Office 2010:
How to Win with Office 2010

Techedutainment Services

Written and Presented by:
Greg Creech

Welcome to your new Office!

Table of Contents

Oops! and Legal Stuff

While I have made every effort to ensure the accuracy of this document, including grammar and instructions, I make mistakes. (Surprise!) If you find an error or want to provide constructive feedback, please contact me. Thank you! Enjoy Your new Office and this document.

Greg Creech
Techedutainment Services, Inc.
P. O. Box 1431
Pine Lake, GA 30072
www.gregcreech.com
- ✓ Former National Speakers Association Member
- ✓ American Society of Training and Development Member
- ✓ Society for Human Resources Management
- ✓ International Association of Administrative Professionals
- ✓ Georgia Municipal Association

Word ® is a most excellent product from Microsoft ® Corporation and is part of the Office ® Suite (including Office 2007/2010 ® of products and services, including Excel, PowerPoint, Access, and other fantastic programs that help me to be productive and profitable.

Introducing Greg Creech

Shop Talk from The Atlanta Journal-Constitution
Sunday, Oct. 29, 2000 **R3 - JOBS**

Why I Love my Job – Greg Creech

What I Do: I teach technology courses and make presentations to beginner and expert computer users and professionals. I use humor and the piano. I train all levels from first-time computer users to systems technicians acquiring A+ certification. As an A+ certified trainer, MOUS expert, and technical trainer, my certifications and knowledge give me a career in the technology. My humor, the piano, and people keep me in the technology training field. I sing to my students sometimes and perform stand-up comedy about computers.

Technology speaker and trainer Speakin' & Geekin' Pine Lake

How I got started: I won Best Actor in a Supporting Role at Southside Theatre Guild for *"A Funny Thing Happened on the Way to the Forum"* and studied comedy under Jerry Farber. I have played the piano since 8 years of age and had the first personal computer with a 1 MB of memory. In order to learn the PC, I associated the PC with the piano -- both use a language to translate, both have keyboards, and now - both provide music and information. I must admit I miss the days when I only played the piano and programmed the PC. Now, I play the PC and have to program my piano. In 1998 after seventeen years of technology business experience in the corporate market, I decided to take a leap of faith on my own. I call my presentations "Showminars," a combination of a show and a seminar.
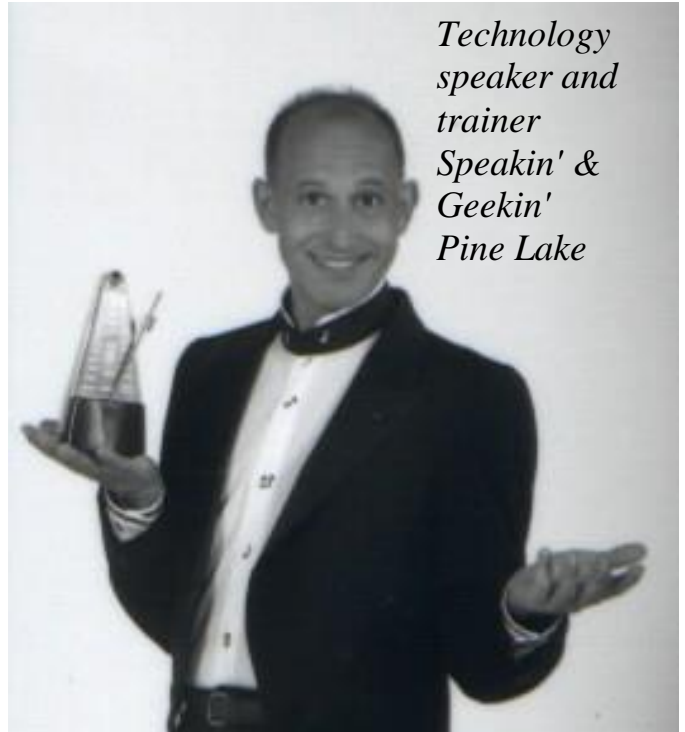
... sings to his students, and often he performs stand-up comedy about computers.

The Best Part: Hearing the laughter and the comments: "You have saved me so much time," and "I remember complicated macros because of the way you taught them." I have a passion for teaching creative people to be more technical and technical people to be more creative – Mozart would be proud!

The Challenging Part: Explaining why I want my piano in a PC classroom. "Mainframers" who refuse to acknowledge the existence of the PC and the Web. People who attend training classes because they have to, not because they want to. Technical people who are not client- focused.

My Favorite Quotes: "To err is human, to really mess things up you need a computer." "Forty-two percent of all households have a computer; only eight percent of those know how to use it."

What Keeps me Going: I enjoy combining my love of people, the piano, processors, and humor into a unique speaking and learning experience.

Welcome!

Move into your new Office

Not since we moved from command codes to icons in the early 1990's have I been this excited about a version of Office and neither has there been a more magnificent change to the Office system. We have new, task-oriented interface and enhancements to all products within the suite. You'll find getting to "advanced" features easier, such as Mail Merge in Word, Custom Animation in PowerPoint, and PivotTables in Excel. Also, with the popularity of tables and data tracking the products, particularly Word and Excel's tables, Microsoft has added more capabilities and formats for creating, editing, and using tables.

Since you are a current Microsoft Office 2003/2007 user, you will, like me, need some time adjusting to where items were in previous versions of Office and where items are in the new version of Office, especially if you are moving directly from Office 2003 to 2010 and bypassing Office 2007. Don't worry if you experience lapses in productivity in finding items and knowing if Microsoft has removed or simply moved the item to a new location that it the purpose of this book and course to help you know the differences and quickly get up to speed in using the new interface and popular features both from Office 2003 and Office 2007 migration.

As with any new version of software and products there are some negative issues to address. One example for Office 2007/2010 is backward compatibility – to open a file saved as a 2007/2010 file in a previous version of Office requires a converter. You can save the file as a previous version of Office, such as 97 – 2003; however, you lose the XML format, other formatting, and powerful features of 2007.

Your new Office is ready, let's move in.

About this Course. . .

I designed this course and book only for ***current Microsoft Office 2003 and 2007 users*** regardless of the previous version whether Office. This book is not designed for people who are completely new to Office – I have other books and courses for new users. We will compare the differences in previous versions with the new version so you'll know

where your important icons, menu items, and commands are located in the new Office. We'll look at the similarities with the Office 2007/2010 and previous versions, too, such as the good, old Keyboard Shortcuts. While some organizations migrated to Office 2007, many have not migrated to 2007 and will lead directly into Office 2010. Those clients that did migrate did not fully utilize the new interface nor use many productive shortcuts that I have included in this book.

We will examine Word, Excel, and Outlook and the common features in all of the Office Suite and then we will look at specific changes to Word, Excel, and Outlook. This book will not be exhaustive in your quest for knowledge and being a poweruser but does give you a quick start and reference for using the new interface, command buttons, and making you more productive quicker. This book will help you determine where you may need to continue your education, such as in Excel. However, this book may be all you need for your transition to the new Office.

Enjoy your course and your new knowledge in Office 2010.

Now, let's get started winning in Office 2010.

♫***Write your notes here:*** _____

_____

_____.

SOS! Help!

Whatever happened to *Links the Cat* and *Clippit*? ***Microsoft has laid off (or fired) your Office Assistant or as the Help system so kindly displays "Removed from product"!*** For years, clients have loved or adamantly hated the Office Assistant – I used the Office Assistant when needed but some of my clients kept the Assistant open all of the time – no more. In fact, Microsoft has removed some of the more "fun" and creative aspects of the applications, such as Text Effects in Word. Also, gone with Office 2002/2003 is the Office Toolbar.

With this version of Office you will definitely need to use and know *the Help system*. A very important item in your Help system is where items were in previous versions of Office and where items are now in the new version. I use this a lot in trying to search where items are located in the new version. Pictured at right is how I discovered the untimely removal of the Office Assistant and WordPerfect Help is gone, too.
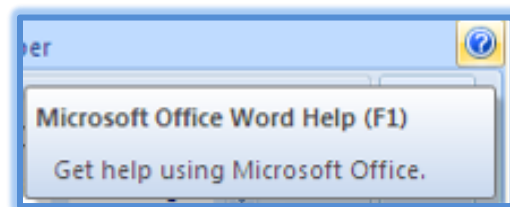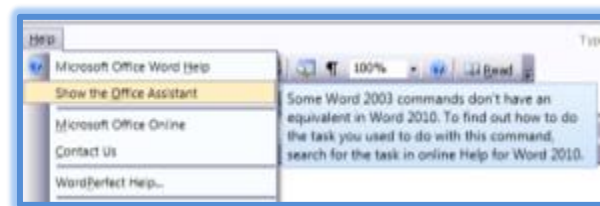
Thankfully we may still press the F1 key on our keyboard to quickly access help and we my click the Help command button (Microsoft uses the words command button to replace the use of the word "icons".) The command button is at the upper right corner of the applications' screen and displays here for you with the screen tip. This activates the menu at right.. I have entered "**2003 Commands**" in the box and searched on those words. Please ensure that you are connected to the Office help system online. The lower right message
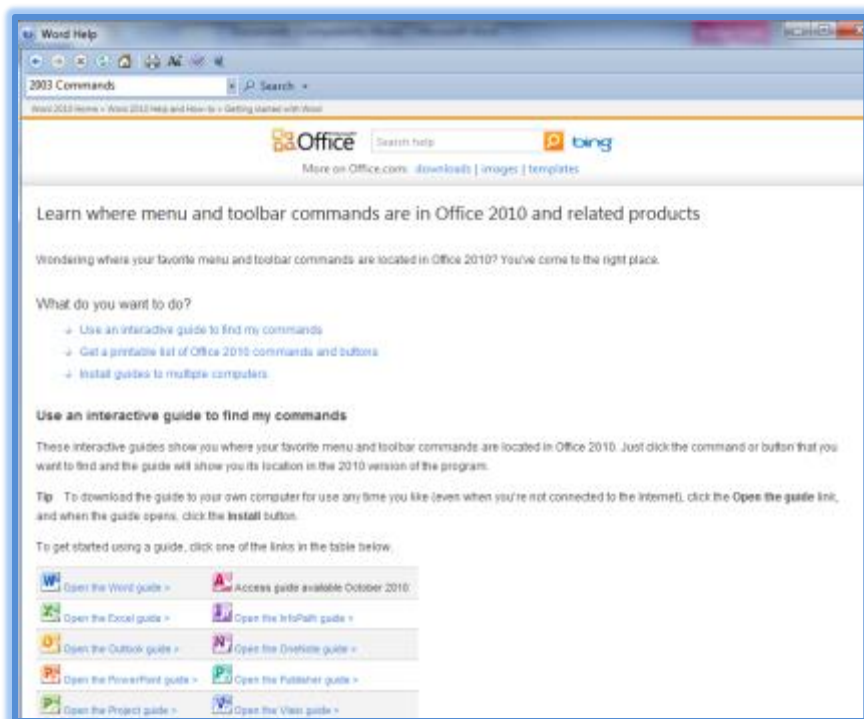
box informs you of where you are retrieving your help. The Interactive Guide only

operates when you are online with
Office help. Microsoft Office has
done a good job of introducing
you to the interface and provides
the correct names of items, such
as Ribbons and Groups. I
navigated to the site through
Getting Stared with Word 2010,
but this is available to all
applications and you choose your
application from the menu
pictured on the previous page. After searching for *2003 Commands* and at the *Getting Started* pane, Click this hyperlink to activate the Start the guide screen – You may need the Adobe Flash Player.

☛ A Hot Tip! In the Start the guide window, there are other options for you to use rather than the Interactive Guides. You may download a printable list of Command Buttons and the Ribbon in Excel. ☛

After clicking the Start the guide item, the Welcome screen
appears for you to Start your 2003 to 2010 command
reference guide. Click Start and the interactive guide installs
and is ready for you to choose a menu item and have the
system alert you where the item has moved in 2010. I
have chosen Insert, Picture, from file and a screen tips
alerts me as to where this item is in Office 2007/2010.
Also, if I **click** the From File item, the guide demonstrates
where the item is in Office 2007/2010 for me. This is a
really neat and easy to use method of knowing where your
commands are located and if Microsoft has removed an
item from the application. *Enjoy!*
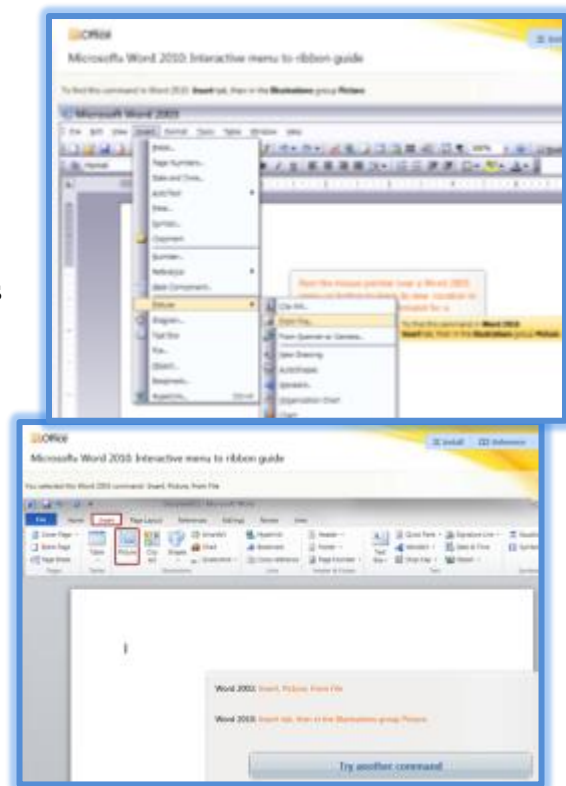
New File Formats

With the new Office comes new file formats for the applications. Since Office has converted *to Extensible Markup Language (XML)* as the file format and uses XML technology, the formats and extenstions needed changing too. Using Extensible Markup Language reduces files size, risk of corruption, and prevents viruses from embedding in the code or macros. ***Each application saves NEW files in the 2007/2010 format***. If you need to share your 2007/2010 files with users that do not have Office 2007/2010 there are a few options for you:

✓ The user can use the Office converter to convert to the 2007/2010 File Type to view and edit the file in their version; BUT if they save the document in the earlier version the file looses the 2007/2010 formatting and features.

✓ You can save two copies of the document using Office 2007/2010 and the Save As feature. One copy would be your 2007 version with all of the formatting and features of 2007 and the second copy would be another version, such as 97 – 2003, with limited functionality and updated features. This may become cumbersome for you to maintain two copies and two versions of the file. I use my 2007 version as the main version and as I make changes I use Save As to save the updated file using a different name to the 97 – 2003 format. Overwriting and using the wrong file can occur and maintaining two copies may be confusing.

✓ When you save a file in 97 – 2003 version, your file displays Compatibility Mode on your title bar.

✓ There are conversion problems between Office 2010 and Office 2007, too. Some of the fancy and wonderful text effects in Word 2010 don't convert well to Word 2007.

✓ The Table below displays the type of files and the new formats/extensions for you to save your document, workbook, or presentation.

☹ **An Important Gotcha! If you are working on a 97 – 2003 version of a file in Office 2007/2010, some of your command items and buttons will not be active (or "grayed out"). You may not use all of 2007/2010 features and formats if previous versions of a file. Your conversions to the new format**

won't be without some headaches, too. I have had to work in a dual format and it can be confusing and frustrating between different versions of the file. I look forward to the day when Office 2007/2010 is the standard. ☹

| Office Files and Extensions/Formats	
Type of File	**New Extension/Format**
97-2003 Word Document	.doc
97-2003 Word Template	.dot
2007/2010 Word Document	.docx
2007/2010 Word Document with Macros/Code	.docm
2007/2010 Word Template	.dotx
2007/2010 Word Template with Macros/Code	.dotm
97-2003 Excel Workbook	.xls
97-2003 Excel Template	.xlt
2007/2010 Excel Workbook	.xlsx
2007/2010 Excel Workbook with Macros/Code	.xlsm
2007/2010 Excel Template	.xltx
2007/2010 Excel Template with Macros/Code	.xltm
97-2003 PowerPoint Presentation	.ppt
97-2003 PowerPoint Template	.pot
97-2003 PowerPoint Show	.pps

|	
2007/2010 PowerPoint Presentation	.pptx
2007/2010 PowerPoint Presentation with Macros/Code	.pptm
2007/2010 PowerPoint Template	.potx
2007/2010 PowerPoint Template with Macros/Code	.potm
2007/2010 PowerPoint Show	.ppsx
2007/2010 PowerPoint Show with Macros/Cod	.ppsm
There are many other formats available for each application, such as Web Page, Text, RTF (Rich Text Format), and so on.	

The New Interface

One of the best new features of **Office 2007/2010** is the new **user interface** including the **Quick Access Toolbar, Tabs, and Ribbon**. Microsoft calls this type of interface a results-oriented interface and I must agree – you truly will get to your desired results, effects, and functionality with less time and minimized frustrations – for the most part. The number of **dialogue boxes** has decreased and **Task Panes** are still around to assist you. The good old toolbars, such as Standard and Formatting, that us old-timers have used since the early 1990's are gone, except for one – the new **Quick Access toolbar**. Without a doubt using the new Office Suite will increase your productivity and make getting to functions much easier and with fewer clicks and less frustration. The **Home Tab** in **Word 2010** displays here with the **Quick Access Toolbar** below the Ribbon and
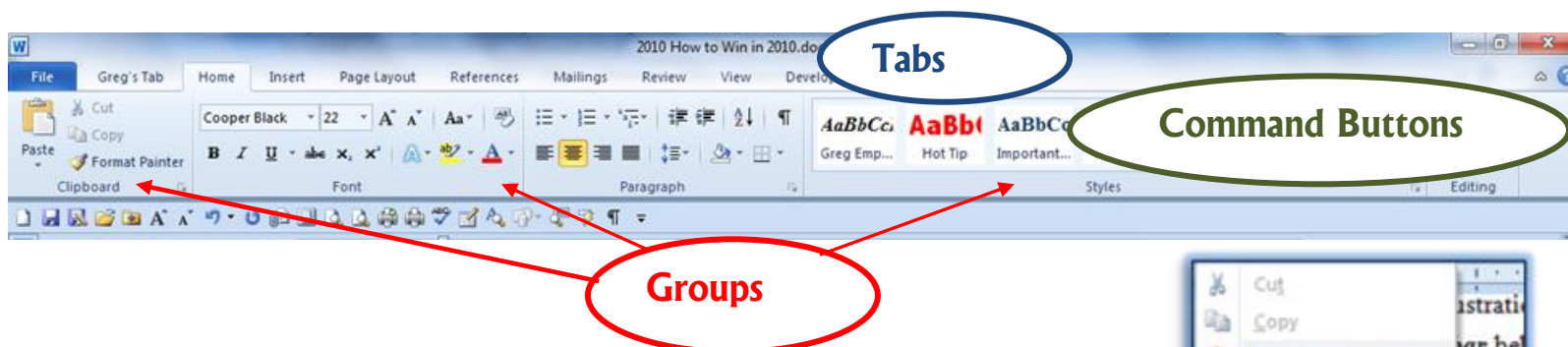
above the Ruler and the **Home Tab's Groups and Command Buttons** displayed.

