the text box.
4. Use the Into drop-down list to select the folder where you want the messages to/from this person moved; if the folder doesn’t exist, click the New Folder button at the top of the Organize pane and enter a name for the new folder. Click OK to create the folder.
5. Click the Create button to create the new rule. You know it worked because it says Done next to the Create button. The rule is applied to all new messages you receive.

Use Junk Mail and Adult Content Rules

With Outlook, you can automatically color or even move junk mail messages to the Junk E-Mail folder – or right to your Deleted Items folder if you prefer -- so you don’t waste your time with them.

To format junk e-mail or adult content messages, click the Junk E-Mail tab in the Ways To Inbox Organize pane. Choose a color for each type of message (you can apply the same color to both), and then click the Turn On buttons. If you’d prefer the messages were deleted or placed in a specific folder, choose Move from the drop-down list and then select the folder to which you would like the messages moved.

Use the Rules Wizard to Create Complex Rules

1. Open the Inbox and choose Tools ➢ Rule and Alerts.
2. Click New Rule and choose to create a rule from one of the templates or Start with a Blank Rule. We recommend you use a template until you are comfortable creating rules.
3. Click an underlined value in the Rule Description to edit the rule. For example, if you are using the Move New Messages From Someone template, then click People or Distribution List and select the address of the person or distribution list that originates the mail. Then click Move It To The Specified Folder and select the folder you want to mail to move to. You can also create a new folder by clicking the New button on the Rules Wizard dialog box that opens.
4. After you specify the Rule Description, click Next.
5. Select any conditions you want checked before the rule is applied. For example, if you only want the mail from this sender moved to the folder you specified if it is addressed only to you, click the Sent Only To Me checkbox. You can apply several conditions to each rule you create. For example, From People or Distribution is already selected based on the template you chose in Step 2. If an additional value is required based on your choices, the value is underlined in the Rule Description section at the bottom. After you set the conditions and additional descriptions, click Next.
6. Choose what you want to do with the message. In the example we are using, Move It To the Specified folder is already selected. You can choose to also have it forwarded to someone else, notify you with a specific message or a number of other actions. Remember to identify any values in the Rule Description box if the action you choose requires more detail. Click Next.
7. Identify any exceptions to the rule. For example, perhaps you don't want the message moved to the specified folder if it is marked with High Importance. To designate this, select the Except If It Is Marked As Importance exception. After you set any exceptions, click Next.
8. Enter a name for the rule and indicate if you would like to run the rule immediately on messages in the Inbox. This is a great way to test the rule to see that it does what you want it to. Click Finish to return to the first Rules Wizard screen.
9. Repeat steps 2-8 to create additional rules.

You can change the order in which rules are processed so that a message that might be affected by more than one rule is handled on a priority basis. Click the Move Up and Move Down buttons to rearrange rules.

If you'd like to turn a rule off without deleting it, clear the checkbox in front it. You can then reselect it when you want to rule to run again.

Use the Out of Office Assistant and Out of Office Assistant Rules

When you are going to be away for the office, use the Out of office Assistant to notify senders that you are gone, forward specific messages, or otherwise handle your incoming mail. You must be logged onto your network to modify settings or turn on the Out of Office Assistant, so do the following *before* you leave the office:

1. Switch to the Inbox or any mail folder.
2. Choose Tools ➢ Out of Office Assistant.

NOTE: The Out of Office Assistant is a feature of Outlook in a Microsoft Exchange environment. If Out of Office Assistant is not an option on the Tools menu, you are not using Microsoft Exchange. If Out of Office Assistant is a choice, but not currently available, you are not online.

3. Enter the message you want senders to receive while you are away. (Each sender will only receive the message in response to the first message they send.)
4. Click the Add Rule button and set up a rule that identifies what you want to happen with mail you receive. For example, you can create a rule to forward messages from a specific person to your home e-mail address or you can set up a rule to reply to a specific sender with a template.
5. Click OK when you have finished creating the rule.
6. Repeat Steps 4 and 5 to create additional rules.
7. Click the Move Up and Move Down buttons to change the order in which the rules are applied.
8. Select I Am Currently Out of the Office to apply the Out Of Office Assistant.
9. To turn off the Out of Office Assistant, choose Tools ➢ Out of Office Assistant and select I Am Currently In the Office.

