

## **Book VIII**

# **Office 2010: One Step Beyond**

**The 5th Wave**

By Rich Tennant



*"I hate when you bring 'Office' with you on camping trips."*

# *Chapter 1: Customizing an Office Program*

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## *In This Chapter*

- ✓ Personalizing the Ribbon
- ✓ Changing around the Quick Access toolbar
- ✓ Choosing what appears on the status bar
- ✓ Choosing a new color scheme
- ✓ Devising keyboard shortcuts in Word

**T**his chapter describes a handful of things you can do to customize Office 2010 programs. Don't be afraid to make like a software developer and change a program to your liking. Many people are wary of retooling Office programs, but you can always reverse the changes you make if you don't like them, as I explain throughout this chapter.

This chapter shows how to put your favorite button commands on the Ribbon and Quick Access toolbar. Instead of fishing around for your favorite commands, you can assemble them on the Ribbon or Quick Access toolbar and locate them right away. You also discover how to change around the status bar, dress up an Office program in a new set of clothes, and designate your own keyboard shortcuts in Word.

## *Customizing the Ribbon*

As you surely know by now, the Ribbon is the stretch of ground across the top of all Office programs. The Ribbon is composed of tabs. On each tab, commands are arranged by group. To undertake a task, you visit a tab on the Ribbon, find the group with the command you want, and choose the command. If you are so inclined, you can customize the Ribbon. You can place the tabs and commands you know and love where you want to find them on the Ribbon. And you can remove tabs and commands that aren't useful to you.

### Exporting and importing program customizations

You can preserve your Ribbon and Quick Access toolbar customizations for posterity in a special file called an Import Customization file; these files have the .exportedUI file extension. Keep the file on hand for when you need it, or distribute the file to co-workers. For that matter, a co-worker who is proud of his or her customizations can send them to you in a file and you can load the customizations into your Office program.

To save your Ribbon and Quick Access toolbar customization settings in a file, go to the File tab, choose Options, and visit the Customize

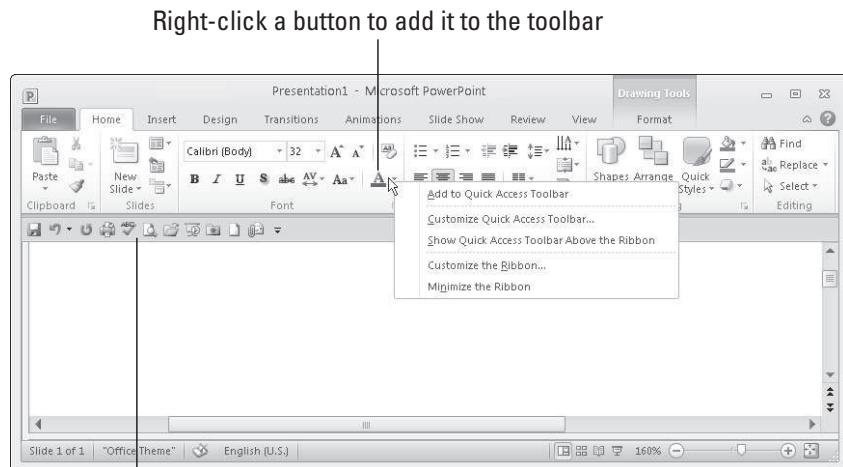
Ribbon or Quick Access Toolbar category of the Options dialog box. Then click the Import/Export button and choose Export All Customizations on the drop-down list. The File Save dialog box opens. Give the customizations file a name and click the Save button.

To load customizations from a file into your Office program, return to the Customize Ribbon or Quick Access Toolbar category of the Options dialog box, click the Import/Export button, and choose Import Customization File. You see the File Open dialog box. Select the file and click the Open button.

### Customizing the Quick Access Toolbar

No matter where you go in Office, you see the Quick Access toolbar in the upper-left corner of the screen. This toolbar offers the Save, Undo, and Repeat buttons. However, which buttons appear on the Quick Access toolbar is entirely up to you. You can put your favorite buttons on the toolbar to keep them within reach. And if the Quick Access toolbar gets too big, you can move it below the Ribbon, as shown in Figure 1-2. Adding buttons to and removing buttons from the Quick Access toolbar is, I'm happy to report, a piece of cake. And moving the toolbar below the Ribbon is as easy as pie.

**Figure 1-2:**  
Merely  
by right-  
clicking, you  
can add a  
button to  
the Quick  
Access  
toolbar.



The Quick Access toolbar below the Ribbon

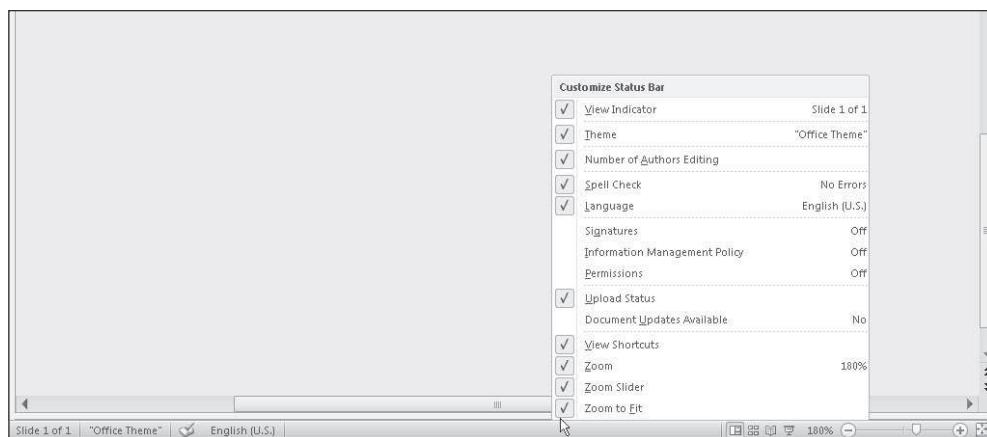
- ◆ **Quick Access toolbar below the Ribbon:** Right-click the toolbar, and on the shortcut menu, choose Show Quick Access Toolbar Below the Ribbon.
- ◆ **Quick Access toolbar above the Ribbon:** Right-click the toolbar, and on the shortcut menu, choose Show Quick Access Toolbar Above the Ribbon.

The Options dialog box offers a check box called Show Quick Access Toolbar Below the Ribbon (refer to Figure 1-3). You can select this check box as well to move the toolbar below the Ribbon.

## Customizing the Status Bar

The status bar along the bottom of the window gives you information about the file you're working on. The Word status bar, for example, tells you which page you're on, how many pages are in your document, and several other things. In PowerPoint, the status bar tells you which slide you're looking at and the theme you chose for your presentation. The status bar also presents the view buttons and Zoom controls.

To choose what appears on the status bar, right-click the status bar. You see a drop-down list similar to the one in Figure 1-4. By selecting and deselecting items in this list, you can decide what appears on the status bar.