Besides the increase functionality using the **tabs** and ribbon, there is new power in using the shortcut menus with "right clicking" or using the secondary mouse button.   When you "right click" or use your secondary mouse button you still receive the **Shortcut menu** including some of your favorite commands, such as copy and paste. Also you receive a **Mini Toolbar** containing favorite commands to use such as font, bold, the format painter and other often used commands. This is another time saving feature for applying formatting to selected areas of your document, spreadsheet, presentation and other Office files.
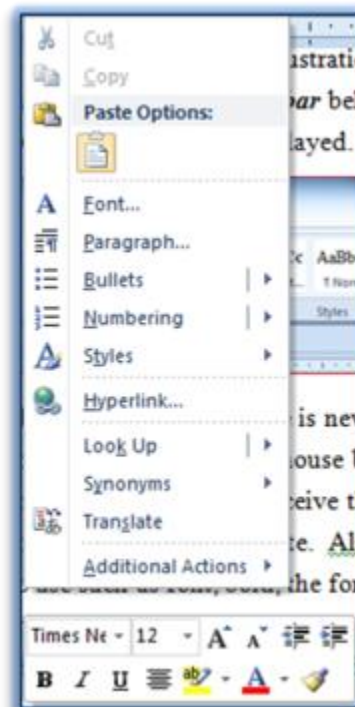
There is the new scrolling **Zoom**, replacing the **Zoom box**, in the status bar of all applications that changes your view as you scroll through your percentages. A

picture of the new scrolling zoom is at right and allows you to
see your changes in "real time" rather than guessing the
percentage you need.
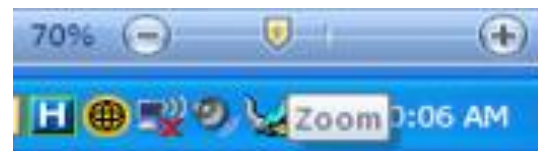
Office 2007/2010 offers a preview of your formatting, too, such as when you select your
text and scroll through the fonts or font size the application will show you the effect
changes before you make your final click or selection. This feature is called ***Live
Preview*** and saves a lot of time.

We will examine these ***new user interface features*** and new ways to getting to old
functionality, such as how the tabs and ribbons work in using popular formatting options
for your documents, spreadsheets, and emails. We will look at common features across
the new Office 2007/2010, such as the ***return of File in Office 2010, Customizing the
Ribbon,*** and ***the Quick Access toolbar***. Then we will examine some of the new
functionality in Word, Excel, and Outlook using the new interface.

Welcome to your new office, now let's get familiar with our new surroundings, and
interface.

Quick! Access the Toolbar

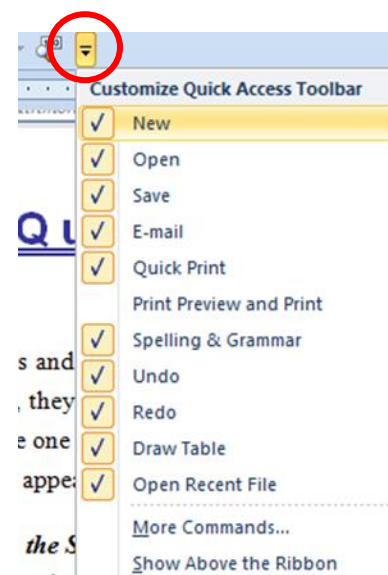## The Quick Access Toolbar in Word

For years and years we have used many toolbars in the Office Suite, gone are all of the toolbars, they are replaced with the tabs and pop-up dialogues boxes and task panes. We still have one toolbar available for us to put our favorite commands. The **Quick Access Toolbar** appears at the top your screen and pictured here.

This has *the Save, the (Very Popular) Undo, and Repeat command buttons* on it. You can customize the **Quick Access Toolbar** easily. We'll add some of my often used icons and actions to the toolbar – I encourage you to play around and add your own favorite icons.

Here's how to customize the Quick Access Toolbar using Customize Quick Access Toolbar:

1. **Click on the Drop Down arrow at the end of the toolbar and in the cascading menu choose some of your often used items, such as Quick Print and Print Preview. Clicking these items adds them to your Quick Access Toolbar.**
2. **Unfortunately, you must keep opening the menu to add the buttons; the cascading menu doesn't remain open as you click all of your buttons. I have added all of my buttons to the Quick Access toolbar.**

Now, we will use the More Commands item in the Quick Access Toolbar. You want to use the More Commands and Customize panes for two reasons:
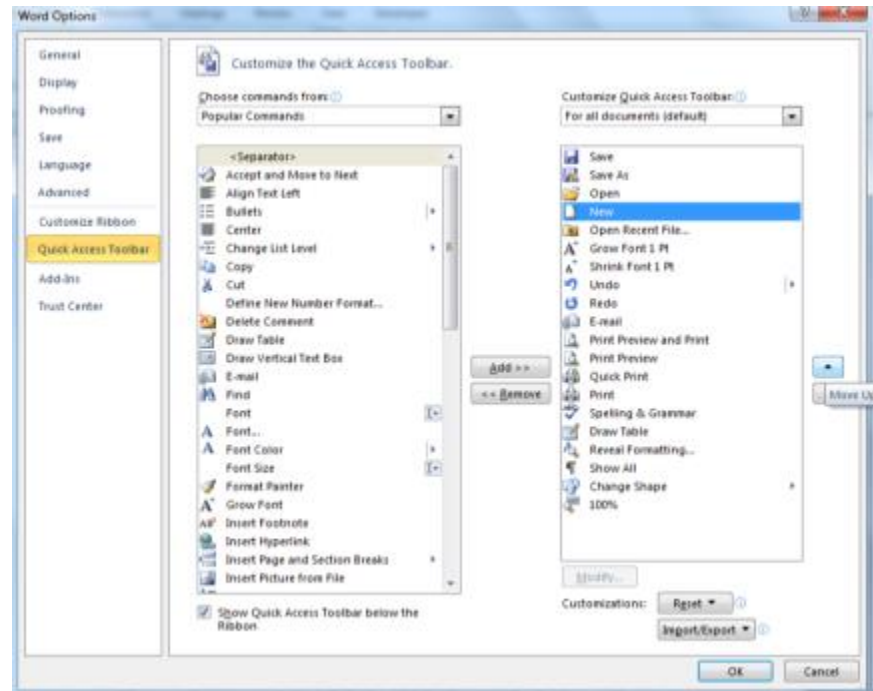
✓ **You can add more than one button at a time and you may add buttons not in the ribbon,**

✓ **You can re-order the buttons to suit your needs.**

Greg Creech
www.gregcreech.com

1. To add other favorite command buttons click the More Commands ... item on the Customize Quick Access Toolbar menu.

2. The Word Options Quick Access Toolbar Customize screen appears pictured at right.

3. First, I reorder my commands buttons to match how I had them for over 19 years using the Standard toolbar, so I move New to first place, Save and Save As are next, followed by Open, and then Undo, my favorite button. You will want to move your buttons to suit your needs and productivity in locating a popular command quickly and easily no matter what tab you may use in the Ribbon.

4. If you want to move the button, select it and click the up or down arrows at the right of the buttons for your toolbar. This will move your selected command up or down on your toolbar.

5. Next Select Copy from the Popular Commands pane and add it to your Quick Access Toolbar – Notice that wherever your cursor or selector was located in the Customize Quick Access Toolbar pane Office adds the button beneath your cursor/selection.

6. You may add your favorite buttons by double clicking the item, such as Font or Font Color, or selecting an item and clicking the Add button. Your buttons add below where your cursor/selection is in the Customize Quick Access Toolbar pane.
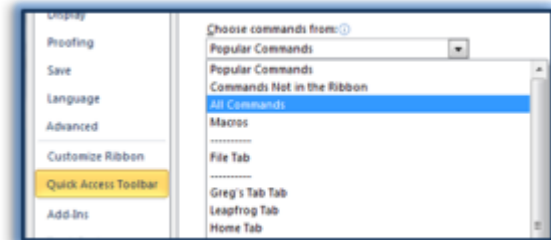
7. Notice at the top of the screen that we are making these changes to all of our documents (For all documents (default)). You can

create and modify your Quick Access Toolbar for different documents and needs.

Now, let's use All Commands and add some of my favorite buttons.

1. Change *Choose command from* box using the drop down list to All Commands.

2. Wow! There are a lot of commands in the Office Suite. We won't add all of these.

3. With an item selected in your All Commands pane, press the letter R on your keyboard – the Pane jumps to the letter R in the command list. Next you may use the scrolling bar or keyboard arrows to move through your commands. We want to add Reveal Formatting to our Quick Access Toolbar. Reveal Formatting isn't in the Ribbon and is a cool button to use in order to know all about your formatting and to compare different areas of the document's formatting differences.
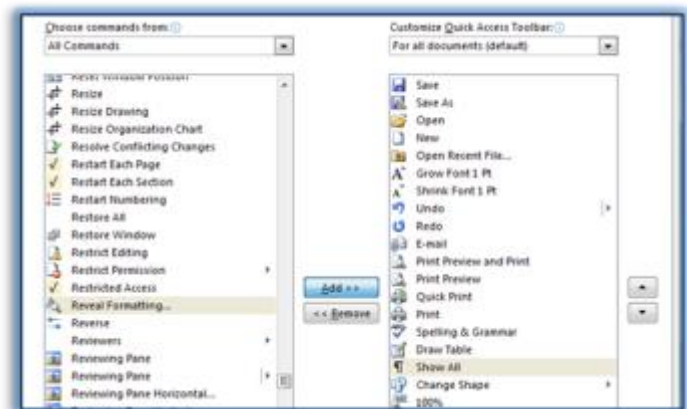
4. I add my favorite things in Word using the All Commands pane, such as:
   - ✓ Grow Font by 1 Pt,
   - ✓ Shrink Font by 1 Pt,
   - ✓ Change Case,
   - ✓ Change Shape,
   - ✓ 100% Zoom,
   - ✓ Open Recent File…
   - ✓ Speak
   - ✓ Reveal Formatting

5. Continue to add some of your favorite commands to the toolbar.

6. Don't forget to reorder them using the arrow buttons.

7. Once complete, click the OK button at the bottom of your screen.

Also, I like having my Quick Access Toolbar below the ribbon. You may place the Quick Access Toolbar below or above the Ribbon using the shortcut menu for the Customize Quick Access Toolbar that we have used previously. At the bottom of the pane, you may choose to Show Above/Below the Ribbon. I am changing mine to Show Below the Ribbon as displayed here.

☞ A Hot Tip! Adding buttons from a terrific shortcut menu! We can add any button on the Ribbon to our Quick Access Toolbar by right-clicking the button; in this case, I have my Show All button selected and right click on it to receive the shortcut menu that displays Add to Quick Access Toolbar. Note – If the Add to Quick Access Toolbar is grayed out – then you already added the button! Let's try it out. ☞

1. **With the Home Tab's buttons visible Right-click on one of your favorite icons – I'll right click the Show/Hide button.**
2. **From the menu choose Add to Quick Access Toolbar.**
3. **The icon displays on your toolbar at the end.**
4. **You can add and remove buttons with ease to and from your Quick Access Toolbar, using the shortcut menu. But you cannot rearrange them unless you use the Customize Quick Access Toolbar pane in the Options menu.**
5. **The shortcut menu on the Ribbon and Quick Access Buttons provide other options, too, such as Customizing and Minimizing the Ribbon that we will learn next.**

As you use your new Office, you'll discover buttons that you will want available all of the time. Unlike the previous versions of Office your *Home, Insert, Page Layout* and other tabs change your command buttons; therefore, to have a popular command constantly available without clicking a tab or right clicking, you'll have to add it to your *Quick Access Toolbar.*   You may assign your command to a *keyboard shortcut* or use one already defined for you such as the ever popular CTRL + C for copy.
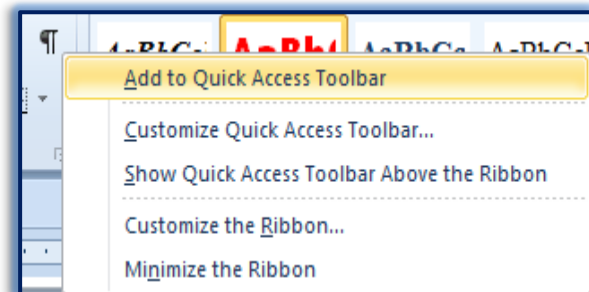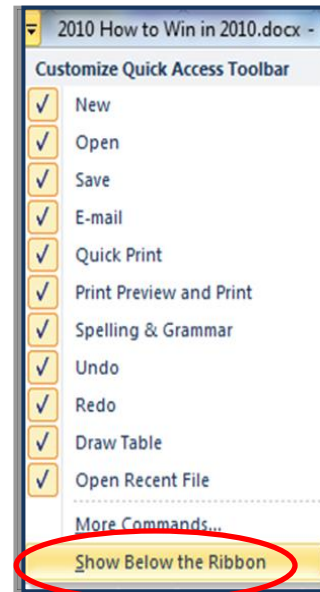
If you mess up your toolbar and want to put it back to the way the toolbar came from the Microsoft Factory or its original sate, in the ***Customization screen*** you can click the ***Reset button*** and Office provides this message. If you click the Yes button, all of your customization disappears for you to start fresh adding your icons.
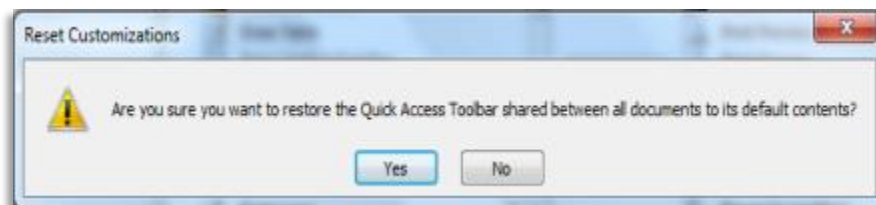
Now, let's accomplish the following:

- ✓ **In Excel, add some of your favorite buttons to your Quick Access Toolbar and rearrange the buttons for your needs.**
- ✓ **In Outlook, add some of your favorite buttons to your Quick Access Toolbar and rearrange the buttons.**

The Quick Access Toolbar in Excel

1. **With Excel open at a blank workbook, Click the Quick Access Toolbar's Option arrow and add the buttons from the shortcut menu as displayed here.**

2. **After adding the buttons from the shortcut menu, Click the arrow again and at the Customize Quick Access Toolbar click the More Commands... option.**
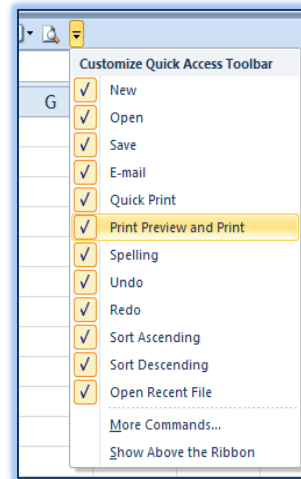
As we accomplished in Word, add your favorite Excel buttons using the Popular Commands item in the Choose commands from: box. Here are some of my favorite commands to add to and rearrange on my Quick Access Toolbar using the Popular commands item:

- ✓ **Custom Sort**
- ✓ **Insert Sheet Rows**
- ✓ **Insert Sheet Columns**
- ✓ **Set Print Area**
- ✓ **Freeze Panes**
- ✓ **Page Setup**
- ✓ **Paste Special**
- ✓ **Speak Cells**
- ✓ **Add your popular commands and rearrange them on the Quick Access toolbar by selecting a command and using the Up and Down arrows to move your buttons.**

3. **Next change your Choose commands from box to All Commands as circled above. Press the letter A and scroll to AutoFilter. Add AutoFilter to your Quick Access Toolbar this command button doesn't appear on the**
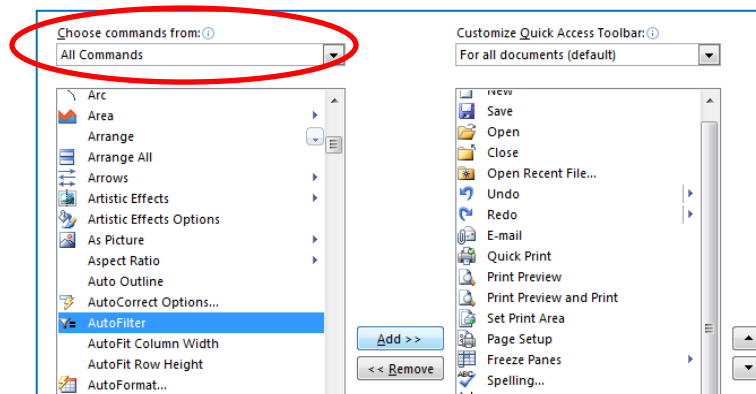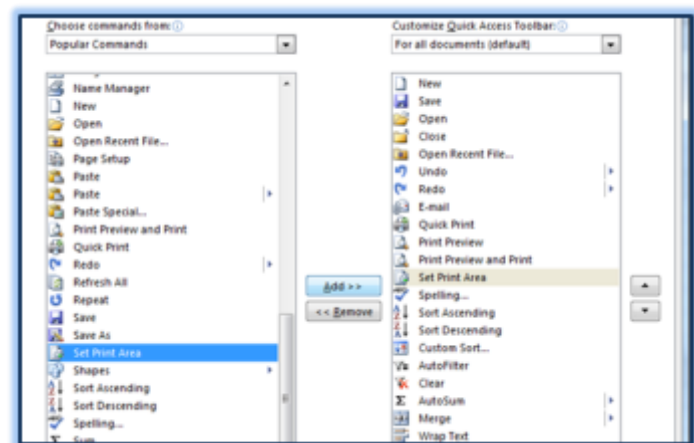
Ribbon and is very helpful. This one button accomplished two tasks – first it will filter for whatever you have selected and it will turn on your filtering for you. I also add the Clear Filter button. Notice ALL of the Commands in Excel and add your buttons as you wish. Click OK.