DELETE AN OUT OF OFFICE RULE

1. On the Tools menu, click Out of Office Assistant.
2. In the These rules will be applied to incoming messages while you are out of the office box, choose the rule that you want to delete. Click Delete Rule and then click Yes.

EDIT AN OUT OF OFFICE ASSISTANT RULE

1. On the Tools menu, click Out of Office Assistant.
2. In the These rules will be applied to incoming messages while you are out of the office box, click the rule that you want to edit, and then click Edit Rule.
3. Make changes to the conditions and actions for the rule.

BONUS OUTLOOK CONTENT: Understanding Permissions

Outlook has two ways to grant access for someone to view your Outlook folders: Permissions and Delegates. If you are being given access to someone e-mail folder, be sure to ask to be made a delegate. You should never impersonate another user by sending e-mail as if it is from them, even if they have given you permission to do so! Delegate rights protect you by making it clear you are acting on behalf of the other person. Delegate permissions must be set up by the person granting permissions.

Follow these steps to make someone your delegate:

1. Click Tools ➢ Options and click the Delegates tab.
2. Click Add to open the Add Users dialog box.
3. Select the user(s) you want to give the same delegate permissions to and click the Add button to add them to the list. Click OK.
4. Select the level of permissions you want to grant for each of the Outlook folders. To automatically have a delegate receive all meeting related messages sent to you, choose Editor permissions on the Calendar and check the Delegates Receive Meeting-Related Messages Sent to Me checkbox.
5. At the bottom of the dialog box, enable the Automatically Send a Message To Delegate Summarizing These Permissions checkbox. When you close the Options dialog box, Outlook sends all delegates a message summarizing their delegate status.
6. Click the Delegates Can See My Private Items checkbox if you want your delegates to see items you have marked as private.

7. Click OK. On the Delegates tab of the Options dialog box, you can choose if you would like to have meeting-related messages sent only to your delegate and not to use, just click the corresponding checkbox.

Tables in Excel 2007

There are some powerful new features that are almost hidden in Excel 2007. Excel databases (called **lists** in Excel 2000-2003) are called **tables** in Excel 2007, and they aren't on the Data tab where you'd expect them to be. To use a set of data as a table, first make sure that the range doesn't include any blank rows or columns. Make sure each column has a unique heading. Then select any cell in the range and on the Home tab click Format As Table. Choose any table layout (Live Preview doesn't work until after you format the range as a table). Several things will happen:

- The formatting you selected is applied
- A drop down menu with sorting and filtering options is added to each column
- The Table Tools tab appears above the ribbon

Click the down arrow to sort or filter by the contents of a column. Don't miss the new filter options – especially the Text Filters, Number Filters, and Date Filters menus. You can also sort and filter by color.

Click the Table Tools tab to name the table, change styles and set formatting options.

Conditional Formatting in Excel 2007

Don't format cells manually! Use conditional formatting, and when the cell's value changes, so does the formatting. There are two reasons conditional formatting is used: for **analysis** to spot trends or outliers, and to visually illustrate data for reporting and/or **presentation**.

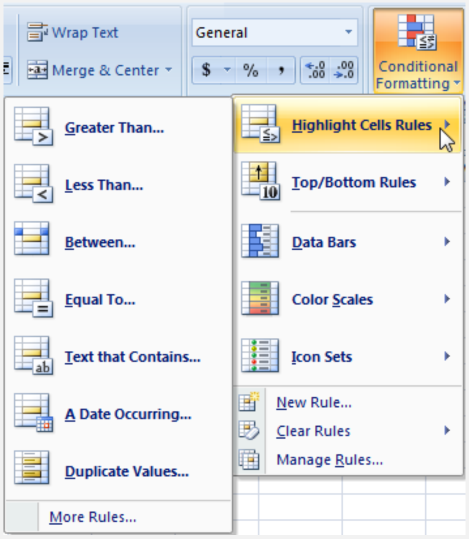
There are two types of conditional formatting, and four kinds.