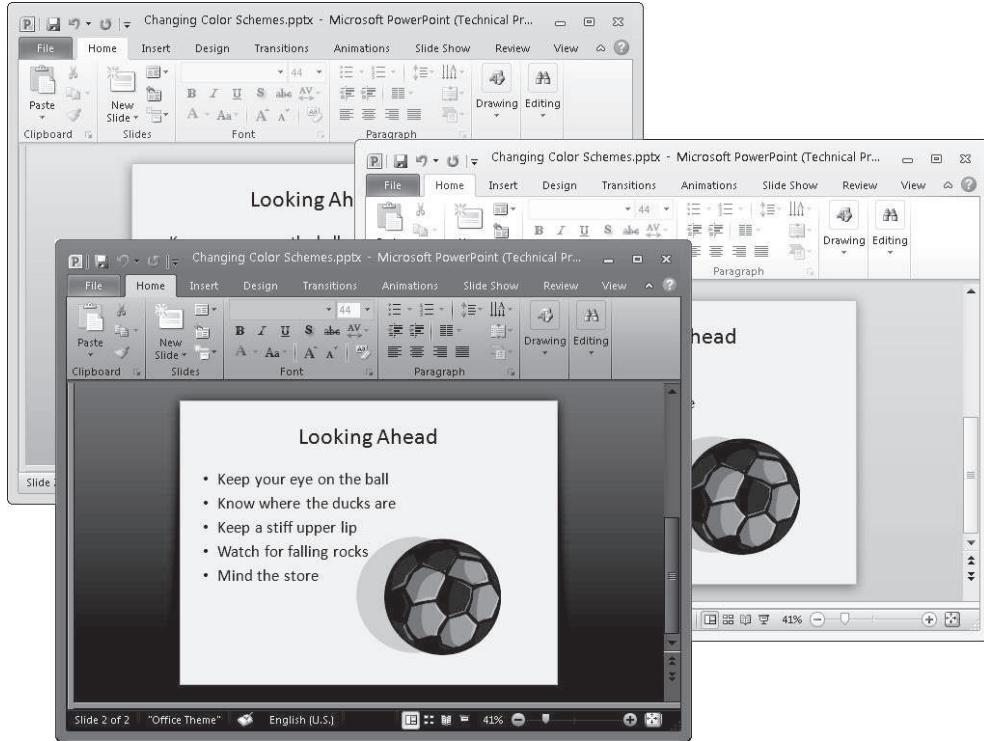


**Figure 1-4:**  
Right-click  
the status  
bar to  
customize it.

## Changing the Color Scheme

Figure 1-5 shows three color schemes with which you can dress up Excel, Outlook, Access, Word, Publisher, and PowerPoint: Blue, Silver, and Black. Which do you prefer? Follow these steps to choose a color scheme:

## 648 Customizing Keyboard Shortcuts in Word



**Figure 1-5:**

Take your choice of these color schemes: Blue (top), Silver (middle), or Black (bottom).

### 1. On the File tab, choose Options.

You see the Options dialog box.

### 2. Select the General category.

### 3. Open the Color Scheme drop-down list and choose Blue, Silver, or Black.

### 4. Click OK.

How do you like your new get-up?

## Customizing Keyboard Shortcuts in Word

In Microsoft Word, you can change the keyboard shortcuts. A *keyboard shortcut* is a combination of keys that you press to give a command. For example, pressing Ctrl+P opens the Print window; pressing Ctrl+S gives the Save command. If you don't like a keyboard shortcut in Word, you can change it and invent a keyboard shortcut of your own. You can also assign keyboard shortcuts to symbols, macros, AutoText entries, and styles.

# *Chapter 2: Ways of Distributing Your Work*

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## *In This Chapter*

- ✓ Printing files
- ✓ Saving files so that others can read them in Adobe Acrobat Reader
- ✓ Sending a file by e-mail
- ✓ Saving a file so that it can be viewed in a Web browser
- ✓ Writing and keeping a blog from inside Word

**T**his chapter explains how to distribute your work to co-workers and friends. You'll be glad to know that people who don't have Office 2010 can still read and review an Office 2010 file you created. You can print it for them, save it so that it can be read in Adobe Acrobat Reader, or save it as a Web page. This chapter explains all that as well as how to send a file right away by e-mail and write and post blog entries from inside Word.

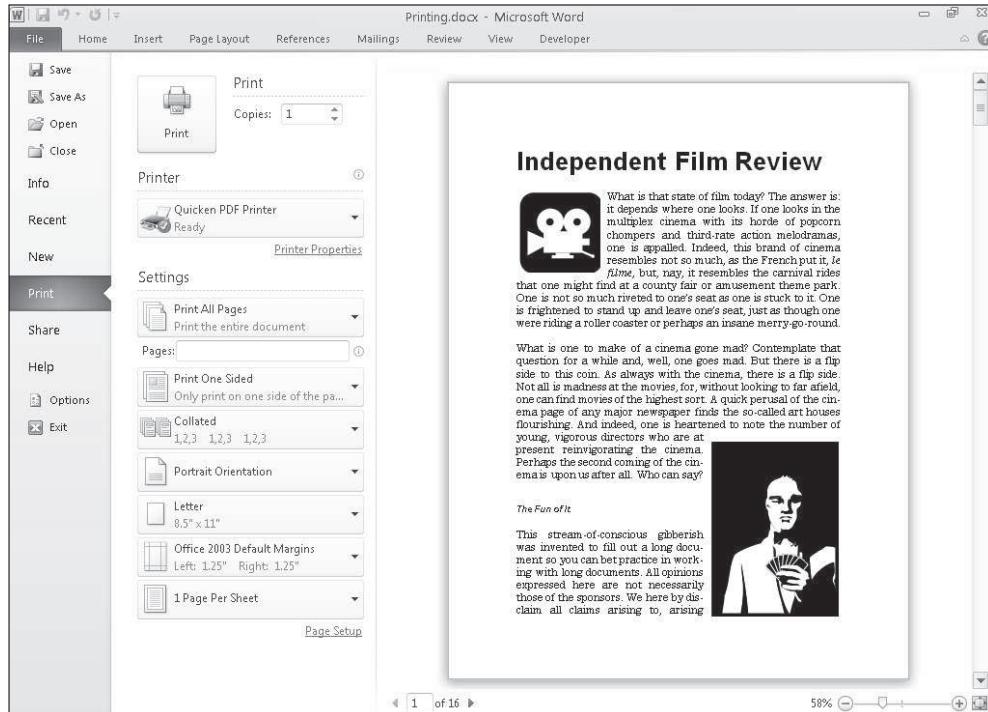
By the way, Book IV, Chapter 5 describes other ways to distribute PowerPoint presentations. You can provide audience handouts, ship presentations on CDs, and save presentations as video files.