4. Next, decide if you want to show the Quick Access Toolbar above or below the Ribbon.

Now, you are ready to work with productivity in Excel 2010. Let's customize our Outlook's Quick Access Toolbar, now.

The Quick Access Toolbar in Outlook

1. With Outlook open, Click the Quick Access Toolbar's Option arrow and add the buttons from the shortcut menu as displayed here.

2. After adding the buttons from the shortcut menu, Click the arrow again and at the Customize Quick Access Toolbar click the More Commands… option.
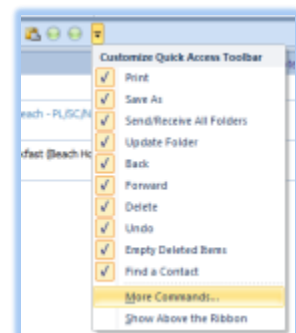
As we accomplished in Word and Excel, add your favorite Outlook buttons using the Popular Commands item in the Choose commands from: box and then use the All Commands item in the Choose commands from box. Here are some of my favorite commands to add to and rearrange on my Outlook Quick Access Toolbar:

✓ **Outlook Today**
✓ **Categories**
✓ **My Computer**
✓ **My Documents**
✓ **Copy**
✓ **Paste**
✓ **Speak**
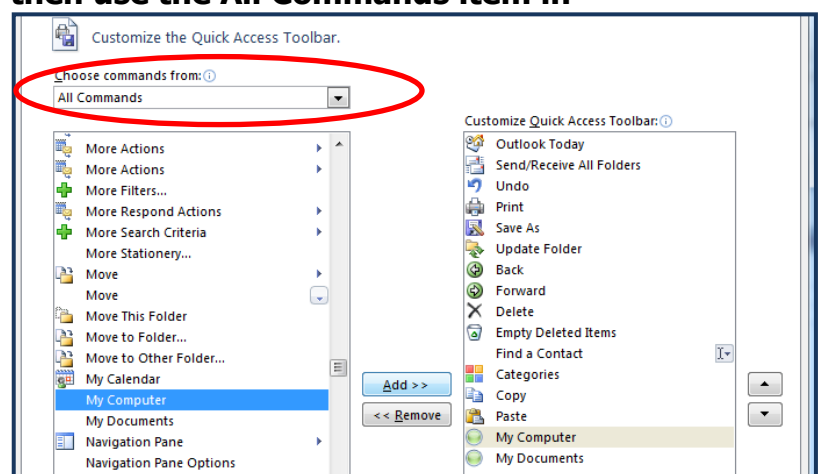
Click Ok.

Now, that we have customized our Quick Access Toolbar it is time for us to customize our Ribbon with our own Tab – A Terrific New Feature in Office 2010.

Customizing the Ribbon – Your Own Tab and Groups

One of the disadvantages of Office 2007was the inability to customize the ribbon and add your favorite and popular command buttons to your own tab as you could create toolbars and add your icons in Office 2003 and its predecessors. With Office 2010 you can create your own tab and groups then add your favorite command buttons. We'll build our own tab with often used command buttons, now. We'll start in Word and then accomplish tabs in Excel and Outlook.

1. **In Word 2010, Right Click on a tab or anywhere in your ribbon and from the short cut menu chose Customize the Ribbon (You may click the File Tab and go to Options for Customize the Ribbon, too).**

2. **Notice at the Top Right Pane you may choose difference Tabs to view, such as Main Tabs, All Tabs, Tool Tabs – we'll work with the Main Tabs. The main tabs are checked and listed below the Customize the Ribbon box – I have checked**
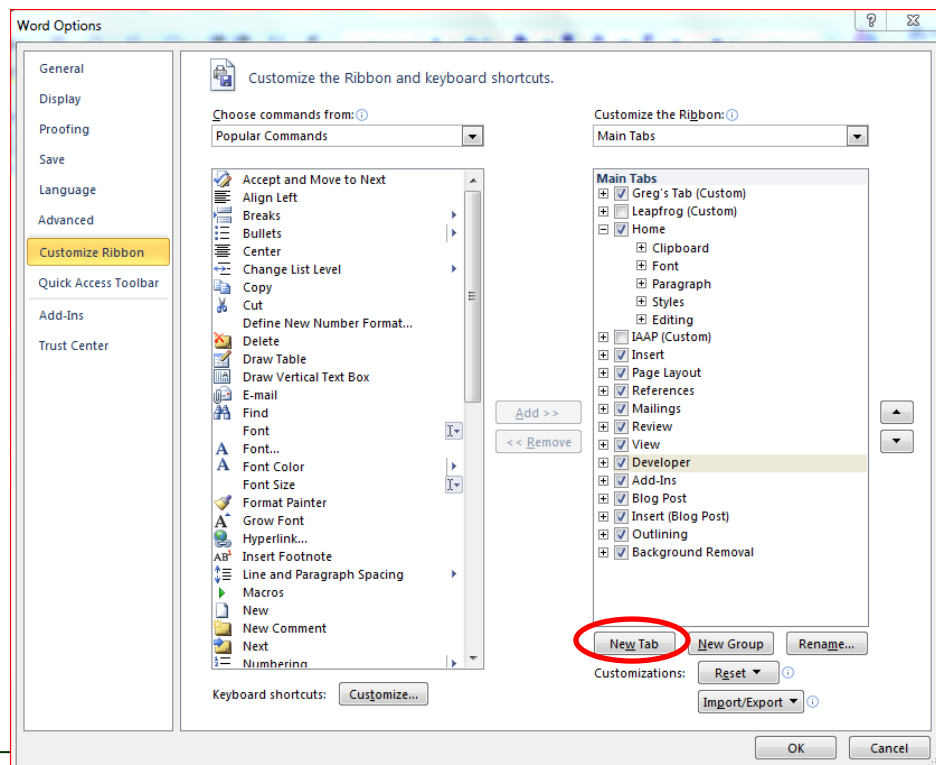
Developer in order to perform Macros and Create Word Forms.

3. **Click the New Tab button, Word creates a New Tab and New Group for you.**

4. **Next, select your New Tab and click the Rename button at the bottom of the pane. The Rename box appears for you to enter the name of your Tab – I am naming my tab "Greg's Tab". After changing the name, click OK.**

5. **Next select your New/Custom Group and click the Rename button at the bottom of the pane. The Rename pane displays change the Display name to Format as displayed at right. Click OK after changing your name.**

6. **You can rename and change the picture/icon of many of your command buttons, too.**
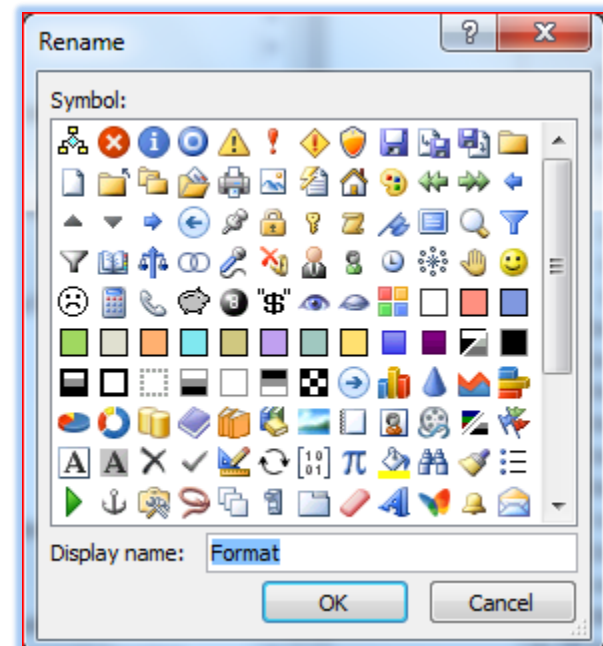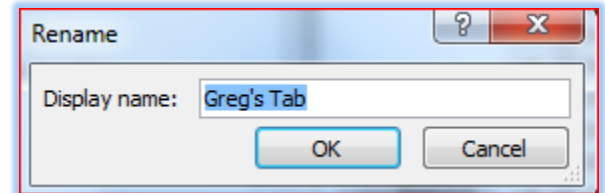
Next we add buttons from the Popular Commands pane to our tab. As displayed at right, I am clicking and dragging my Format Painter from the Popular Commands pane and placing it under my Format (Custom) Group.
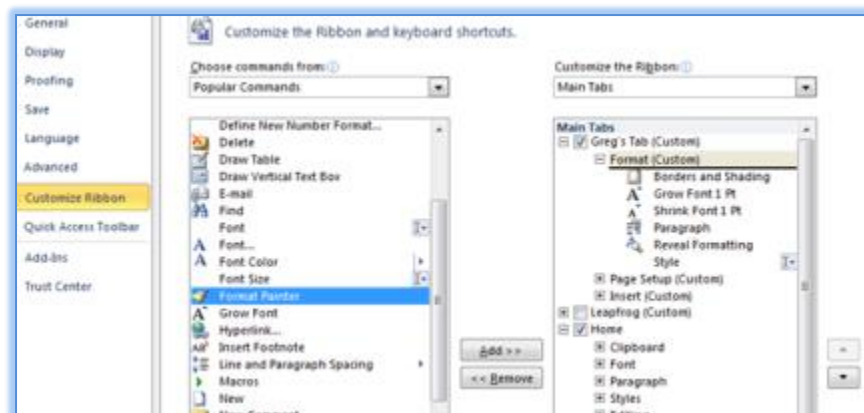
You may add buttons several ways:

1. With the command button you wish highlighted or selected click the Add button and the selected button adds underneath your selection in the right pane,

2. Click and drag the command button from the left part of your pane to the right part of your pane and the Group.

☛ **Hot Tip! Shortcut menu and moving the Tabs. You may right click on a Tab or Command Button in the Customize Ribbon Pane and from the shortcut menu perform many of the same options to avoid clicking buttons at the bottom or right of the pane. Also, you may rearrang your Tabs by selecing the Tab and clicking and dragging the tab to its new location, you may use your shortcut menu as display at right or using the arrow buttons to move the selected Tab, Group or button up and down. I have put my Tab (Greg's Tab) first so that when I open an application this is the first tab that is available for me – you may want to keep your Home tab as the opening Tab.**

If you right click on a Tab you may show or hide that Tab using the Show Tab item and checking/unchecking it. You may remove a tab from this shortcut men, too. ☛

☹ **An Important Gotcha! You can't modify the buttons on the Quick Access Toolbar as you can using the Ribbon and your Tabs for your Command Buttons.** ☹
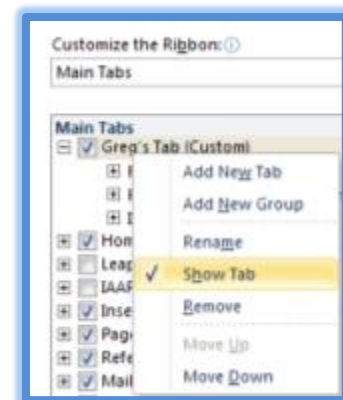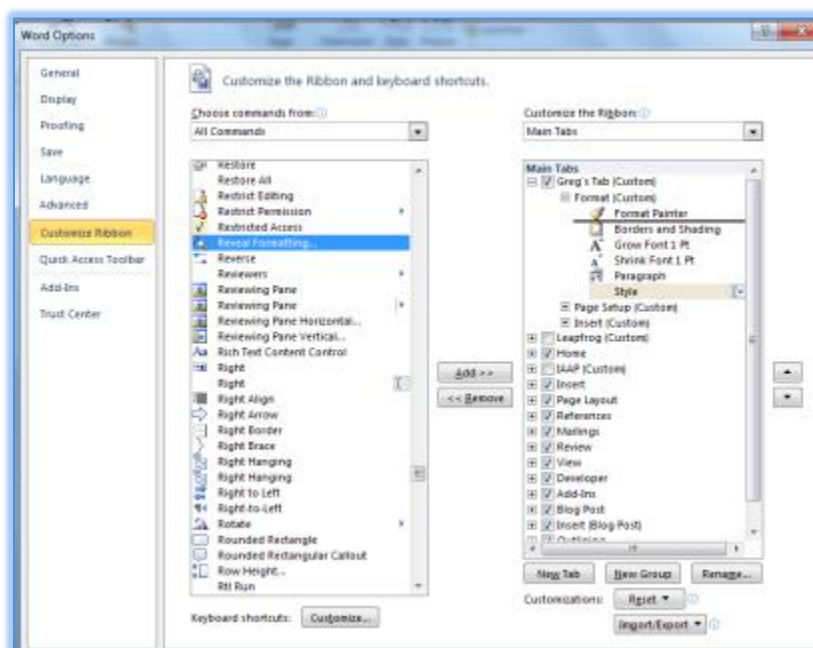
Adding more buttons in Word.

My custom tab, *Greg's Tab*, appears below with my Groups and Command buttons. This is a good example of how you will want to create your own tab and add your favorite buttons. With the *Quick Access Toolbar* and *Your Own tab in the Ribbon* using the Office Suite has never been easier and more productive.
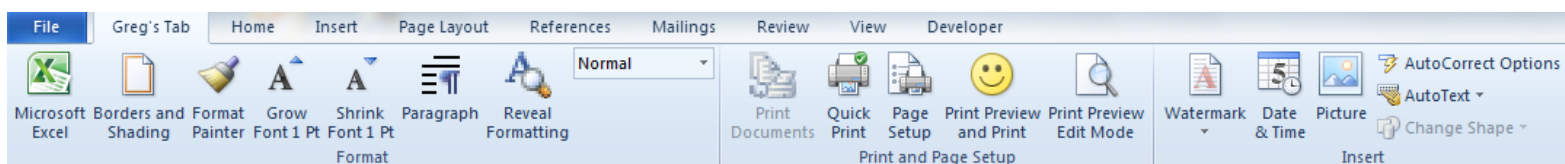
1. **Activate your Customize Ribbon pane in your Word Options by right clicking on a Tab on the Ribbon and Clicking Customize the Ribbon from the shortcut menu.**

2. **Change your Choose commands rom box to All Commands. Word alphabetically shows ALL of the available commands. I am adding the Reveal Formatting button to my Format Group on my Tab by clicking and dragging the button from the left part of my screen to the right part of the pane illustrating my Tab and Groups.**

3. **Similar to the Quick Access Toolbar I add my AutoCorrect Options, Grow Font by 1 pt and Shrink Font by 1 pt as well as other favorite formatting and page setup commands. You should add the buttons and groups as you use Word and have your favorite commands in one place.**

✍ **Modifying Buttons. We changed the Name of a Group and Tab, but you may also change the picture of a button. You may change the Name of your button and the picture the command represents. When I added the** *Print Preview Button* **and the** *Print and Print Preview Button* **(two different commands but the same picture), I couldn't determine a difference without the Screen Tip. So, using my Customize Ribbon Pane I selected the Print and Print Preview button and clicked the Rename button (circled at right). Using the Rename pane displayed here I chose the Smiley Face for my picture or symbol and I changed the Display name: to All in One Printing. Clicking OK changed my command buttons Name and Symbol in my pane and on my Tab.** ✍
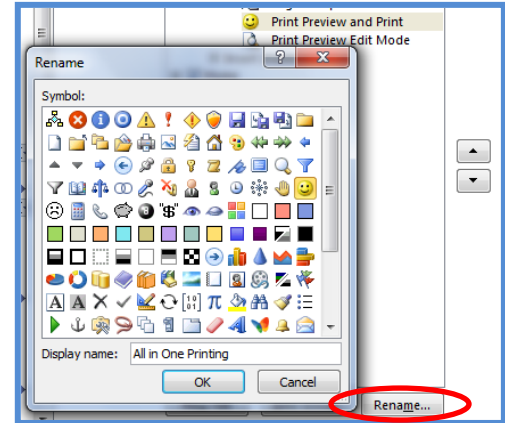
Select some of your buttons and change their name and symbol by using the Customize the Ribbon Pane.

C u s t o m   T a b   a n d   G r o u p s   i n   E x c e l

The process of creating and customizing your tab and groups in Excel is the same as in Word. We will create a tab and a group and add some of our favorite Excel buttons to it.