- Types: Formatting based on cell contents, Formatting based on a formula
- Kinds: Highlight, Data Bars, Icon Sets, Color Scales. Color Scales are rarely used for presentation.

Formatting a Cell Based on Its Contents

Using Rules to Highlight Data

1. Select the cells you want to format (remember you can hold Ctrl to select contiguous ranges).
2. On the Home tab click Conditional Formatting.
3. Choose from the Highlight Cells Rules or Top/Bottom Rules.



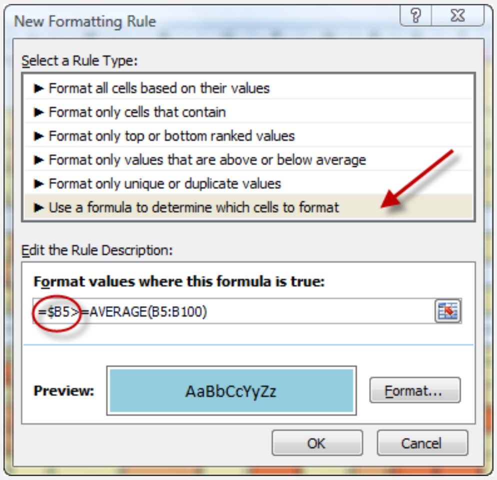
Using Data Bars, Icon Sets, and Color Scales

1. Select the cells you want to format (remember you can hold Ctrl to select contiguous ranges).
2. On the Home tab in the Styles group, click Conditional Formatting.
3. Choose Data Bars, Color Scales, or Icons Sets
4. Select a specific bar, scale, or icon set.

Deleting a Conditional Format

1. Select the cells you want to remove conditional formatting from.
2. On the Home tab in the Styles group, click Conditional Formatting.
3. Choose Clear Rules then Clear Rules from Selected Cells or Worksheet.

Formatting a Cell Based on a Formula



1. Select the cells you want to conditionally format.
2. Choose Conditional Formatting > New Rule to open the New Formatting Rule dialog box.
3. Select the last rule type, *Use a Formula to determine which cells to format.*
4. Type an = then create a formula for the cells in the first row. The formula must return either TRUE or FALSE (like an IF function). Excel will enter cells you select as absolute cell references with a $ before the column and row (for example, **A1**). If you are formatting the cells in a row based on the value of a cell in the row, delete the $ in front of the row (for example, **$A1**). If you are formatting all the selected cells based on a comparison to another cell, delete both $.
5. Click the Format button and choose a format. Click OK to apply your formatting.

Themes and Templates in PowerPoint 2007

Microsoft Office PowerPoint 2007 contains several built-in themes -- combinations of theme colors, theme fonts, and theme effects-- which include theme colors , theme fonts, and theme effects. Themes replace part of the functionality of the design templates used in earlier versions of PowerPoint.

Apply a Theme

On the Design tab, in the Themes group, choose More, then:

- To apply a built-in theme, under Built-In, click the theme that you want.
- To apply a newly-created theme or an existing theme that you modified and saved, under Custom, click the theme that you want. (Custom is available only if you created a custom theme.)

Customize a Theme

PowerPoint 2007 includes several predefined themes, but you can also create your own by customizing an existing theme and then saving it as a custom document theme. You can share PowerPoint themes with Word 2007, Excel 2007, and other Office programs to give your Office documents a uniform look.

To customize a theme, you start by changing the colors, the fonts, or the line and fill effects that are used. If you want to apply these changes to new presentation slides, you can save them as a theme (.thmx).

CUSTOMIZE THEME COLORS

Theme colors contain four text and background colors, six accent colors, and two hyperlink colors. The colors in the Theme Colors button are the current text and background colors, and the set of colors next to the Theme Colors name after you click the Theme Colors button are the accent and hyperlink colors for that theme. To customize theme colors:

1. On the Design tab, in the Themes group, click Colors.
2. Click Create New Theme Colors.
3. Under Theme colors, click the button next to the name of the theme color element that you want to change.
4. Under Theme Colors, click the color that you want to use.
5. Repeat steps 3 and 4 for all of the theme color elements that you want to change.