## *Printing — the Old Standby*

In spite of predictions to the contrary, the paperless office is still a pipe dream. The day when Johnny at his computer is completely digitized and communicating with his colleagues without having to print anything on paper has yet to materialize. As for Jane, she can hardly go a day without printing reports, spreadsheets, and brochures. The office is still awash in paper, and all Jane and Johnny can do for consolation is try their best to recycle.

File

To print a file, preview a file before you print it, and do all else that pertains to printing, go to the File tab and choose Print (or press Ctrl+P). You land in the Print window, as shown in Figure 2-1. From here, you can choose how many copies to print, choose a part of a file to print, and get a look at your file before you print it. Notice that the Print window offers buttons for Zoom controls and buttons for going from page to page (or slide to slide).



**Figure 2-1:**  
Starting in  
the Print  
window, you  
can preview  
and print  
files.

## Distributing a File in PDF Format

As shown in Figure 2-2, you can save and distribute a file in the PDF (Portable Document File) format if the person to whom you want to give the file doesn't have the program with which it was created. For example, someone who doesn't have Excel can still view your Excel file in PDF format. Moreover, you can post PDF files on the Internet so that others can view them there.

### About PDF files

PDF files are designed to be viewed and printed in a program called Adobe Reader. This program is very good at acquiring data from other programs and presenting it so that it can be read and printed easily. Nearly every computer has Adobe Reader. If someone to whom you sent a PDF file doesn't have the program, they can download it for free at this Web page:

<http://get.adobe.com/reader/>

### ***Sending Your File in an E-Mail Message***

As long as you handle your e-mail with Outlook 2010, you can send the file you're working on to a friend or co-worker without having to open Outlook 2010. Moreover, you can send a PDF or XPS version of the file. You simply choose a command and send the thing over the Internet. Follow these steps to send an open file you're working on to a friend or co-worker:

File

- 1. Go to the File tab and choose Save & Send.**

The Save & Send window opens.

- 2. Choose Send Using E-Mail.**

- 3. Choose a Send Using E-Mail option on the right side of the window.**

How do you want to send your file? Click one of these buttons:

- *Send as Attachment*: Send the file as an attachment to an e-mail message.
- *Send a Link*: Send an e-mail link with a hyperlink to the file on a shared workspace.
- *Send as PDF*: Send a PDF version of the file as an attachment to an e-mail message.
- *Send as XPS*: Send an XPS version of the file as an attachment to an e-mail message.
- *Send as Internet Fax*: Send the file as an Internet fax (you must have signed up with an Internet fax service provider).

An Outlook 2010 message window appears with the name of your file on the subject line and the file itself in the Attach box. Your presentation is ready to send along with the e-mail message.

- 4. Enter the recipient's address in the To box and a message in the Message box.**

Book III, Chapter 3 explains how to address, compose, and send e-mail messages with Outlook.

- 5. Click the Send button.**

That was fast! It was faster than opening Outlook and attaching the file to the e-mail message on your own.

### ***Saving an Office File as a Web Page***

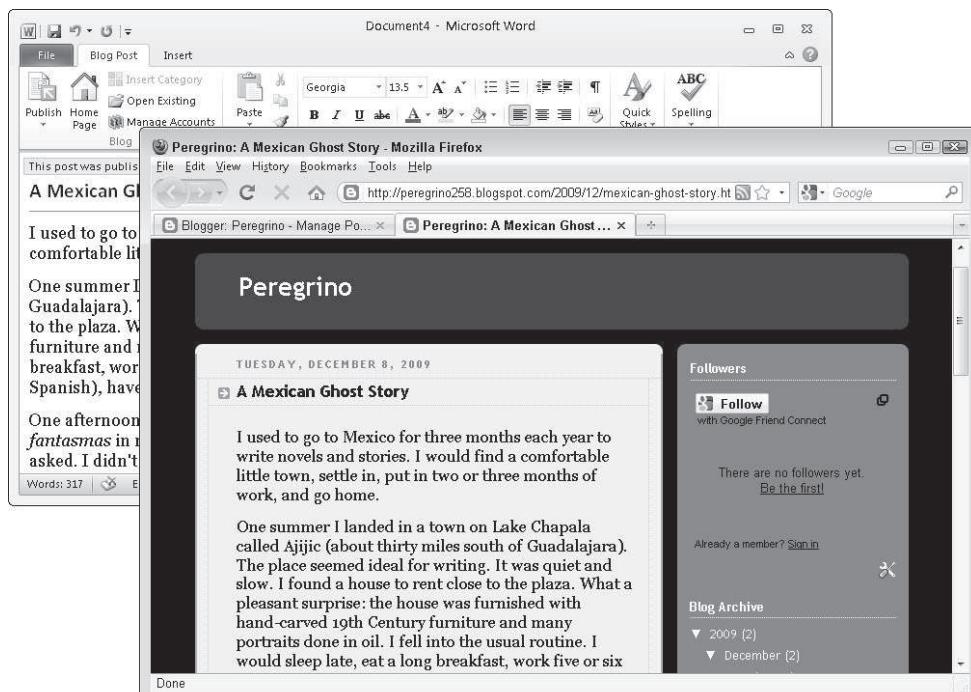
Figure 2-3 shows what a Word document looks like after it is saved as a Web page and displayed in a Web browser. Looks like a normal Word document, doesn't it? Anyone with a Web browser can view a Word document or other Office file after it's saved as a Web page. Save an Office file as a Web page and post it on the Internet so that people who don't have Office can view it.

## Blogging from inside Word

The word *blog* is shorthand for *Web log*. A typical blog is a hodgepodge of commentary and links to online news sources and often other blogs where topics of concern to the blogger are discussed. Many blogs are online diaries. You get a daily picture of what the blogger is interested in — dating, technology, politics, and just about anything else under the sun.

To make it easier to keep a blog, Word offers special commands for writing blog entries and posting them immediately with a blogging service. Figure 2-4 shows the blogging feature in action. The title and the blog entry in the Word document are transported *in toto* to the blog without your having to enter a password or even visit a blogging service. What's more, Word offers a special Blog Post tab for posting blog entries and managing accounts with your blogging service. To take advantage of Word's blogging feature, you must already have an account with a blogging service.

**Figure 2-4:**  
A blog entry  
written  
in Word  
(left) and  
posted to  
a blogging  
service  
(right).



## Describing a blog account to Word

Word can't post entries to a blog unless you tell it where the blog is located, what your password is, and some other juicy tidbits. As of this writing, Word is compatible with these blogging services: Blogger, Community Server, Sharepoint Blog, TypePad, and WordPress.