1. **Activate your Customize Ribbon pane in your Excel Options by right clicking on a Tab on the Ribbon and Clicking Customize the Ribbon from the shortcut menu as displayed here with my Custom Tab named Greg's Tab.**
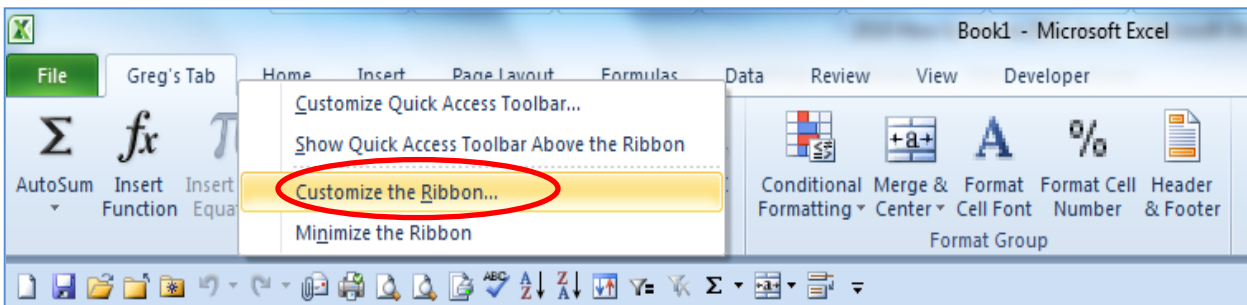
2. **Create a New Tab by Clicking the New Tab button at the bottom of the Customize the Ribbon pane and then rename the tab – I am naming my tab - Greg's Tab.**

3. **Next create a New Group and rename the group. I am creating another group displayed here named Format. I created a Data Group earlier.**

4. **Create and rename other groups if you wish.**

5. **Change your Choose commands rom box to All Commands. Excel alphabetically shows ALL of the available commands. I am adding the Conditional Formatting button to my Format Group on my Tab by clicking and dragging the button from the left part of my screen to the right part of the pane illustrating my Tab and Groups.**

6. **Similar to the Quick Access Toolbar I add my AutoFilter, Clear Filter, Sort, Custom Sort, and other important and often used Excel Commands. You should add the buttons and groups as you use Excel and have your favorite commands in one place.**

7. **After customizing your tab, groups, and command buttons, Click OK. You have your own, productive Tab in Excel.**
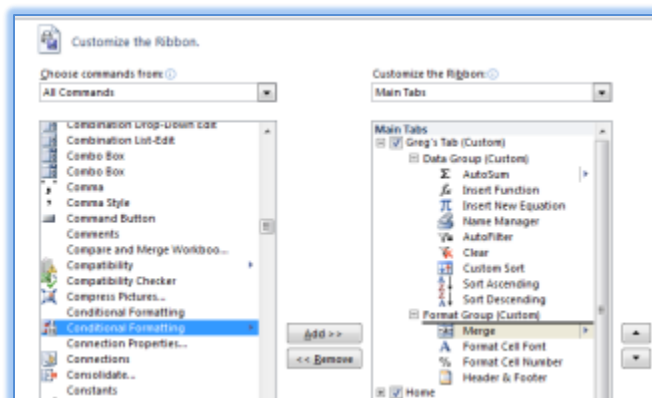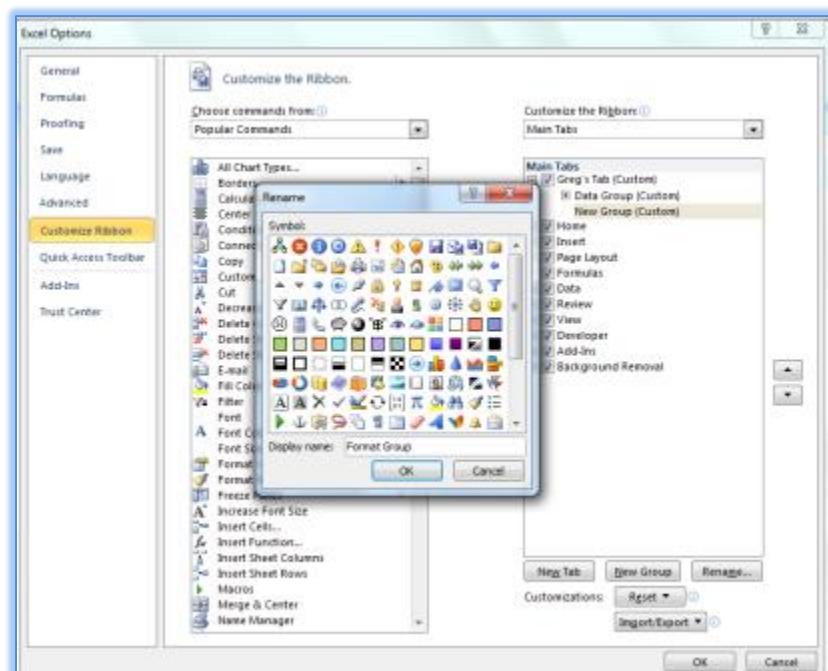
Outlook's Custom Tab

The process of creating and customizing your tab and groups in Outlook is the same as in Word and Excel only the type of commands that we want differ. We will create a tab and a group and add some of our favorite Outlook buttons to it.

1. **Activate your Customize Ribbon pane in your Outlook Options by right clicking on a Tab on the Ribbon and Clicking Customize the Ribbon from the shortcut menu as displayed here with my Custom Tab named Greg's Outlook.**
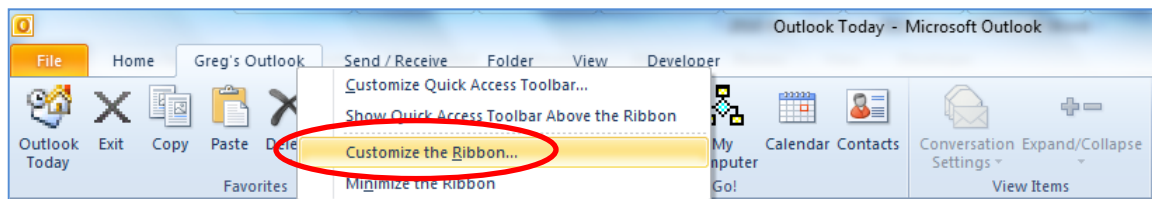
2. **Create a New Tab by Clicking the New Tab button at the bottom of the Customize the Ribbon pane and then rename the tab – I am naming my tab - Greg's Outlook.**

3. **Next create a New Group and rename the group. I have created a Favorites, Let's Go, and View Items groups.**

4. **Create and rename other groups if you wish.**

5. **Change your Choose commands rom box to All Commands. Outlook alphabetically shows ALL of the available commands. I am adding the Categories button to my Favorites Group on my Tab by clicking and dragging the button**

from the left part of my screen to the right part of the pane illustrating my Tab and Groups. I am placing the button under Exit and above Copy.
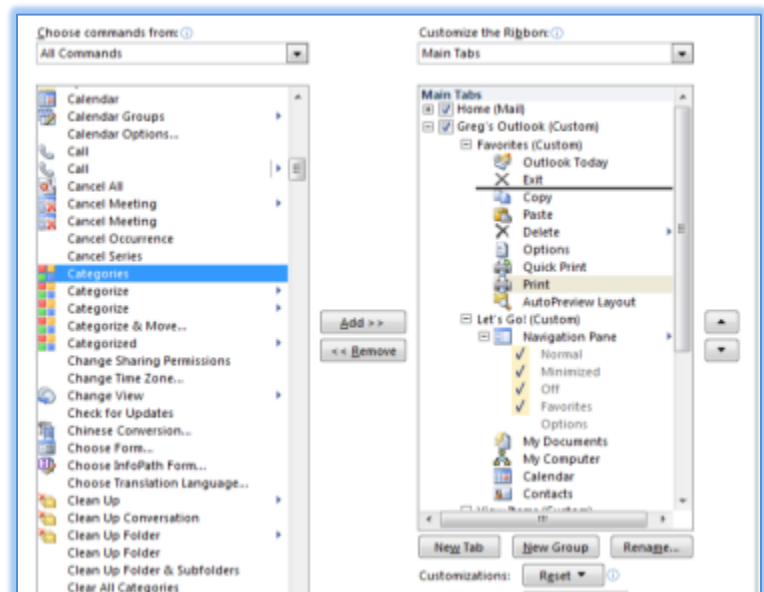
6. **Similar to the Quick Access Toolbar I add my Outlook Today, Copy, Paste, My Documents, My Computer, and other important and often used Outlook Commands. You should add the buttons and groups as you use Outlook and have your favorite commands in one place.**

7. **Also, I like changing my buttons especially for My Computer and My Documents. After adding the button, I select the button and then click the Rename button. While I can change the name of the button through the Display name box, I can change the picture or icon for the command, too. I am using the first button (the robot) for and I'm changing the button name to Greg's Computer. Click OK.**

8. **After customizing your tab, groups, and command buttons, Click OK. You have your own, productive Tab in Outlook to use in all of the objects and items in Outlook.**

☹ **An Important Gotcha! In Outlook, your custom tab will not display in some of the items, such as New Message, New Appointment, etc. and your Quick Access Toolbar changes, too. ☹**

The Return of File!

There were many improvements in *Microsoft's Office* with the release of Office 2007; however, using the *Microsoft Office Button, pictured at right,* instead of good, ol' *File* was not one of the improvements and therefore disappears (YEAH!) with Office 2010. A *File Tab returns bigger and better than ever*.

1. **With a Word Document open, Click the File tab and click the Info item.**
2. **My Information pane appears here with the ability to set permissions, share, and to use**
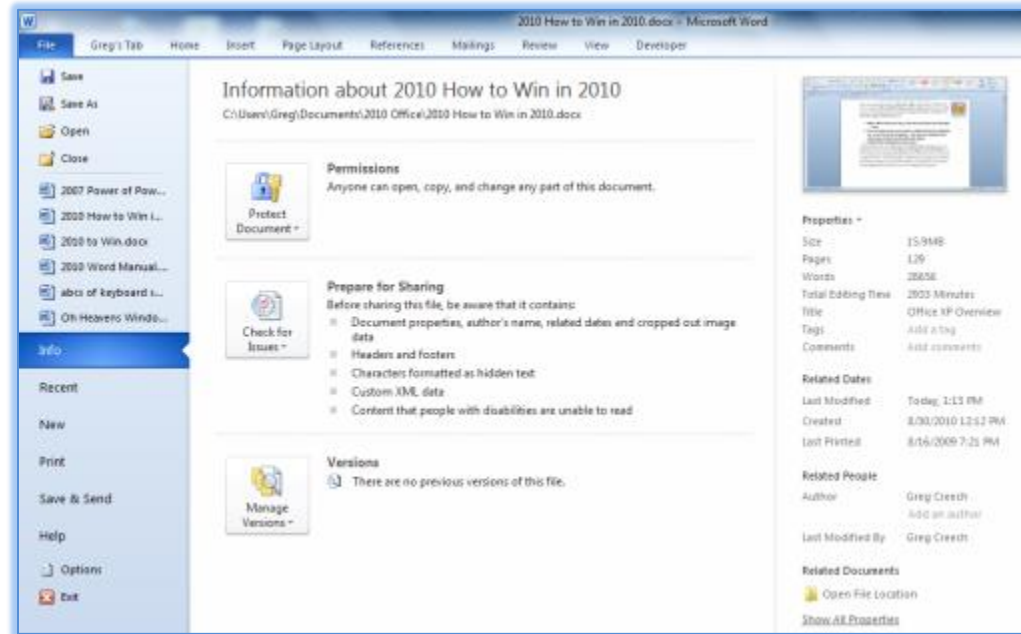
important document properties. Notice that the left part of the pane contains our favorite commands of Save, Save As, Open, Close, and the Recently opened documents appear.

Here are some of the items we will learn in using the expanded, more powerful, and simpler *File tab*.

- ✓ **Common Commands and Simple Recent list,**
- ✓ **Recent – Pinning and unpinning,**
- ✓ **Print – One Stop Shopping,**
- ✓ **Save & Send – Saving in popular (PDF) and email at one place,**
- ✓ **Options – Setting Important Options throughout the Suite.**

Common Commands and Recent List

When you click the *File Tab*, Word should open at the *Info Pane*. The *Info*, *Recent*,

New, *Print*, and other items all contain the *Save, Save As, Open, and Close items* as well as *Your Recent documents list section*. My *Info Pane* and *File tab* appear here. This pane is organized in three sections: *Your Common Tasks and Commands* in the right section, *Important features* and commands in the center, and then *Properties* to the left. The *Common Tasks and Features* are consistent in the Suite, except for Outlook which we will look at Outlook's File Tab later. You may set the number of documents in the Recent Pane at the bottom.
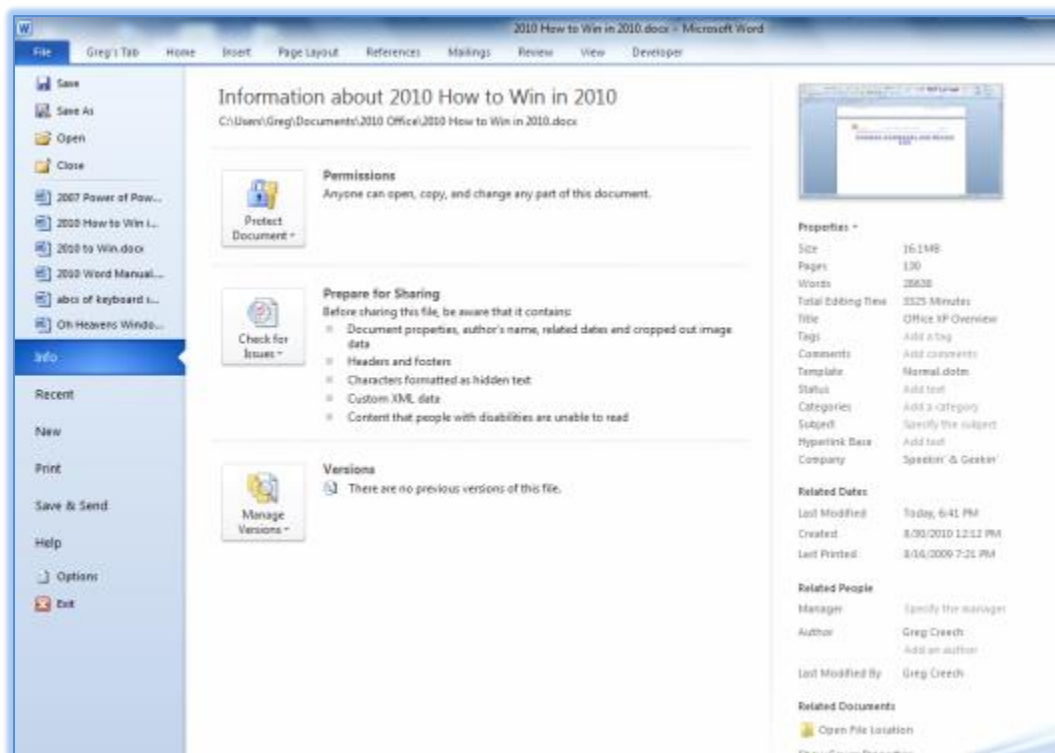
1. **Click the Recent item on your File Tab and at the bottom of the pane change the number of items (I am changing mine to 10) in the** *Quickly access this number of Recent Documents*. **The limit is 50. I use my Recent pane and pinned documents (we will learn this next) for items where I need a listing of more than 10.**
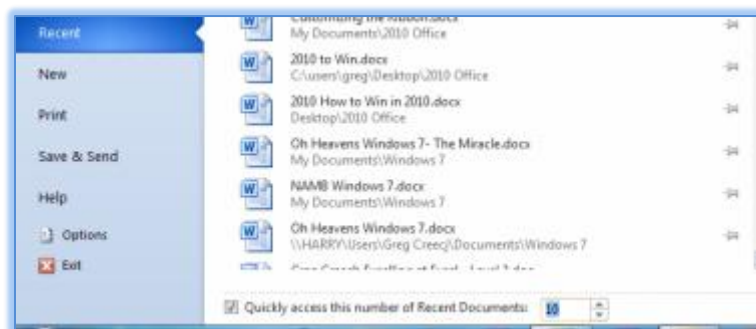
2. **Notice and use your Save, Save As, Open, and Close as you use the products and chance the number of Recent Documents.**

Outlook's File Tab

With some many different types of objects and items in Outlook, the *File Tab* in Outlook

is different and will change based on the type of object and item in which you are working in Outlook. My *Info Pane* appears here; this pane contains the *Add Account* and *Account Information item* for you to view your *Account Settings* and edit/change them from the subsequent menus. Outlook's *File Tab* doesn't contain the *Recent pane* nor

the *Save*, *Save As*, and other commands found in Word, Excel, PowerPoint, Publisher, and Access.
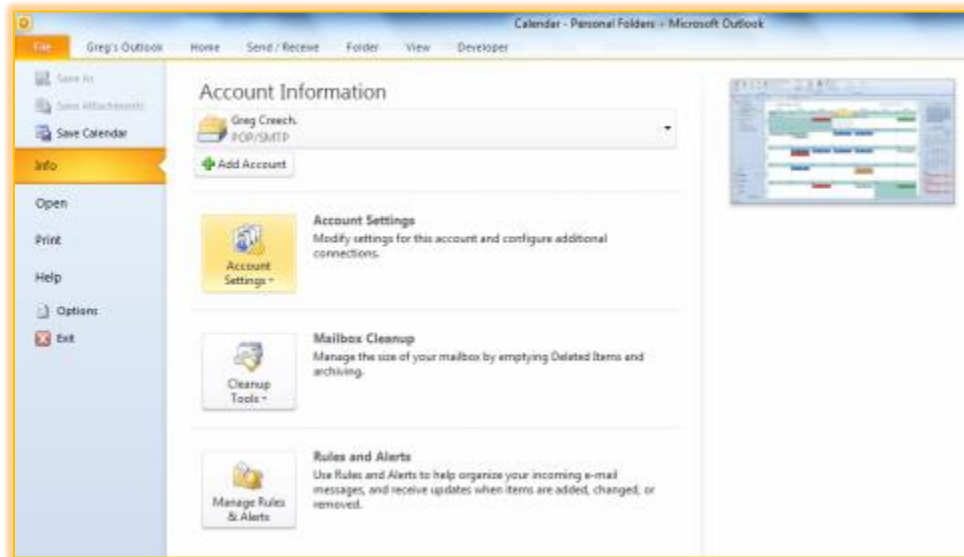
Recent (and Important) Pane