6. In the Name box, type an appropriate name for the new theme colors, and then click Save.

TIP: If you change your mind and want to discard your changes, click Reset before you click Save.

CUSTOMIZE THEME FONTS

Theme fonts contain a heading font and a body text font. When you click the Theme Fonts button , you see the name of the heading and body text fonts used for each theme font below the Theme Fonts name. You can change both of these fonts to create your own set of theme fonts:

1. On the Design tab, in the Themes group, click Theme Fonts.
2. Click Create New Theme Fonts.
3. In the Heading font and Body font boxes, select the fonts that you want to use.
4. In the Name box, type an appropriate name for the new theme fonts, and then click Save.

CHOOSE THEME EFFECTS

Theme effects are sets of lines and fill effects. When you click the Theme Effects button , you see the lines and fill effects used for each set of theme effects in the graphic displayed with the Theme Effects name. Although you cannot create your own set of theme effects, you can choose the one that you want to use in your own document theme. Follow these steps:

1. On the Design tab, in the Themes group, click Theme Effects.
2. Click the effect that you want to use.

Save a Theme

You can save any changes that you make to the colors, fonts, or line and fill effects of a theme as a new custom theme that you can apply to other documents or presentations. Follow these steps:

1. On the Design tab, in the Themes group, click More.
2. Click Save Current Theme.
3. In the File Name box, type an appropriate name for the theme, and then click Save.
4. The custom theme is saved in the Document Themes folder as a .thmx file and is automatically added to the list of custom themes.

About PowerPoint Templates

PowerPoint 2007 templates structure the position of elements, such as title and subtitle text, lists, pictures, and AutoShapes on a slide for all or part of your presentation. You can store and reuse templates to make new presentations, and each template can serve a different purpose. Templates place certain types of content in areas that you designate.

For each template, you can define the formatting of a slide by creating and customizing one or more slide masters. Slide masters can include placeholder size and positioning for one or more layouts, placeholder text styles, backgrounds, theme colors, animations, and custom content that pertains to the template.

Create a PowerPoint Template

To create a template, open a blank presentation, and then do the following steps:

1. On the View tab, in the Presentation Views group, click Slide Master.
2. On the Slide Master tab, in the Edit Master group, click Insert Slide Master.

NOTE: Many presentations contain more than one slide master, so you may have to scroll to find the one that you want.

To customize your slide master, do one or more of the following:

- To remove any of the built-in slide layouts that accompany the default slide master, in the slide thumbnail pane, right-click each slide layout that you want to delete, and then click Delete Layout on the shortcut menu
- To remove an unwanted, default placeholder, in the slide thumbnail pane, click the slide layout that contains the placeholder, click the border of the placeholder, and then press Delete.
- To add a placeholder, in the slide thumbnail pane, click the slide layout that you want to contain the placeholder, and then do the following:
  - On the Slide Master tab, in the Master Layout group, click Insert Placeholder, and then click the type of placeholder that you want.
  - Click a location on the slide master, and then drag to draw the placeholder.
- To apply a theme to your presentation, on the Slide Master tab, in the Edit Theme group, click Themes, and then click a theme.
- To change the background, on the Slide Master tab, in the Background group, click Background Styles, and then click a background.
- To set the page orientation for all of the slides in your presentation, on the Slide Master tab, in the Page Setup group, click Slide Orientation, and then click Portrait or Landscape.
- To add text or a graphic (logo) that appears as a footer at the bottom of all of the slides in your presentation, do the following:
  1. On the Insert tab, in the Text group, click Header & Footer.
  2. In the Header and Footer dialog box, on the Slide tab, select the Footer check box, and then type the text that you want to appear in the center bottom of your slides.
  3. Click Apply to All.

To save your template:

1. Click the Microsoft Office Button, and then click Save As.
2. In the File name box, type a file name.
3. In the Save as type list, click PowerPoint Template, and then click Save.