# *Chapter 3: Handling Graphics*

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## *In This Chapter*

- ✓ Understanding the different graphic file formats
- ✓ Placing a graphic in a Word document, PowerPoint slide, Excel worksheet, or Publisher publication
- ✓ Recoloring, cropping, and otherwise altering a picture
- ✓ Compressing graphics
- ✓ Handling graphics with Office Picture Manager

**A** picture, so they say, is worth a thousand words. Whether it's worth a thousand words or merely 950 is debatable. What is certain is that visuals help people remember things. A carefully chosen image in a PowerPoint presentation, Word document, Excel worksheet, or Publisher publication helps others understand you better. The image reinforces the ideas or information that you're trying to put across.

This chapter explains how you can make pictures — photographs and graphics — part of your Word documents, PowerPoint presentations, Excel worksheets, and Publisher publications. It looks into graphic file formats, copyrights, and other issues pertaining to graphics as well as how to touch up graphics in an Office program and in an auxiliary program called Office Picture Manager.

By the way, the next chapter looks at another way to decorate your work with images. It looks at using clip art.

## *All about Picture File Formats*

Graphics and photographs come in many different file formats, and as far as Office 2010 is concerned, some are better than others. These pages explain what you need to know about graphic files to use them wisely in Office files. Here, you find out what bitmap and vector graphics are, what resolution and color depth are, and how graphic files are compressed.

- ◆ **Lossless compression:** To maintain the picture's integrity, the same number of pixels is stored in the compressed file as in the original. Because the pixels remain intact, you can change the size of a file that has undergone lossless compression without losing picture quality.
- ◆ **Lossy compression:** Without regard for the picture's integrity, pixel data in the original picture is lost during compression. Therefore, if you try to enlarge a picture that has undergone lossy compression, the picture loses quality.

### *Choosing file formats for graphics*



One of the challenges of using graphics and photographs in Office files is keeping file sizes to a minimum. A file that is loaded down with many photographs can take a long time to load and send over the Internet because graphics and photographs make files that much larger. The trick is to find a balance between high-quality, high-resolution graphics and the need to keep files sizes low. Here are some tips for choosing graphic file formats:

- ◆ Consider sticking with vector graphics if you're including graphics in your file strictly for decoration purposes. As Chapter 4 of this mini-book explains, Office provides vector clip-art images. These images are easy to come by, don't require very much hard drive space, and can be edited inside Word, PowerPoint, Excel, and Publisher.
- ◆ For photographs, make JPEG your first choice for graphics. JPEG images have a fairly high resolution. If you intend to post your file on the Internet, you can't go wrong with JPEGs; they are the de facto photograph standard on the Internet.
- ◆ If you're dealing with black-and-white photos or resolution doesn't matter, use GIF files. These files eat up the least amount of hard drive space.

### *The All-Important Copyright Issue*

To save any image on the Internet to your computer, all you have to do is right-click it and choose Save Picture As. By starting from Google Image Search ([www.images.google.com](http://www.images.google.com)), you can scour the Internet for any image you need. Never before has it been easier to obtain images for your own use.

Still, obtaining images and using them legally are two different matters. Would it surprise you to know that the vast majority of graphics can't be used without the owner's permission? The copyright laws have a "fair use" provision for borrowing written words. You can quote others' words as long as you cite the author and work and you don't quote passages longer than 250 to a thousand words (the "fair use" provision is vague on this point).

The copyright law regarding graphics is quite straightforward. Unless you have the owner's permission, you can't legally use a graphic.

Sometimes it's hard to tell who owns a graphic. The artist or photographer (or his or her estate) doesn't necessarily own the copyright because artists sometimes relinquish their copyrights when they create works for hire. The only way to get permission to use a graphic is to ask. Contact the owner of the Web site with the image you want, the publisher if the image is in a book, or the museum if the work is owned by a museum. You will be asked to write a letter describing precisely how you intend to use the image, reproduce it, and distribute it. Your letter should also say how long you intend to use it and at what size you intend to reproduce it.

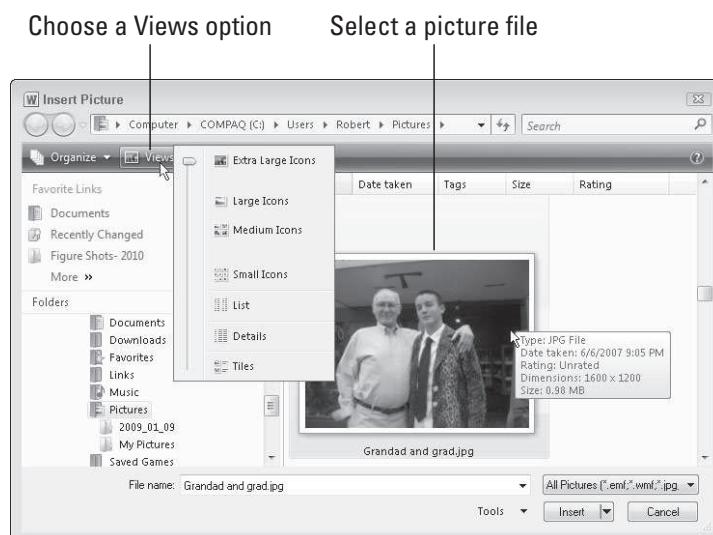
## Inserting a Picture in an Office File

After you've weighed the merits of different kinds of graphics and decided which one is best for you, you can insert it. Inserting a picture is as simple as choosing it in the Insert Picture dialog box. Follow these steps to insert a picture on a PowerPoint slide, Word document, Excel worksheet, or Publisher page:

1. Go to the Insert tab.
2. Click the Picture button.



You see the Insert Picture dialog box, as shown in Figure 3-2. In PowerPoint, you can also open this dialog box by clicking the picture icon in a content placeholder frame.



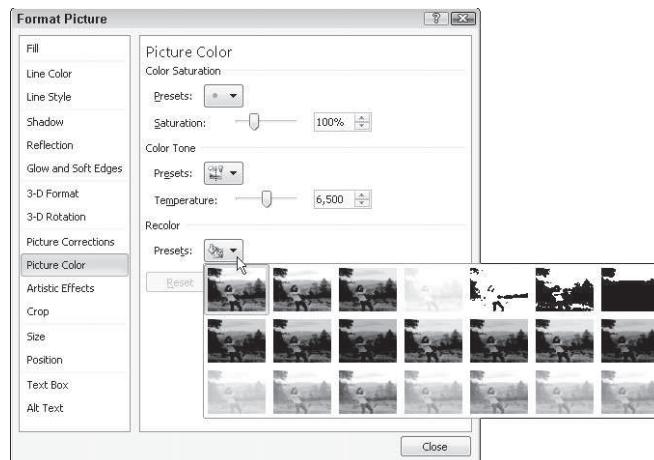
**Figure 3-2:**  
You can  
preview a  
picture file  
before you  
insert it.