The ***Recent Pane*** displays your ***pinned*** and ***unpinned*** documents as well as ***the Recent Places area***. This saves much time in locating files and working with documents consistently and regularly. By Default your list sorts alphabetically and the pinned documents area grows with the number of documents you want pinned. You can change the default of 17 recent documents up to 50 in your ***Advanced Word Option settings***, which we will accomplish in a future section. Also, you may change your ***Recent documents*** number that appears in your common tasks (left area) of your screen below the Close command – not documents that appear in the Recent Documents/Workbooks panes as displayed above and below.
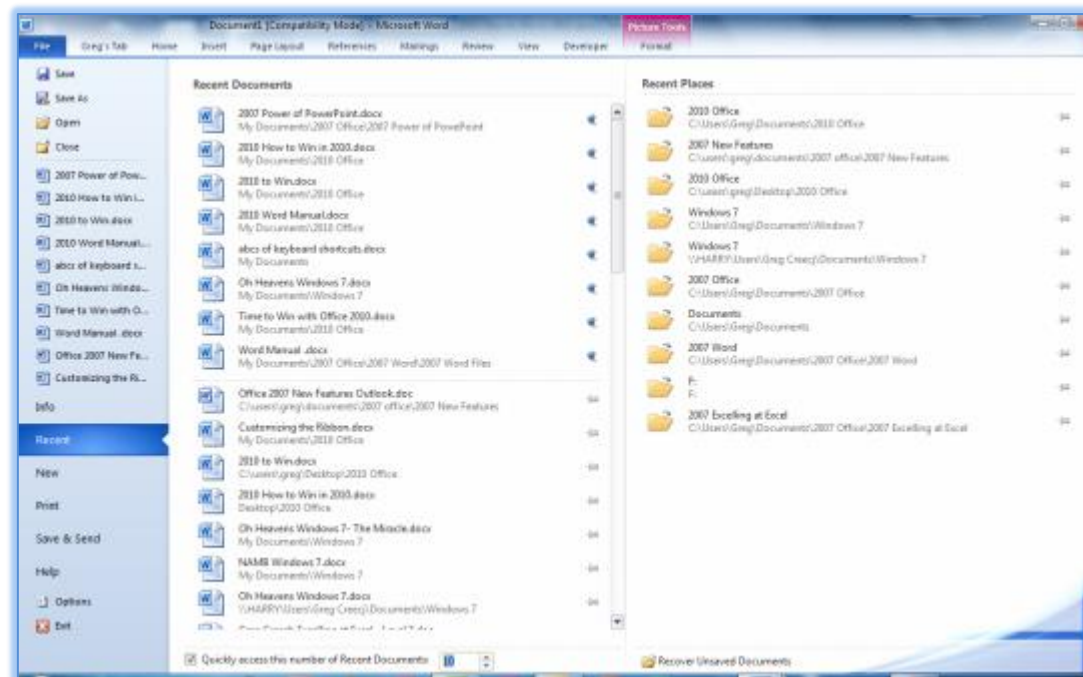
☛ **A Hot Tip! Pinning document, workbooks, presentations, etc. Across the Office Suite, except Outlook, helps you quickly open your favorite and often-used files. You pin your favorite files by clicking the push pin button at the right of the document or the recent place. This pins the file at the top of the pane. You may unpin and remove from the list by right clicking on the file and the shortcut menu as displayed below appears for you to perform popular options, including Opening, Pinning/Unpinning, and Removing from List. You should pinyou're your Recent Files and Recent Places as you begin opening and using your files in Office 2010. ☛**
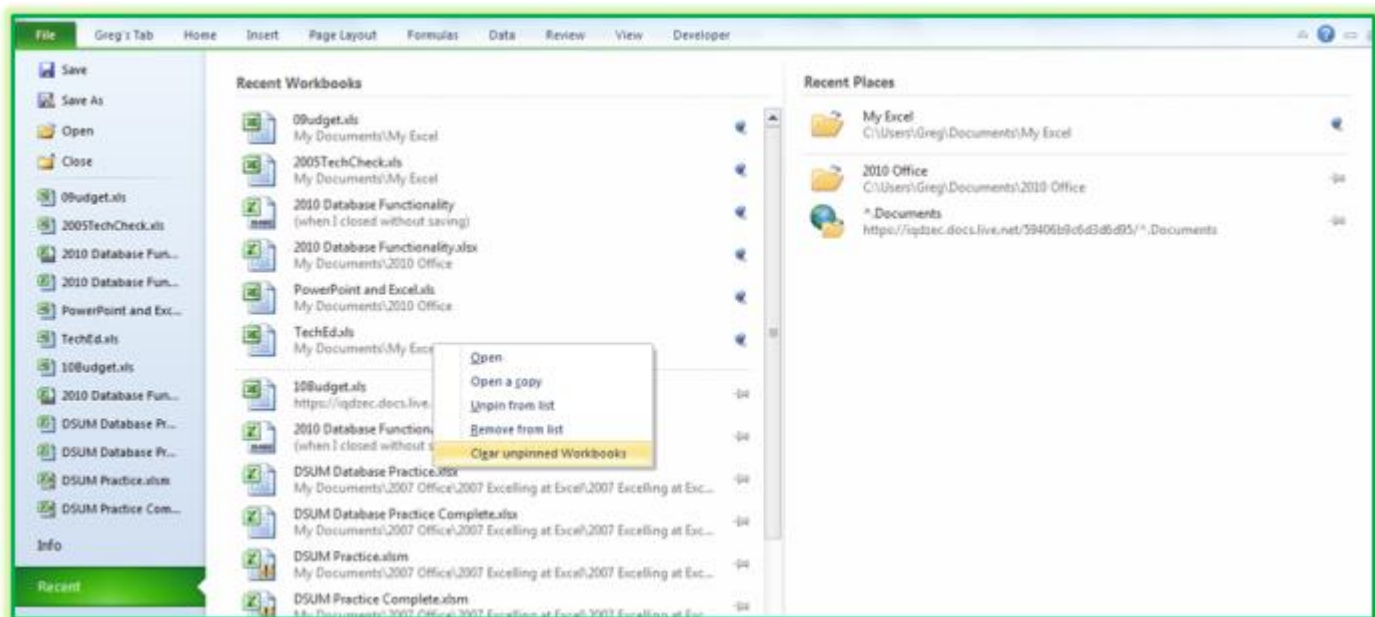
Print! One Stop Shopping (At Last)

Finally, one pane that contains your favorite *Print* AND *Page set-up* AND *Print Preview* in one place. We have had to bounce between *Page Set-up*, *Print Preview*, and *Print* for years to set our settings and customize our print jobs for our Office files. Now, Your *File Tab's Print pane* allows you to select your printer, collate, change the orientation, margins, and use *Print Preview* with a *Zoom slider* and easy navigation through your
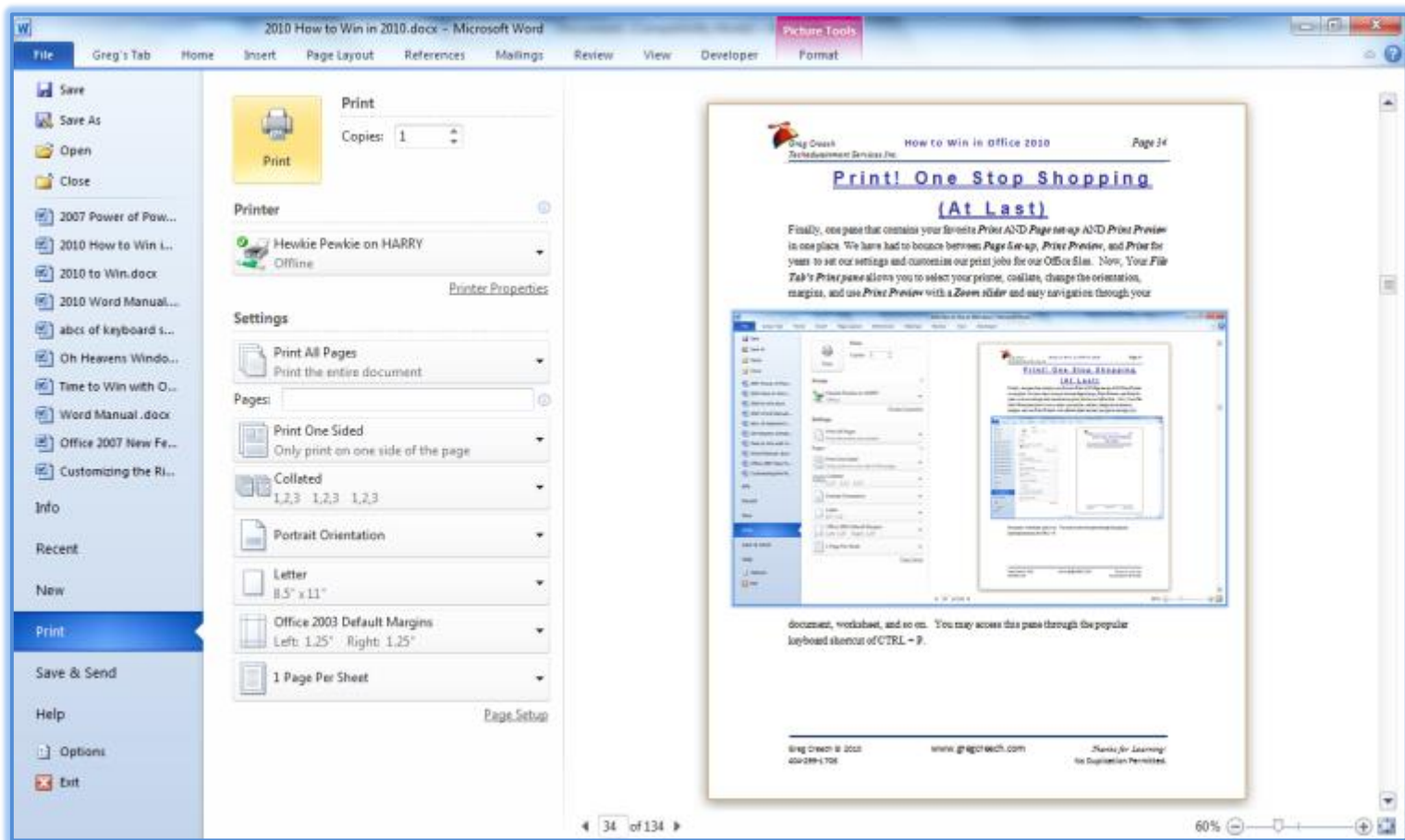
document, worksheet, and so on. You may access this pane through the popular keyboard shortcut of *CTRL + P*. In using Office 2010, I have found this new *Printing Pane* very helpful and more productive than before.

Also, Print Preview is still around and you may use the "traditional" Print Preview but this offers much of the same functionality; however, like Page Set-up you may need to use Print Preview for other items not featured in this Print pane.

In Excel, you may set your scaling, margins, worksheet printing in one convenient location now using the *File Tab.* My Excel Printing and some of my important Page Setup Options appear at right.
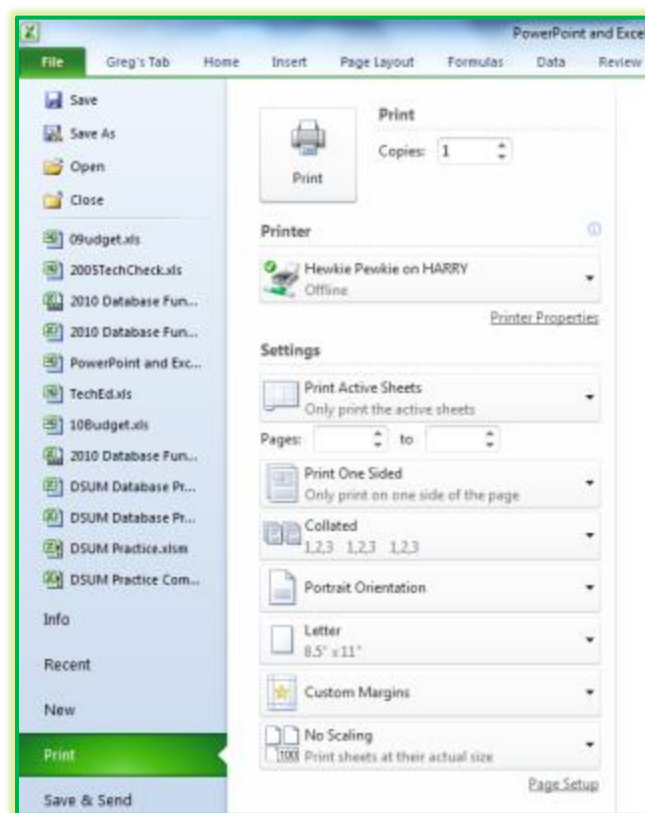
Save & Send

With a Word document or Excel workbook open, click the *File Tab* and trace to the *Save & Send* item and the menu below displays (I'm using Word, but the options are similar across the Office Suite.). This is a very helpful tab to quickly Save the Office document in a *PDF* format and email at one step You can publish your Office file to the web, *SharePoint*, *blogs* and other services.
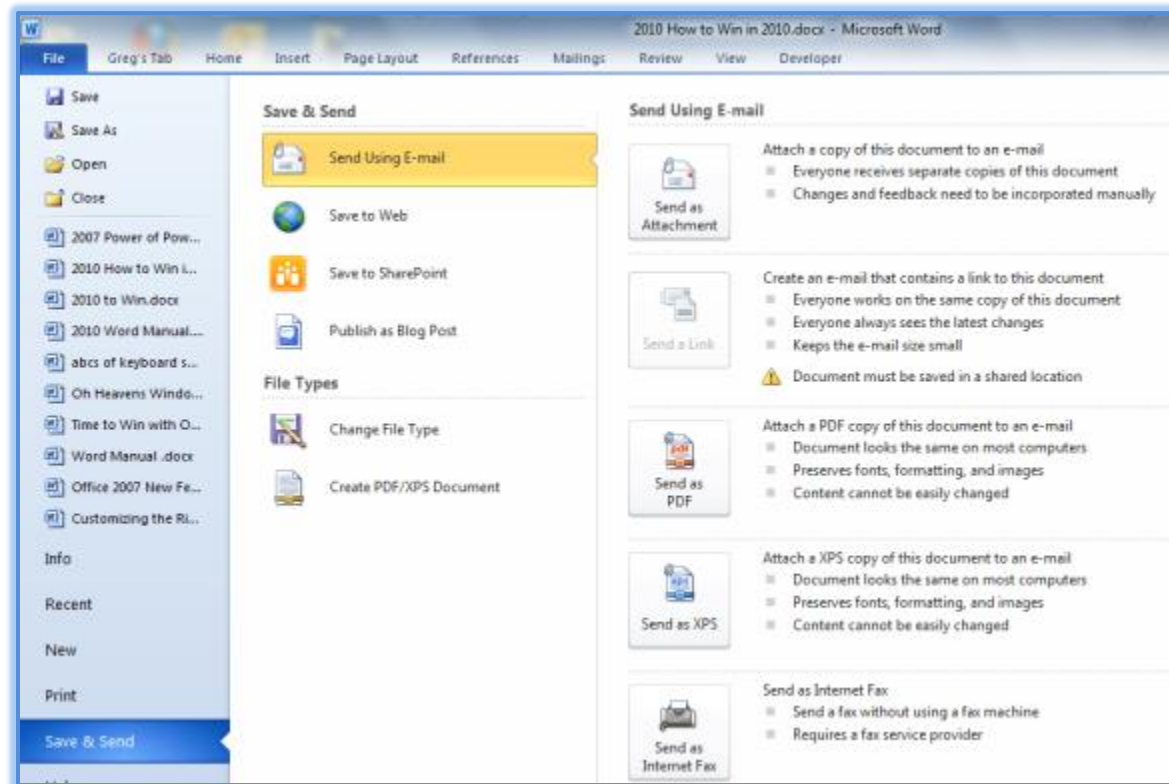
New (And Improved)

With a blank Word document or blank Excel workbook open, click the *File Tab* and

trace to the *New* item and the menu below displays (I'm using Word, but the Blank options, location of templates and creating templates/file are similar across the Office Suite.). You may save all of your documents, workbooks, and other Office files as templates to use repeatedly to create separate files and not affect the templates' contents. The

file extension for a template in Word is .dotx and Excel Templates are .xltx.
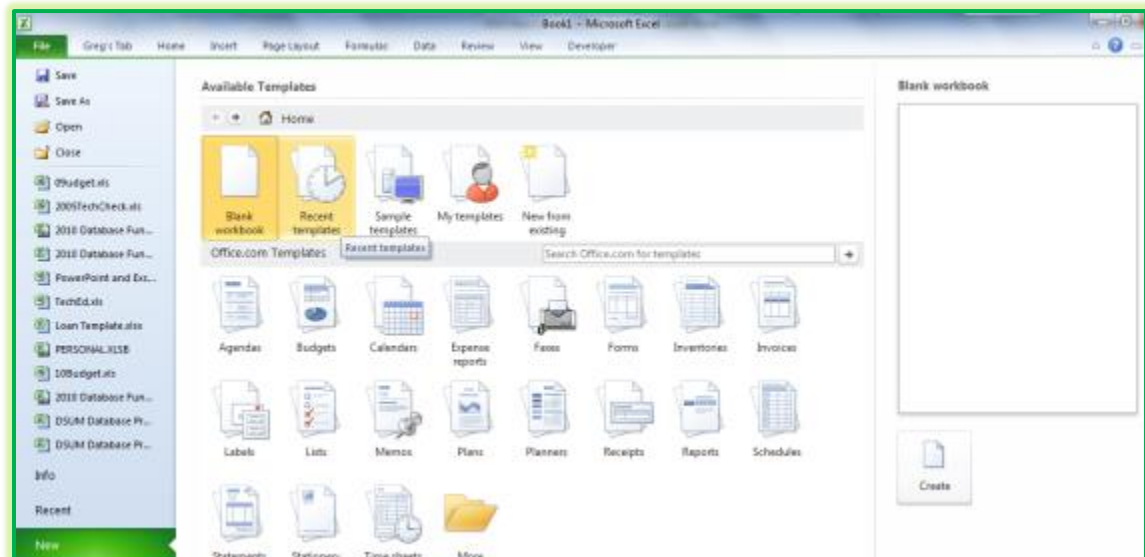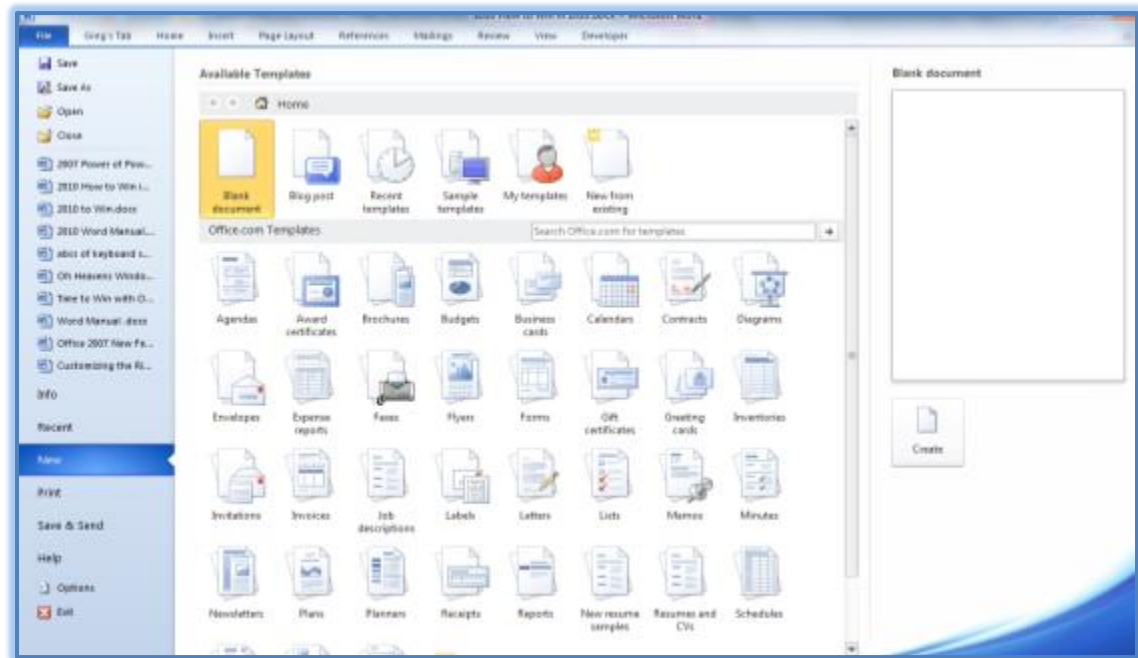
Help

The ***Help item*** in the ***File tab*** provide means to get updates, diagnose your application,

contact
Microsoft,
and to
register and
activate your
products.
This is a
quick and
easy to use
resource and
it is centrally
located here
for you. In
Office 2007,
this was the

Resources tab using the ***Microsoft Office button's*** menu. We will work with ***Options***
next that appears in this screen and is located on our ***File tab*** menu as ***Options***.