## Touching Up a Picture

Every picture can be a collaboration. You can do the following to make a picture your own as well as the work of the original artist:

- ◆ **Softening and sharpening:** Mute or polish a picture. See “Softening and sharpening pictures,” later in this chapter.
- ◆ **Changing the brightness and contrast:** Adjust a picture’s tone. See “Correcting a picture’s brightness and contrast.”
- ◆ **Recoloring:** Give your picture a brand-new set of colors or gray shades. See “Recoloring a picture.”
- ◆ **Choosing an artistic effect:** Take your picture for a walk on the wild side. See “Choosing an artistic effect.”
- ◆ **Choosing a picture style:** Present your picture in an oval frame, soft-edged frame, or other type of frame. See “Selecting a picture style.”
- ◆ **Cropping:** Cut out the parts of a picture that you don’t want. See “Cropping off part of a picture.”
- ◆ **Removing picture areas:** Keep the essentials of a picture and remove the rest. See “Removing the background.”

To touch up a picture, visit the (Picture Tools) Format tab. As shown in Figure 3-3, you can also open the Format Picture dialog box and choose settings in these categories: Picture Corrections, Picture Color, Artistic Effects, and Crop. To open the Format Picture dialog box, right-click a picture and choose Format Picture on the shortcut menu.



**Figure 3-3:**  
Touching up  
a photo in  
the Format  
Picture  
dialog box.

Keep your eye on what's magenta and what's not as you use these techniques, and consider zooming to 200 percent or more so that you can get a good look at your picture:

- *Changing the size of the box:* Drag the side and corner handles of the box to capture what you want to keep or remove.
- *Marking what you want to keep:* Click the Mark Areas to Keep button. The pointer changes into a pencil. Click your picture to indicate what you want to keep. Each time you click, a keep mark (a plus sign icon) appears on your picture.
- *Marking what you want to remove:* Click the Mark Areas to Remove button. The pointer changes to a pencil. Click your picture to indicate what you want to remove. When you click, a remove mark (a minus sign) appears.
- *Deleting keep and remove marks:* Click the Delete Mark button and then click a keep or remove mark to remove a mark and change what is and isn't removed from the picture.

Of course, you can click the Undo button to backtrack as you work. If you get thoroughly lost on the Background Removal tab, click the Discard All Changes button and start all over.



### 3. Click the Keep Changes button when you finish marking what you want to keep and remove.

How do you like your picture now? If it needs more work, click the Remove Background button again and diddle some more on the Background Removal tab. Click the Discard All Changes button if you want your original picture without the background removed.

## Compressing Pictures to Save Hard Drive Space

By compressing pictures, you reduce their file size and consequently the size of the file you're working on. Not all pictures can be compressed, as "Compression" explains earlier in this chapter, and some types of graphics lose their integrity when they're compressed. You can't resize lossy-compressed graphics without their looking odd.

Compress pictures to make files load faster and make e-mail messages with file attachments travel faster over the Internet. Compressing a picture file reduces its pixels per inch (ppi) setting. Follow these steps to compress pictures:

1. **Optionally, select the picture or pictures you want to compress if you want to compress only one or two.**

The Compress Pictures command compresses all the graphics in a file unless you select graphics first.

2. Go to the (Picture Tools) Format tab.



3. Click the Compress Pictures button.

You see the Compress Pictures dialog box.

4. Select the **Apply to Selected Pictures Only** check box if you selected graphics in Step 1 and you want to compress only a couple of graphics.
5. Click the **Delete Cropped Areas of Pictures** check box if you want to delete the unused portions of pictures you cropped.

As “Cropping off part of a picture” explains earlier in this chapter, Office crops graphics in name only. It retains the cropped part of the graphic in case you want it back, but you can remove the cropped part as well by selecting this check box.

6. Choose a target output for the pictures.

These options tell Office which pixels per inch (ppi) setting to use when compressing graphics. Which setting you choose depends on where you intend to show your graphics. Graphics to be shown on a computer monitor need be no more than 72 ppi. If you intend to print your graphics, choose a setting in the 600–3000 ppi range. To print for an offset publication, choose an even higher setting.

7. Click OK.

## *Using Microsoft Office Picture Manager*

You may not know it, but you installed a program for managing and editing pictures when you installed Office. The program is called Microsoft Office Picture Manager, and you can use it to organize graphics and touch up graphics before inserting them in a PowerPoint, Word, Excel, or Publisher file. As shown in Figure 3-11, Picture Manager displays graphics so that you can see precisely what your editorial changes do to them. The program makes it easy to find and organize graphic files on your computer. It also provides tools for editing graphics.

To open Picture Manager, click the Start button and choose All Programs→Microsoft Office→Microsoft Office 2010 Tools→Microsoft Office Picture Manager. You see the window shown in Figure 3-11. Starting there, you can display a graphic on your computer and change its appearance in several different ways.

# Chapter 4: Decorating Files with Clip Art

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## In This Chapter

- ✓ Understanding what clip art is
- ✓ Placing a clip-art image on a page, slide, or worksheet
- ✓ Changing the look of a clip-art image
- ✓ Using the Clip Organizer to store, organize, and insert clip art

This chapter explains how you can use clip art to decorate Word documents, PowerPoint slides, Excel worksheets, and Publisher publications. You also find a treatise on how to use the *Microsoft Clip Organizer*, an auxiliary program for storing clip art and other kinds of media files so that you can find the files in a hurry. If you often use media files in your work, you owe it to yourself to look into the Clip Organizer.

## What Is Clip Art?

In the old days, long before the invention of computers, people would buy clip-art books. They would literally cut, or clip, images from these books and paste them into posters, letters, and advertisements. Today's clip art is the digital equivalent of old-fashioned clip art. You can paste clip art into computer programs such as Word, PowerPoint, Excel, and Publisher. You can resize clip-art images without the images losing their integrity. The clip art that comes with Office 2010 isn't encumbered by licensing restrictions; it's in the public domain, and you can use it as you please.

Figure 4-1 shows examples of some clip-art images that come with Office. Use images like these to decorate your files. Use them to help illustrate an idea or simply to add a little liveliness to your work. In my experience, the hardest task where clip art is concerned is finding the right image. You can choose from so many images that finding the right one is a chore.



**Figure 4-1:**  
Examples  
of clip-art  
images.

### Inserting a Clip-Art Image

To insert a clip-art image, you open the Clip Art task pane, search in the Clip Organizer for the image you want, and insert the image. The trick to finding the right image is knowing your way around the Clip Organizer. The majority of this chapter explains how to organize the art on your computer so that you can get it by way of the Clip Organizer. For now, you can follow these basic steps to insert a clip-art image in a page, slide, or worksheet:

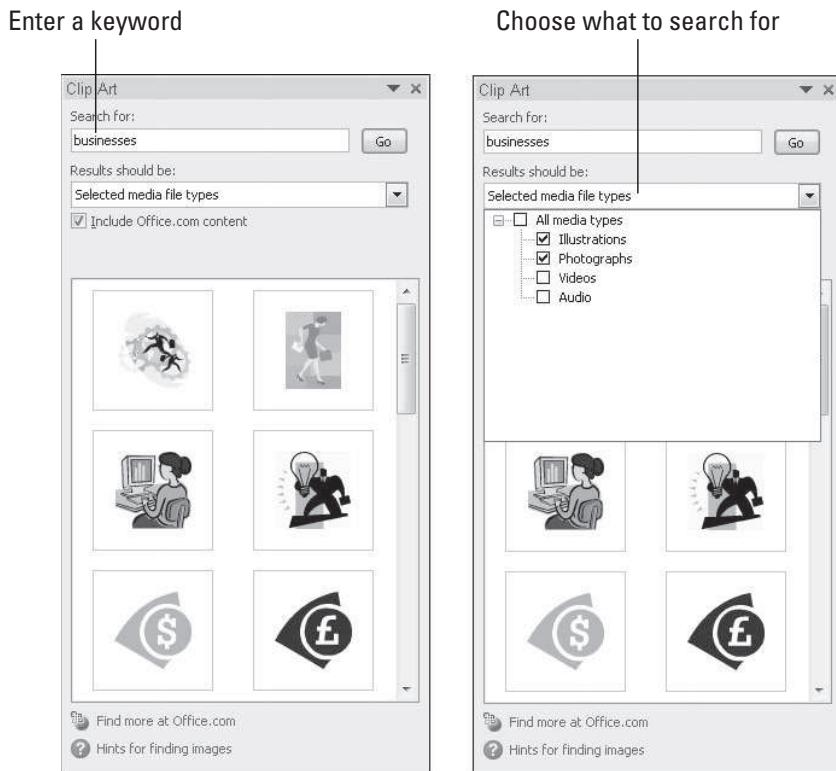
- 1. Go to the Insert tab.**
- 2. Click the Clip Art button.**



You see the Clip Art task pane, as shown in Figure 4-2. In PowerPoint, you can also click the Clip-Art icon to insert a clip-art image in a content placeholder frame.

The Clip Art task pane is actually an entrée into the *Clip Organizer*, the Microsoft program for organizing and quickly inserting clip art. (The Clip Organizer is explained in more detail later in “Handling Media Files with the Clip Organizer.”)

- 3. In the Search For text box, enter a keyword that describes the clip-art image you need.**  
Later in this chapter, “Searching for a media file in the Search pane” explains how keywords work.
- 4. Select the Include Office.com content check box (and make sure that your computer is connected to the Internet) to search for images online as well as on your computer.**
- 5. In the Results Should Be drop-down list, choose Illustrations, and if you want to search for photos as well, choose Photographs (refer to Figure 4-2).**



**Figure 4-2:**  
Inserting  
a clip-art  
image by  
way of the  
Clip Art task  
pane.

**6. Click the Go button.**

The bottom of the task pane shows the clip-art images found in your search. You may have to scroll through the task pane to see all the images.

**7. Double-click an image or open its drop-down list and choose Insert to place it in your Word document, PowerPoint slide, Excel worksheet, or Publisher publication.**

Your next task is to move the image into position and perhaps change its size. Book I, Chapter 8 explains how to manipulate clip-art images and other objects.

Book VIII  
Chapter 4

## *Tinkering with a Clip-Art Image's Appearance*

Sometimes a clip-art image doesn't sit well with the rest of the page, slide, or worksheet. The image is too bright or too dark. It clashes with the other images. When an image clashes, you don't have to abandon it in favor of another image. As Figure 4-3 shows, you can alter a clip-art image's appearance in different ways.

Decorating Files  
with Clip Art

Select your image, go to the (Picture Tools) Format tab, and change the image's appearance. Chapter 3 of this mini-book describes the different ways to touch up a picture or clip-art image.

**Figure 4-3:**

You can change the look of a clip-art image.



## Handling Media Files with the Clip Organizer

As computers get faster and better, media files — clip art, graphics, video clips, and audio files — will play a bigger role in computing. Dropping a clip-art image in a Word document or PowerPoint slide won't be a big deal. Playing video clips on PowerPoint slides will be commonplace.

Well aware that the future is closing in on us, Microsoft created the Clip Organizer to help you manage the media files on your computer. By using the Clip Organizer, you can place graphics, video clips, and audio files in Word documents, PowerPoint presentations, Excel worksheets, and Publisher publications. More important, the Clip Organizer is the place to organize media files in your computer so that you can find them and make good use of them. These pages explain how to manage the Clip Organizer.

To open the Clip Organizer, click the Start button and choose All Programs $\Rightarrow$ Microsoft Office $\Rightarrow$ Microsoft Office 2010 Tools $\Rightarrow$ Microsoft Clip Organizer.

### *Knowing your way around the Clip Organizer*

As shown in Figure 4-4, the Clip Organizer is divided in two parts, with a pane on the left and a window for displaying files on the right. The Clip Organizer offers two panes: Collection List and Search.

- ◆ **Collection List task pane:** Use the Collection List task pane to organize your media files and to quickly locate and insert a media file. To display the Collection List task pane, click the Collection List button or choose View $\Rightarrow$ Collection List.
- ◆ **Search task pane:** Use the Search task pane to locate a media file on your computer. Notice that this task pane is similar to the Clip Art task pane in Office programs (refer to Figure 4-2). To display the Search task pane, click the Search button or choose View $\Rightarrow$ Search.

# *Chapter 5: Note Taking with OneNote*

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## *In This Chapter*

- ✓ Getting acquainted with OneNote
- ✓ Creating notebooks, sections, pages, and subpages for storing notes
- ✓ Writing and drawing notes
- ✓ Navigating in OneNote
- ✓ Organizing and finding stray notes
- ✓ Selecting, moving, and deleting notes, sections, and pages
- ✓ Using OneNote in conjunction with other Office programs

**M**icrosoft OneNote is designed for taking notes — at meetings, at conferences, or when talking on the telephone. Rather than scribble notes indiscriminately in a Word document, you can enter them in OneNote and be able to retrieve them later. You can use your notes as building blocks for reports and white papers. You can copy them to Excel, PowerPoint, Word, or another Office 2010 program. OneNote comes with all sorts of amenities for finding and filing notes. OneNote can help you brainstorm and organize your ideas.

This chapter explains what OneNote is, how you can use it to write notes, and how to organize and find notes. Finally, it explains a couple of tricks for recycling notes into other Office programs.

## *Running OneNote*

Do one of the following to run OneNote:

- ◆ Click the Start button and choose All Programs→Microsoft Office→Microsoft Office OneNote 2010.
- ◆ Right-click the OneNote icon in the Notification area (it's located in the lower-right corner of the screen next to the clock) and choose Open OneNote. If you don't see the icon in the Notification area and you want to see it there, go to the File tab in OneNote, choose Options on the drop-down list, visit the Display category in the Options dialog box, and select the Place OneNote Icon in the Notification area of the Taskbar check box.