Options for your New Office

The *File Tab* contains the important *Options* that you should set for each of your Applications as you begin using Office 2010 and make changes as you need later. The *Options* item is located at the bottom of your *File Tab's menu* below *Help* and above *Exit* as displayed here. This is consistent throughout the *Microsoft's Office Suite* of applications.
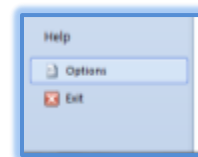
Popular Options

1. **With Word Open and at a blank document, Click the File Tab,**
2. **Next, click the Word Options button.**
3. **The Word Options screen appears at the Popular selection. I have included the Excel Popular screen displayed below, too.**
4. **You should set your Name, Initials, and Screen Tips options if needed, here.**
5. **You may disable or enable the Mini Toolbar on selection; you may always retrieve the Mini Toolbar by right-clicking in the workspace of an application. I don't know why in the world you would ever want to disable live Preview which shows you your formatting changes without actually making the changes until you click an item.**
6. **In Excel you have the ability to set the number of worksheets in a new workbook and to change your font size and other options for you to set according to your needs and use of the application. I have set my font, Font size (which being over 50 years of age goes up every year, now!), Default view, and I include at least 5**
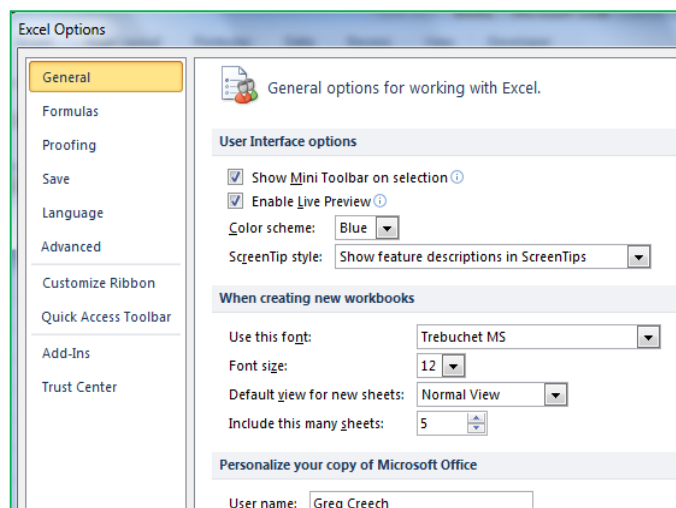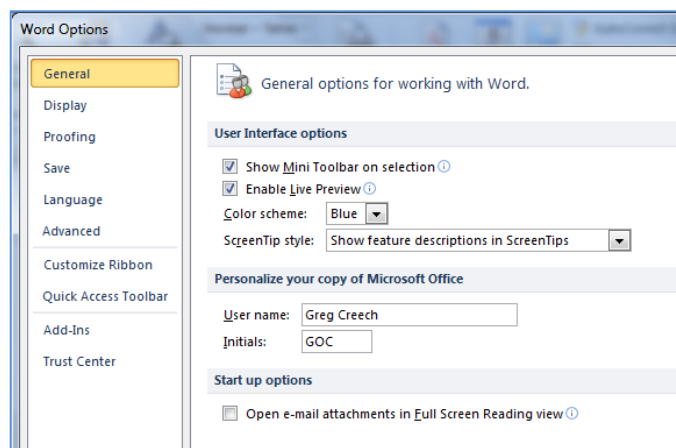
worksheets in a new workbook. We will examine the Mini
Toolbar on selection and Enable Live Preview. Please keep these
options checked until you decide whether you like them or they
annoy you in using the applications.

**Now, we will look at the other screens in your Options, so if you are in
Word – Click the Proofing button.**

The Proof is in the Proofing Tab

Another important tab for you to review is the
Proofing tab. This contains important self-
correcting features of the applications. This contains
the *AutoCorrect Options*. . . button in the new
Office.

Word has more options in the *Proofing* screen than
Excel or PowerPoint and in Word you should check
the *Show readability statistics*. The *Show
Readability statistics* displays a dialogue box to
containing important information about your
document such as what grade level you are
composing, the number of passive sentences and
other neat information about your document. The
dialogue box will appear after you check your
Spelling and Grammar by using the *F7 key* or the
command button in the *Review Tab.* You should set
how you want Word to check your spelling and/or your Grammar and Styles. The
Settings button and associated menu pane allows you to set what and how you want
Word to check your spelling and grammar, such as using Contractions, Passive
Sentences, Wordiness and so on.
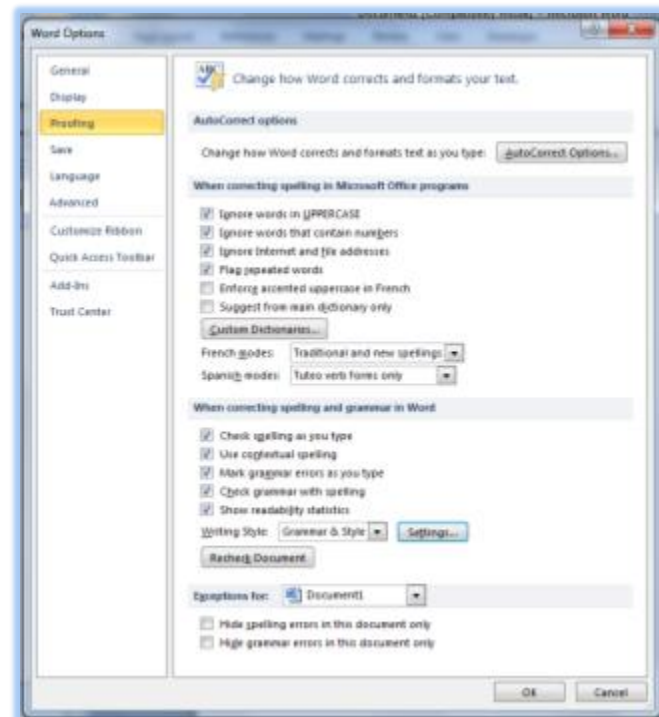
Save Options - Save Early and Save Often

The **Save options** are consistent across the applications and allow you to change the type of file you are storing and where your default locations of your files are. The Word 2010 Save Options screen appears at right; the **Save Options** screens are very similar across the applications.
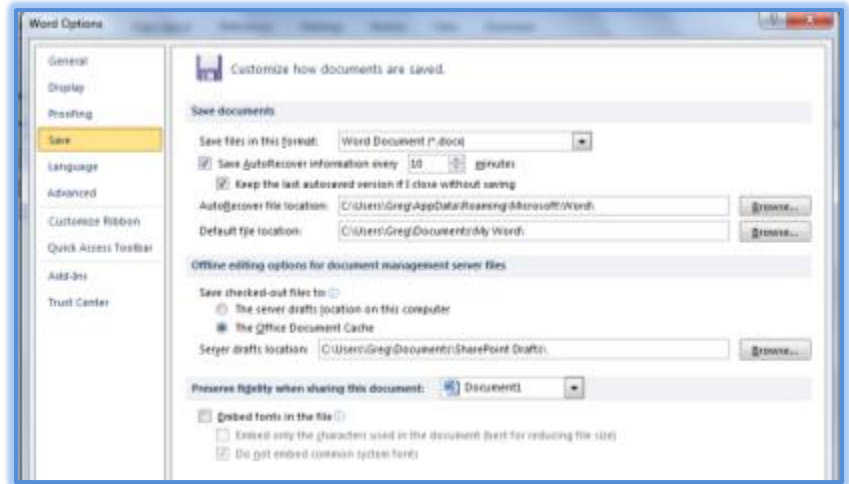
The Easy to Use Advanced Options

The *Advanced Options* screens are essential to review in each of the applications and

contain time saving customizations for you and how you like to use the applications. Please don't think of *Advanced* as difficult; I think this should be renamed to *Important Options*. There are options for Cut, Copy, and Paste, Printing, and many more. Here are some of the options I like to change or to check in using Word:

✓ *Inserting Pictures as a Tight Format and decide my defaults for copy and paste,*

✓ *Changing my Recently Used Document list to 50 in the Display section,*

✓ *Entering my Mailing Address at the end of the pane for Word to use as my return address for envelopes, labels, letters, etc.*

After setting your Important Options click OK.

Excel, Outlook, and PowerPoint have no shortage of *Options* in the *Advanced* areas and you should review those applications for how you want your *Office* application to work for you.
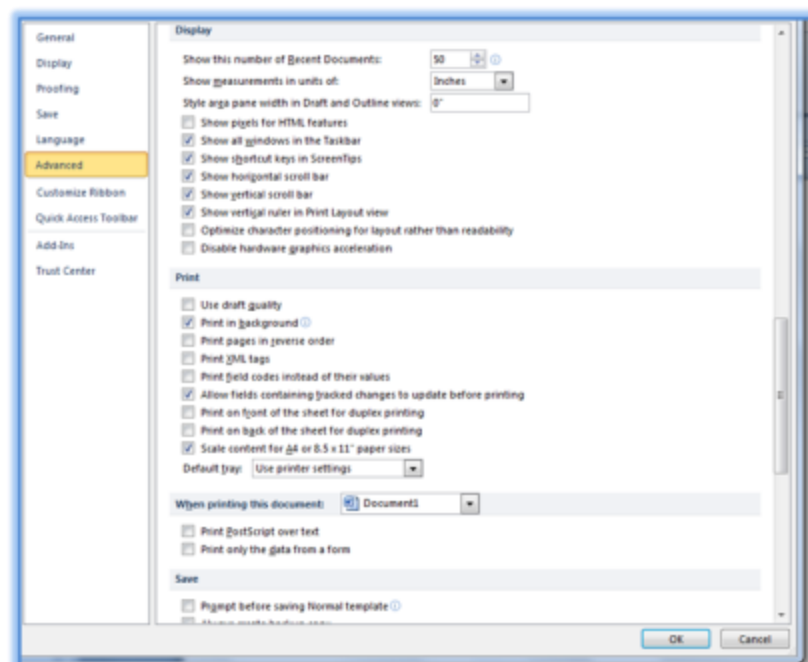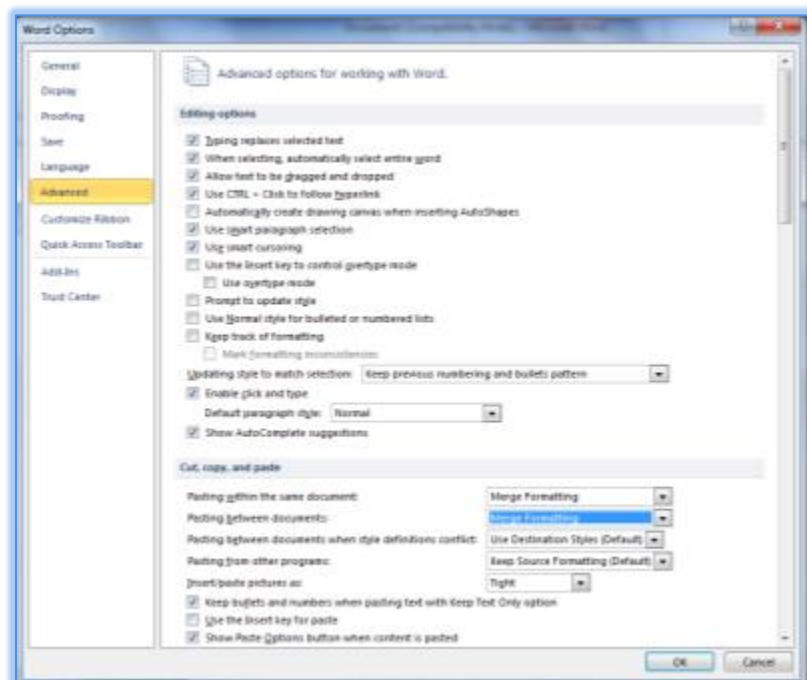
Other Options

There are other *Options*, such as *Add Ins, Display, Formulas*, for each of the applications. You should review those as well. My goal is to provide an overview and let you know of important options that you should set as you first start using *Office 2010* and to be aware of where your items have moved from the good, old *Tools* and *Options* in previous versions of Office. We have used the *Customize Ribbon button* and menus as well as our *Quick Access Toolbar panes*. The *Add Ins* install programs and services you can use with your applications if you need additional functionality, such as *Excel's AnalysisPak*. The *Trust Center* will allow you to review your security, permissions, and other settings – please use these items as you need for your application and organization. *Language* has its own space, now, and menu for you to choose your language(s) and settings.
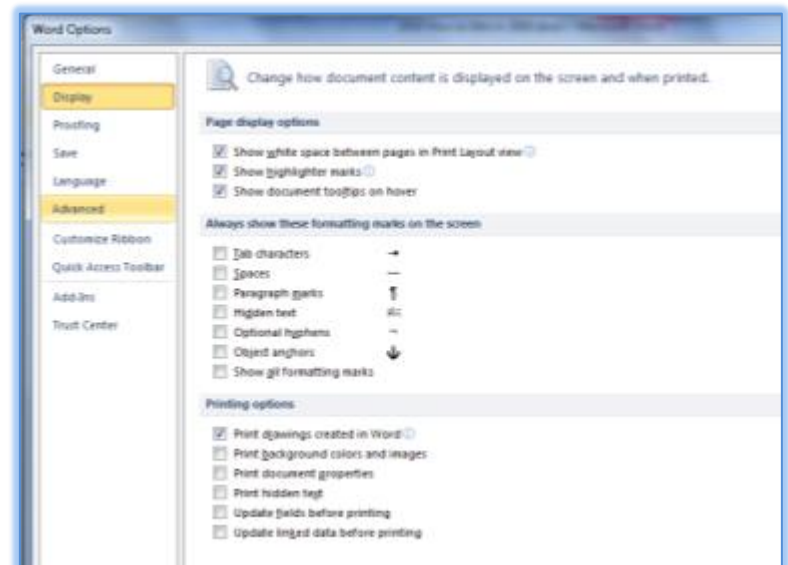
Outlook Options
General Pane

Outlook Options have been disorganized since Outlook Version 1.0 and the previous menus and organization were cumbersome. *Outlook 2010 i*mproves the organization and the interface for accessing many important and fundamental options that affect Outlook overall. In my LookOut! Outlook 2010 course I cover all of these options, so this section can only permit some of the important options that you will want to know and review.

With Outlook 2010 open, click the File Tab and then click the Options item at the bottom of the left pane above Exit.

Your *Outlook Options* pane opens at the *General pane*. This is similar to other Office applications with your *User name, Show Mini Toolbar on selection, and Color scheme.* You should set your preferences here for *Outlook*. I also make sure I make *Outlook* my default program for my E-mail, Contacts, and Calendar.
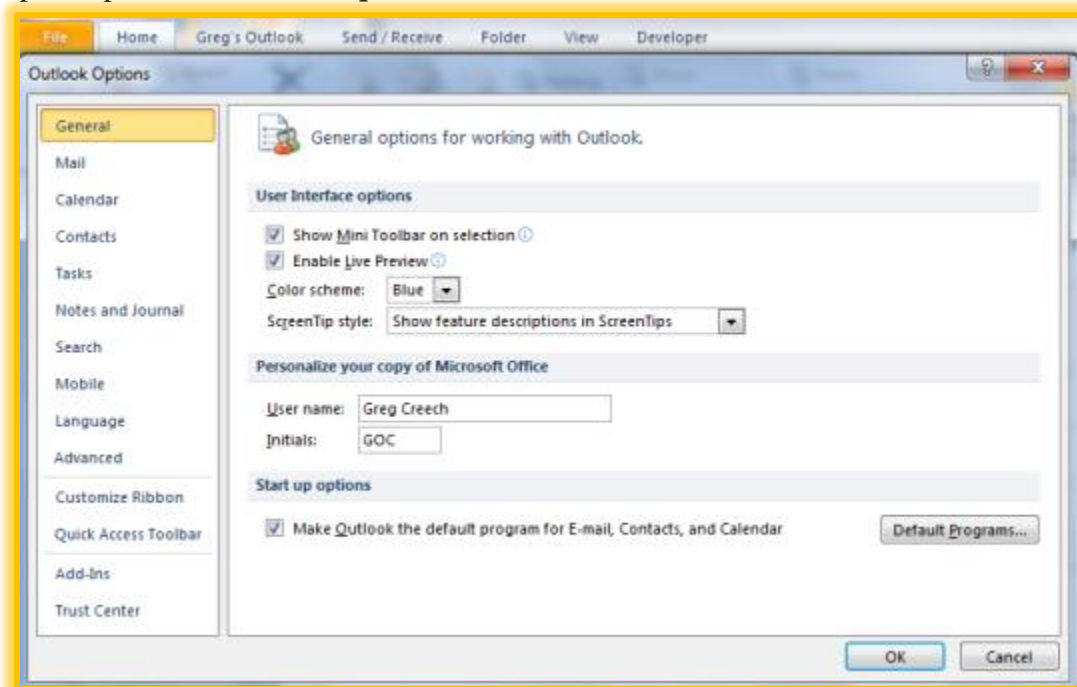
The *Outlook Options* pane has several items that we have studied thus far, such as *Customize Ribbon* and *Quick Access Toolbar*. I will overview some of the important items starting with *Advanced* and *Mail Options*.

Advanced Options

The Advanced options are not advanced at all and contain some of the most important settings that guide your use of Outlook. You will want to review these options and set them as you convert to Microsoft's Outlook 2010.