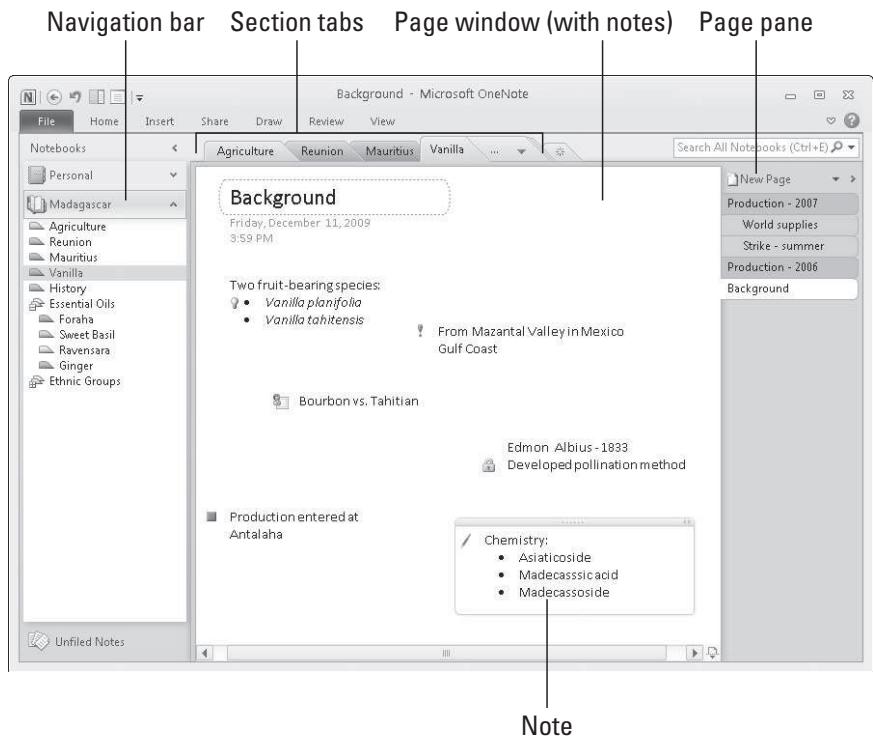
OneNote opens to the notebook, section, and page that was open the last time you closed the program.



OneNote is unusual among Office programs in that it doesn't have a Save button or Save command. Every 30 seconds, OneNote saves all the notes for you. You needn't concern yourself with whether notes are being saved.

### Introducing OneNote

Figure 5-1 shows the OneNote screen. The purpose of OneNote is to help you enter notes, keep track of notes, find notes when you need them, and organize your notes. Read on to discover how to find your way around OneNote and how OneNote organizes notes into notebooks, sections, and pages.



**Figure 5-1:**  
The  
OneNote  
screen.

### Finding your way around the OneNote screen

Apart from the Ribbon along the top of the screen, these are the four main areas of OneNote (refer to Figure 5-1):

## ***Creating Storage Units for Notes***

Before you write your first note, give a moment's thought to organizing notes in the notebook-section-pages hierarchy. Think of descriptive names for your notebook, sections, section groups, and pages. Then get to work creating the storage units you need for your notes. These pages explain how to do it.

### ***Creating a notebook***

OneNote creates a new notebook for you automatically the first time you start the program. This notebook is called Personal. Follow these steps to create a new notebook:

File

- 1. On to the File tab, choose New.**

The New Notebook window opens. You can also right-click the Notebooks pane and choose New Notebook.

- 2. Choose Web, Network, or My Computer to tell OneNote where you intend to store the notebook you are about to create.**
- 3. Enter a name for the notebook.**
- 4. Select the folder in which you will store the notebook.**

To do so, click the Browse button and select a folder in the Select Folder dialog box.

- 5. Click the Create Notebook button.**

The new notebook opens on-screen. OneNote creates a section (called New Section 1) and a page (called Untitled Page) in your notebook.

- 6. Change the name of the section and page.**

Follow these instructions to change section and page names:

- *Changing the section name:* Right-click the section name, choose Rename on the shortcut menu, and enter a descriptive name. You can also double-click a name and enter a new one.
- *Changing the page name:* Enter a name in the Title text box at the top of the page provided for names. After you enter the name, the new name appears as well on the Page pane on the right side of the screen.

To delete a notebook, close OneNote, open Windows Explorer or Computer, go to the folder where the notebook is stored, and delete the folder. To find out where notebooks are stored by default on your computer, go to the File tab, choose Options, go to the Save & Backup category of the OneNote Options dialog box, and look for the Default Notebook Location.

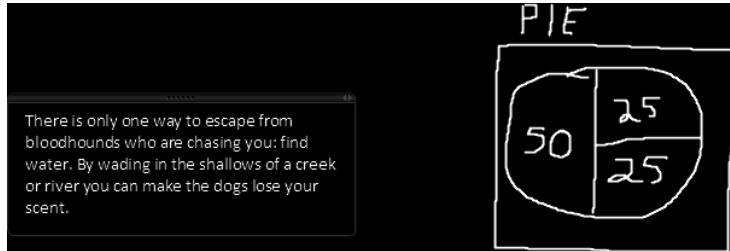
## Writing Notes

Although the program is called OneNote, you can enter three kinds of notes. You can enter typed notes, drawings, and screen clippings. Moreover, if you're using a Tablet PC to scribble your notes, OneNote can (at least in theory) recognize whether you're writing by hand or drawing. These pages explain how to type notes, draw notes, and take screen captures in notes.



Notes appear in what are called *containers*, as shown in Figure 5-2. Move the pointer over the top of a container and you see the four-headed arrow. At that point, you can click and drag a note elsewhere. Drag the right side of a note container to change its width.

**Figure 5-2:**  
A typed note  
(left) and a  
drawn note  
(right).



### Typing a note

To type a note, simply click and start typing. Press the Enter key to begin a new paragraph in a note. You can draw upon the commands on the Home tab — do you recognize them from Microsoft Word? — to format the text or change its color.



To get more room on a page for notes, try collapsing the Navigation bar and page tabs. To do so, press F11 or go to the View tab and click the Full Page View button.