1. **With your Outlook Options open, Click the Advanced item.**
2. **You should review the Outlook panes and set those options. We will review these in detail in a later section particularly the To-Do Bar. There are other ways of quickly accessing your Navigation,**
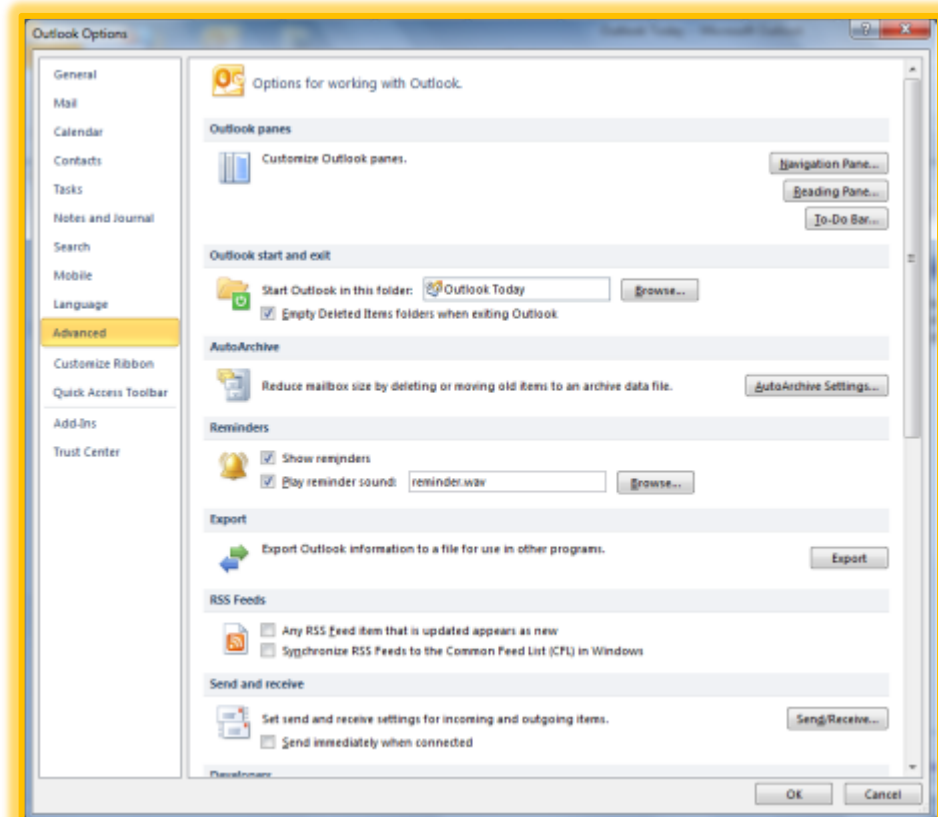
Reading, and To-Do bar options which we will learn later. Pictured here are the Reading Pane Options which I make sure I change the option of moving from one message to another – I accidentally change messages from Read to Unread by moving my cursor. I like using the first option of marking my
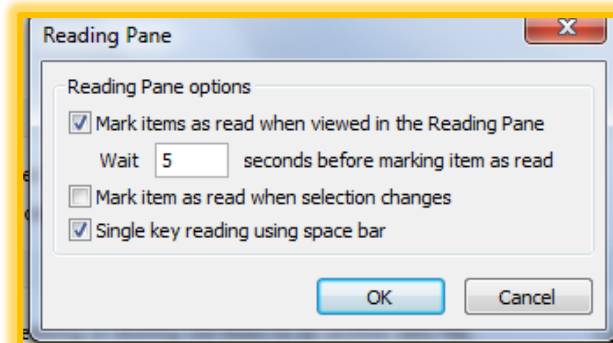
messages as read after a minimum of 5 seconds – that gives me time to preview the message and decide if I need to open it.
3. **Set your options here if you like**

Send Receive

You will want to review and set your Send Receive Options, too. Activating the Send Receive Groups dialogue box by Click the Send/Receive ... button on the Send and received section of your Advanced Options allows you to schedule your Send Receive and perform other important settings for you.
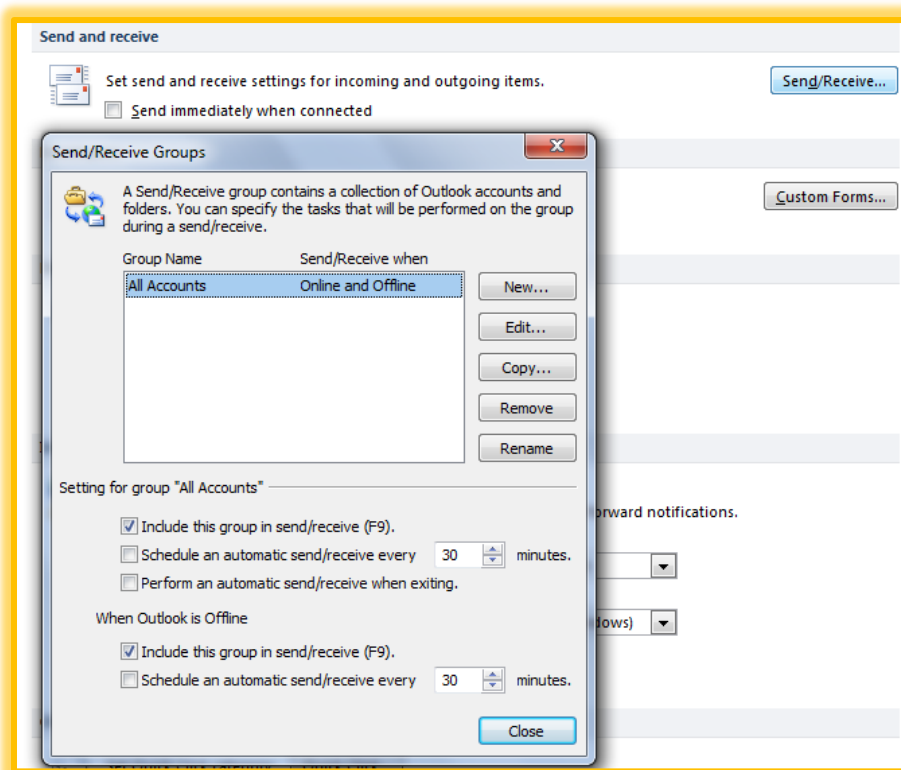
Mail Options

Your *Mail Options* are packed with all sorts of items for review for formatting and managing your email messages and folders. Some of the items that you want to know are:

1. **Signatures – providing information at the bottom of all your email messages,**

2. **Message arrival – setting how you want to know about incoming messages – I have all of my options chosen and I modified my Desktop Alert through the**

   Desktop Alert Settings so my desktop alert remains in view for a longer period of time.

3. **Send messages - This section provides ways of setting your Importance and Security Levels on ALL of your messages, using commas instead of semi-colons to separate your email addresses, and I have unchecked the *Delete meeting requests and***
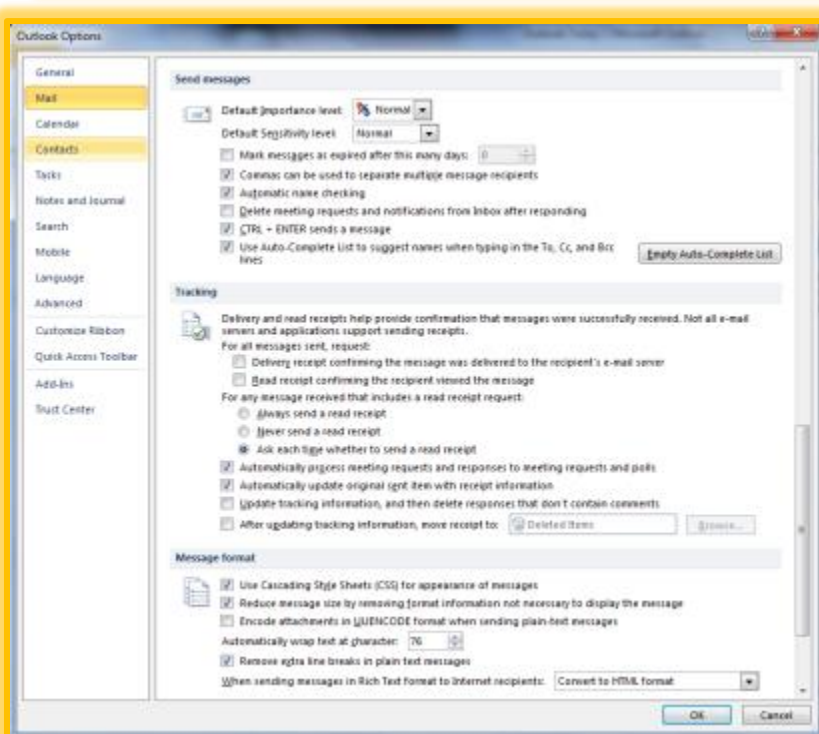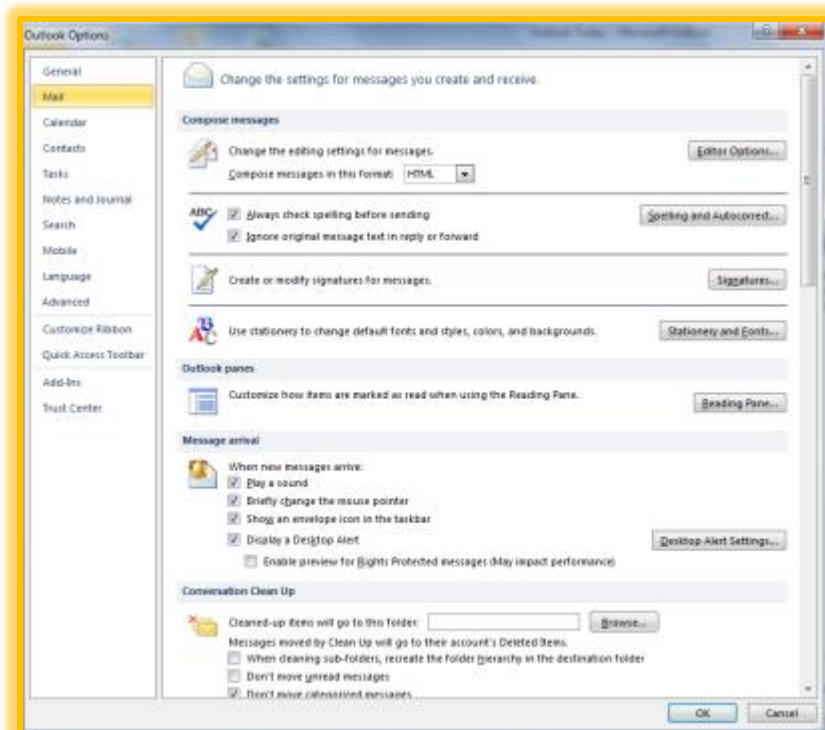
notifications from inbox after responding because I like to keep this message for future reference and assistance. I certainly like using my keyboard short cut of CTRL + Enter to send a message and I have Outlook suggest names in my to, cc and bcc address lines. I haven't needed nor wanted to Delete my Auto Complete List History.

4. <u>Tracking</u> – This allows you set your Delivery and Read Receipts for ALL of your messages; there are options that allow you to only set Delivery and Read receipts for specific messages which is what I use. This section provides ways for you to determine how you respond to read receipts, too.

You should review the other *Outlook Objects'* options, too, to set your *Calendar*, *Contacts*, *Tasks*, and other items in Outlook. I cover these in detail in other Outlook courses.

Productive Ribbon, but Where are the Bows?

Microsoft's Office 2007/2010 *Ribbon* is productive, beautiful, and combines our previous toolbars, menus, and task pane features in a much easier and a more powerful way of working with the applications. As a 25-year veteran of using these products, I got excited when we moved from command menus to icons, now we can have the best of all of the worlds with *The Ribbon,* especially the ability to customize *the Ribbon* in Office 2010 as we accomplished earlier. I think you are going to find the *Ribbon* a bit confusing at first. For me, old habits die hard and I had to accustom my life and work without the Menu bar and Standard/Formatting Toolbar. And the *Live Preview Feature* introduced in Office 2007 that displays your selected text's new format based on hovering your cursor over a style, font, or size "freaked" me out at first. However, once I worked with the new Ribbon and features that pop out of nowhere or are enhanced greatly, such as the new *Mini Toolbar* that appears with your *Shortcut Menu* when you right-click, I find it difficult to use previous versions of Office. The 2007/2010 version of Office is much easier to use and to teach than any other version, especially for our youth and those new to *Microsoft's Office*. Here's two neat ways of increasing your productivity using *the Ribbon.*

*Two important and time saving Hot Tips for you in using the Ribbon and Tabs!*

🖋 **Hot Tip 1: Minimize the Ribbon! Four ways to minimize the Ribbon ─ First, the Ribbon takes up a lot of space on your screen. You may minimize the Ribbon and use it only when you click on a Tab.**

1. Office 2010 has the new Minimize Ribbon arrow at the top of your window next to the Help button. The Minimize the Ribbon button appears at right. With the Ribbon minimized the button becomes the
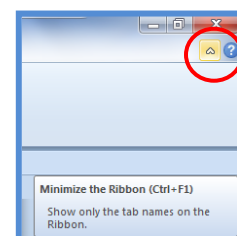
Expand the Ribbon button.

2. To minimize the ribbon double click the _active_ Tab's Name. Double clicking a tab expands/minimizes the ribbon, too.
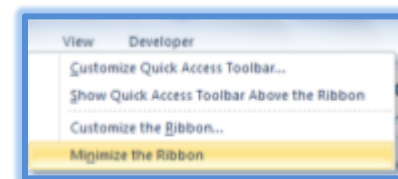
3. Right click on any tab or command button on the Ribbon and from the short cut menu choose Minimize the Ribbon at the bottom of the menu.

4. Keyboard shortcut of CTRL + F1 – when you press your CTRL (Control) and the F1 keys simultaneously on your keyboard the Office application minimizes and expands your Ribbon, too. ☛

Why minimize The Ribbon? The Ribbon takes a lot of space. With the Ribbon minimized you have more room in which to work on your file. With the Ribbon minimized, to use a tab, you click the tab and the Ribbon's tab expands for you to use the Command Buttons. After clicking the button you want and you click back into the body of your document, worksheet, or presentation the Ribbon minimizes again. This is similar to using the old Menu bar. The difference is the Menu bar was vertical and text oriented and the Ribbon is horizontal and more graphically oriented.

☛ Hot Tip 2: Second, if you have a scroll wheel/button on your mouse and the Ribbon is NOT minimized, you may scroll through the different tabs rather than clicking the tab. Moving your cursor to the Ribbon and rolling your scrolling button/wheel up or down changes the tabs for you! You must first click on a tab for this to work; otherwise, the application will scroll through your file – not the Ribbon. ☛

☹ An Important Gotcha! With the Ribbon minimized you cannot scroll through the Tabs as described above. You'll have to maximize the ribbon in order to scroll through your tabs and command items. ☹

Try these two shortcuts, I think you'll like using these two features in Office 2010.

Welcome Home – The Home Tab

The *Home Tab* appears above. The *Ribbon* is composed of *Tabs, Command Buttons* (aka Icons), and *Groups*. As you can see, the *Ribbon* is packed with Command buttons,
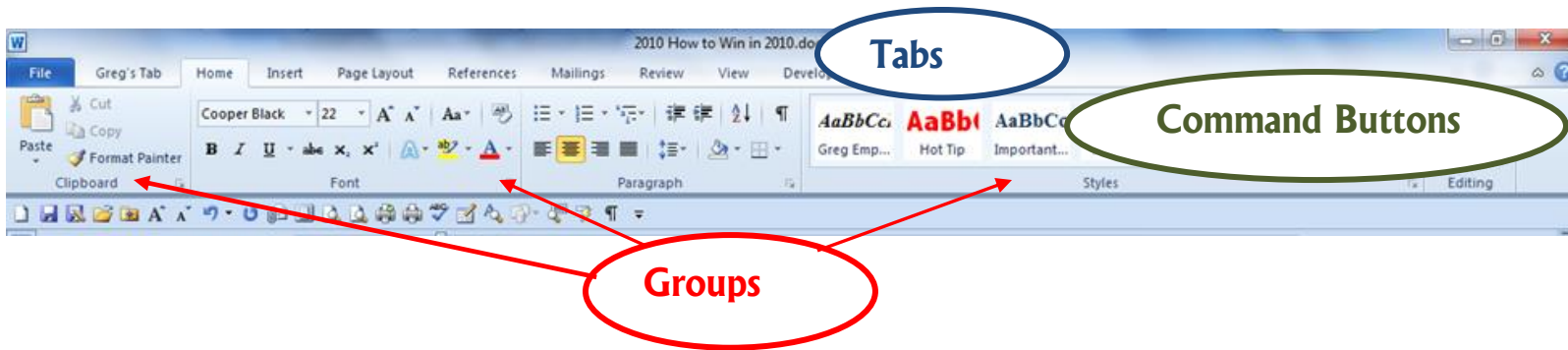
menu items, and are organized in a logical manner. However, getting accustomed to where your previous icons, menu items, and other shortcuts from previous versions of *Office* is a bit challenging. Here's an example of how my old habits in the applications are hard to change, and I bet you will experience the same. The *Views* in Word and PowerPoint have always been at the lower left corner of your screen – now the *Views* in Word and PowerPoint have moved to the left of the screen – a simple rearrangement, but I can't count the number of times I still go to the lower right part of my screen to change a view and then realize OOPS! the views have moved on me.

An Important Note ♪ - Your screen resolutions will affect the number of commands you may see in a group. The lower the resolution your computer is set the fewer commands you may see – the group will display an arrow for you to expand and view the commands. The higher the resolution the more commands you may view in a group without the need to expand the group. For example, with my screen resolution set at 800 x 600 my Editing Group required me to expand the group in order to view and use the commands. With my screen resolution set at 1024 X 768 my editing group displays the Find, Replace, and Select Commands. You may change your resolution settings using the Display Properties and the Settings Tab in Windows XP.

Paste Preview and Paste Options

The number 1 reason people use the Undo button is to undo an improper paste and then must use Paste Special, with which many users were unfamiliar. Now when you Paste you will have Paste Preview in your Shortcut menu. Depending upon what you are copying/cutting to paste, the menu will change. If you are pasting a picture you will have different options, than text. I am using text with the Paste Options pictured at right. As you move your cursor over the different buttons for Paste, Office provides a Live Preview. At right I am displaying, copying and pasting this paragraph into another document and notice that my shortcut menu disappears only leaving the Paste Options for me to view and then to click to choose the correct paste selection.

Here are the options when I'm using the Clipboard to perform my paste and the Options in Excel.
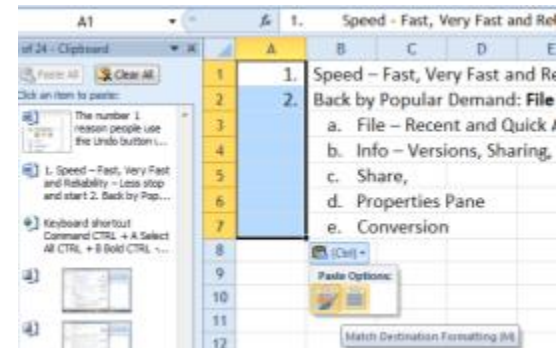
Screenshot Editing

Wow! What an Improvement – as a writer and specifically a technical writer I use a lot of screenshots in my documents. The process required several steps in the past or the use of

a third party vendor to accomplish robust and quick screen shot editing and use. Office 2010 provides Screen Shot and editing built into the applications. With files and programs open, you may use the Insert tab and screen shot. I like using Screen Clipping because whichever file you were previously working you may click Screen Clipping and the previous file opens and dims for

you to click and drag the area that you wish to insert your Screenshot. If you simply click the item in the Available Window menu, the entire screen is inserted into your file. After the insertion then you will need to perform any formatting, such as cropping and resizing.

As an example, I open an Excel workbook with a listing of clients, this file appears first in my list of Available Windows. As displayed above I am choosing Screen Clipping and

since I was in the Excel worksheet last, Office opens my Excel worksheet and dims for me to click and drag to select the area I want to insert into the document as displayed here. After I click and drag the area and then release my

mouse button, this area automatically inserts into my Word document!
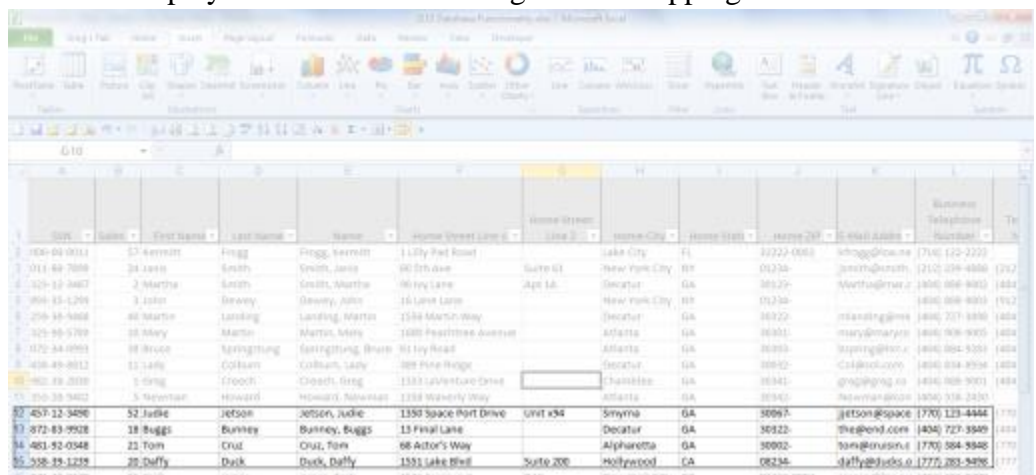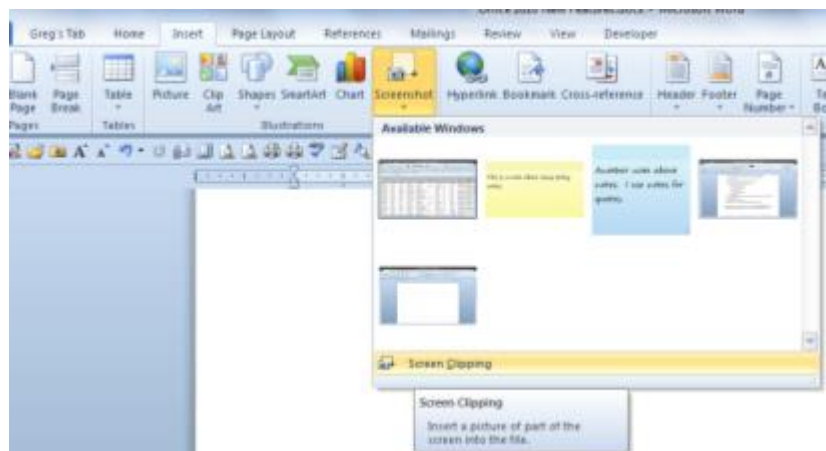
In Outlook, I want to insert a portion of a map for a client that is "directionally challenged" (a man no doubt). After using a map program to locate the address, I open Outlook and a new mail message. I click the Insert Tab and Screenshot. The first item in the Available Windows is the map. When I click screen clipping Outlook minimizes and the mapping web application activates for me to choose the area I want including in the email. After clicking, dragging, and releasing my mouse button, the area inserts into my email message as displayed here. This saves a lot of time, especially for all of the screenshots you see in my manuals and books.

If you have Windows 7 there is a nice Snipping Tool that you may use as well. The Snipping Tool allows you to Snip your Desktop and other items that may not include in the Office screenshot.

☹ **An Important Gotcha! You may not (actually CAN NOT) have your files/applications minimized to view in the Screenshot menu. Your files must be open, active, and not minimized.** ☹
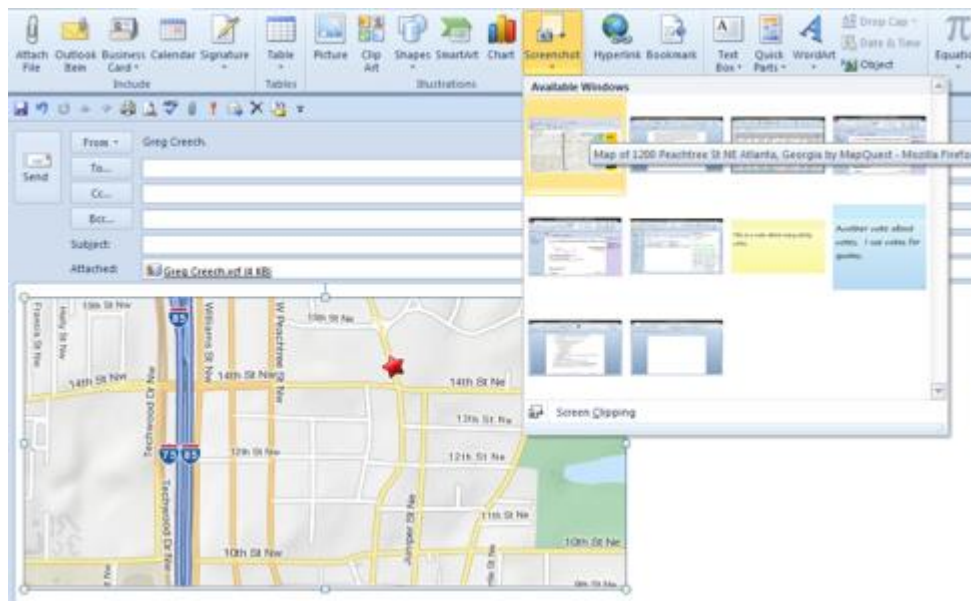
Outlook's People Pane

Outlook has finally moved into the new century. The People Pane is a popular pane for you to use to view ALL email messages, appointments, social network information, attachments, and so on for the for the person who you select.
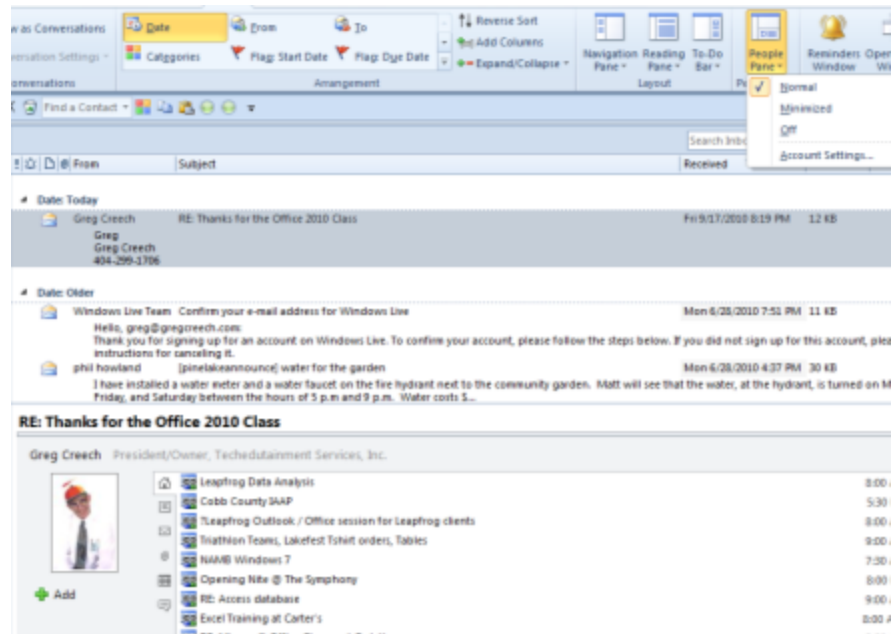
Outlook Quick Steps

This is an user-friendly way of creating shortcuts known as macros.
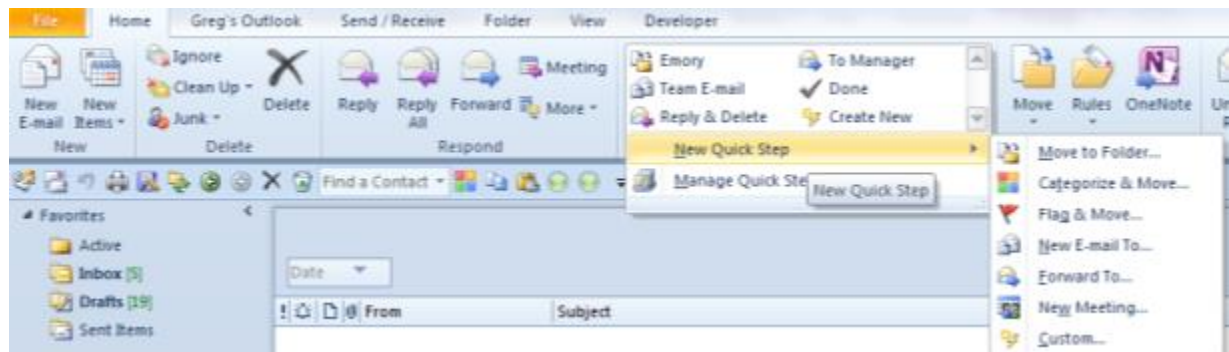
Quick steps allows you to set the actions you take to perform a task, such as moving an email message to a specific folder or assigning items to a category. The task completes with one click rather than several selections and clicks.

Outlook Schedule View and Calendar Grouping

You can create a grouping of calendars for other people, resources, etc. and click a check box to display your individual and group calendars. Outlook expands the view for

Meetings into the Schedule view, so that now you can view multiple calendars in a more comprehensive and helpful view by dates and timeframes (you may change the timeframe in increments such as hourly, 30 minutes).
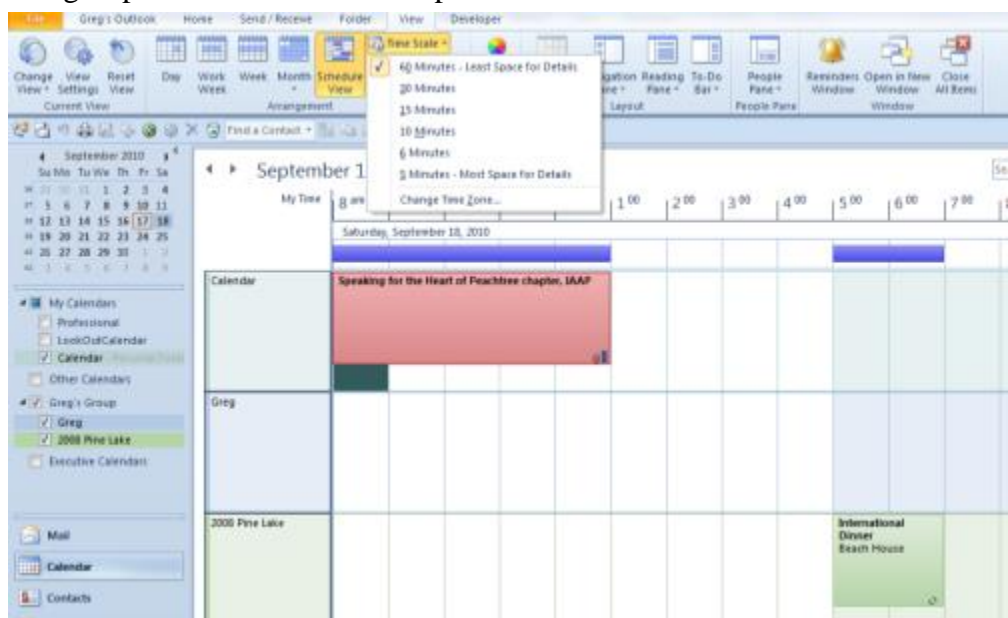
PowerPoint Animation Tab and Animation Painter

Similar to the Format Painter in the Office Suite, PowerPoint 2010 has the Animation

Painter which allows you to select an Animation and apply the Animation to other items and objects. Animation Painter provides a preview of the animation before you click to ensure this is the animation you want to paste.

Select the text or object with Animation you want to replicate and Click the Animation Painter to paste the animation once or double click the Animation Painter to apply the Animation to more than one area or object.
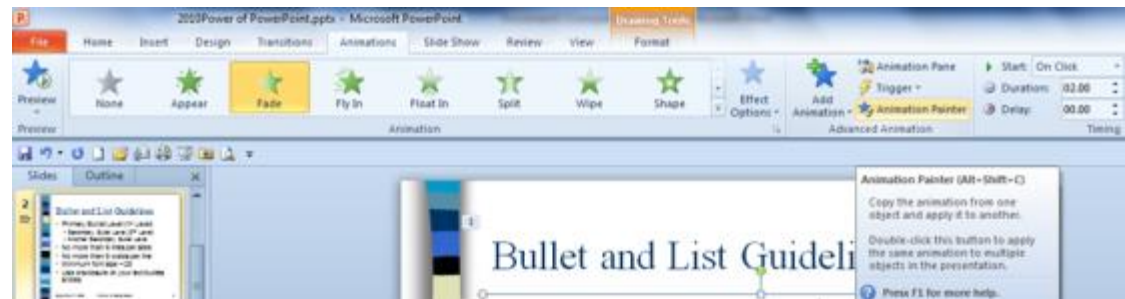
Artistic Effects on Photos

Office 2007 did a great job of upgrading our ability to enhance our pictures with multiple

and neat effects, such as shadows, glows, and unique rotations. Office 2010 adds Artistic Effects to the options available to enhance and alter photographs. I have a photo selected at right and with my Artistic Effects pane active I can view the various effects on through Live Preview to determine which effect I may want to use.

Video Tools – Format and Playback Tabs in PowerPoint

PowerPoint 2010's new Format and Playback Tabs for Video tools allow you to create interesting color, shapes, transitions, and many options for using videos in a presentation.
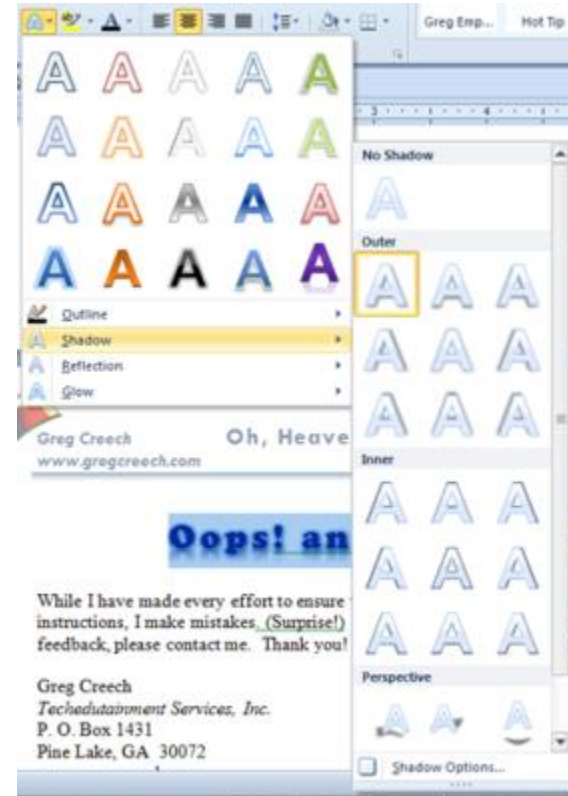
The Format tab allows you to present your video in unusual shapes, colors, and effects as displayed at right. I have changed my color scheme, shape, position, size, added a reflection, and glow.
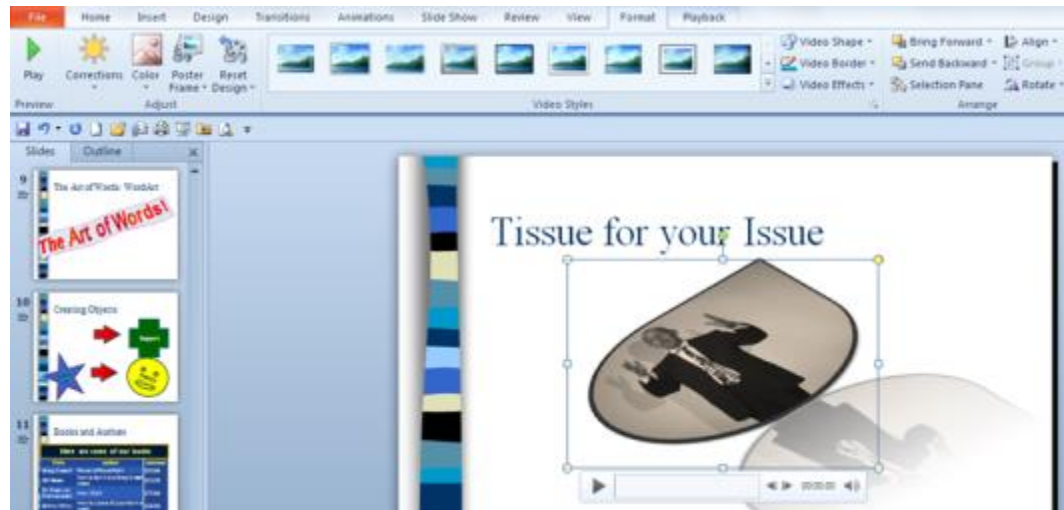
Word Text Effects

When you select text in Word 2010 you can add some interesting effects to your text with the New Text effects button and menu conveniently located in your Home Tab and Font Group. I am adding a shadow, reflection, and glow to the headings to a document. These effects add a lot of pizzazz to your text, as you can see, not to mention tacky.

Index

T

U

V

Z