### Drawing with a pen or highlighter

Follow these steps to draw a note with a pen or highlighter:

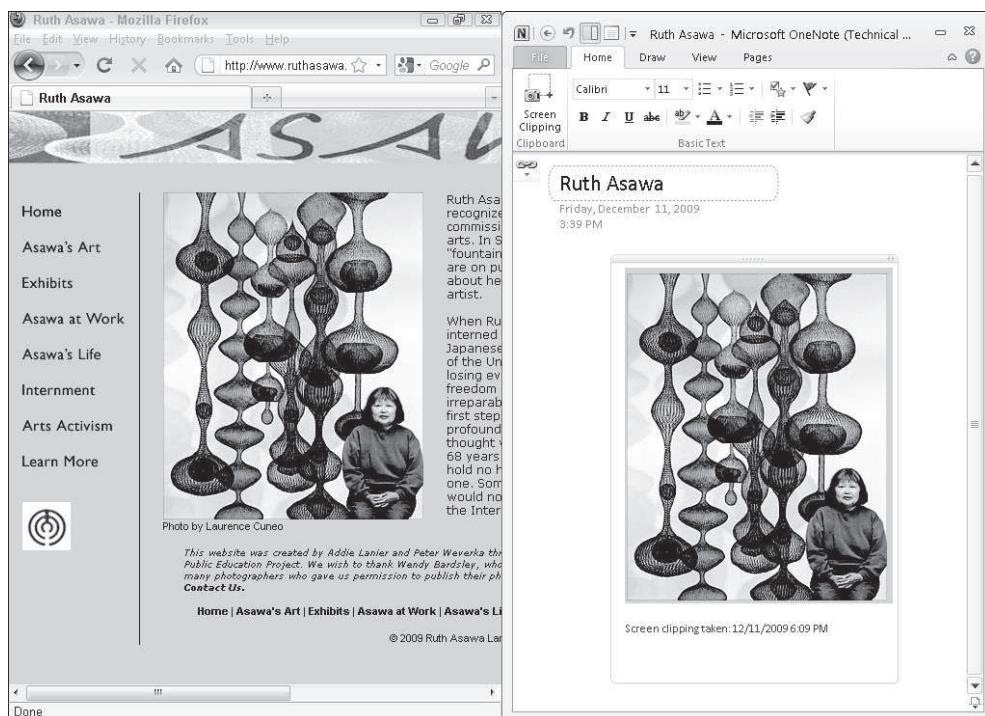


1. On the Draw tab, click the Select & Type button.
2. Open the Pens gallery and choose a pen or highlighter.
3. Start drawing.

Click the Eraser button and click a line if you need to erase something you wrote or drew. Choose a shape from the Insert Shape gallery if that improves your drawing skills.

4. Press Esc or click the Select & Type button again when you finish drawing or highlighting.

- ◆ **Starting in the Notification tray:** Right-click the OneNote icon in the Notification tray and choose Create Screen Clipping (or press Windows key+S). Then drag the pointer on your screen to capture the part of the screen you want for the clipping. The Select Location in OneNote dialog box appears. Do one of the following:
  - Select a section in the dialog box and click the Send to Selected Location button. OneNote creates a new page in the section you chose for the clipping and places the clipping on the page.
  - Click the Copy to Clipboard button. Back in OneNote, right-click a page and choose Paste to paste the clipping into OneNote.



**Figure 5-3:**  
A screen  
clipping  
taken from a  
Web page.

## Getting from Place to Place in OneNote

As you fill up a notebook with sections, section groups, pages, subpages, and notes, finding the place you need to be to enter or read a note gets more difficult. Here are ways to get from section to section or page to page in the OneNote window:

- ◆ **Going to a different notebook:** Click a notebook button on the Navigation bar. Use one of these techniques to find out where clicking a notebook button takes you:

- Move the pointer over a button. You see a notebook's name and the folder where it is stored in a ScreenTip box.
- If the Navigation bar is collapsed, click the Expand Navigation Bar button. Now you can see the names of notebooks as well as the names of notebook sections on the Navigation bar. The Expand Navigation Bar button is located at the top of the Navigation bar.
- ◆ **Going to a different section or section group:** Click the name of a section or section group in the Navigation bar or along the top of the window. Section group names are listed at the bottom of the Navigation bar and to the right of section names. You can expand and collapse section groups in the Navigation bar by clicking the plus or minus sign on a section group symbol.
- ◆ **Go to a different page:** Click a page or subpage tab on the right side of the window. To make more room for page and subpage names, click the Expand Page Tabs button. You can find it to the right of the New Page button.

## *Finding and Keeping Track of Notes*

If you're an habitual note taker, you may find yourself drowning in notes. You won't be able to find the note you're looking for. The great idea you had may be lost forever. To keep notes from getting lost, these pages explain how to find stray notes and how to organize notes so that they don't get lost in the first place.

### *Finding a stray note*

To find a lost note, you must be able to remember a word or two in the note. Follow these steps to chase down a lost note:

**1. Click in the Search box.**

This box is located to the right of the Section tabs, above the Page pane. As soon as you click in the Search box, a menu opens for telling OneNote where you want to search.

**2. To declare where you want to search for the note, click the Change Search Scope button (it's on the right side of the Search box) and choose This Section, This Notebook, or another option on the drop-down list.**

You can also open this drop-down list by clicking the Type to Search In hyperlink.

**3. Enter the word or phrase you're looking for in the Search box.**

**4. Click the Find button.**

OneNote lists all notes with the text you entered.

**5. Click a note to go to the page where it is located.**

To remove a tag, open the Tags gallery and choose Remove Tag.

### **Arranging tagged notes in the task pane**

Follow these steps to arrange notes that you tagged in the Tags Summary task pane:



**1. On the Home tab, click the Find Tags button.**

You see the Tags Summary task pane (refer to Figure 5-4).

**2. Open the Group Tags By drop-down list and choose an option.**

These options determine the order in which tagged notes appear in the task pane. Tag Name, for example, arranges notes according to which icon they're tagged with; Section arranges notes under section names; Note Text arranges notes in alphabetical order.

**3. Open the Search drop-down list and choose an option.**

These options determine which notes appear in the task pane. This Section, for example, assembles only flagged notes from the section that appears on-screen; This Notebook gathers flagged notes from all sections in the notebook you're viewing.

A list of notes appears in the task pane.

**4. Click the name of a note you want to visit.**

OneNote opens the page with the note whose name you clicked and selects the note.



To remove tags from notes, select the notes and press Ctrl+0 (zero), or open the drop-down list on the Tags gallery and choose Remove Tag.

## **Some Housekeeping Chores**

Unless you play loud soul music while you're doing it, housekeeping can be a tedious and irksome activity. Here are methods for handling a few housekeeping chores:

- ◆ **Selecting notes:** Click the bar along the top of a note to select it. Ctrl+click to select several notes.
- ◆ **Moving notes to another page:** Use the tried-and-true cut-and-paste method. Select the note, right-click, choose Cut, right-click the page where you want to move the note, and choose Paste.
- ◆ **Moving a page to another section:** Right-click the page's tab and choose Move or Copy (or press Ctrl+Alt+M). You see the Move or Copy Pages dialog box. Select a section name and click the Move or Copy button.

- ◆ **Removing a notebook from the Navigation bar:** To remove a notebook's name from the Navigation bar and keep the bar from getting too crowded, right-click the notebook's button and choose Close This Notebook. To reopen a notebook, go to the File tab, choose Open, click the Open Notebook button, and select the notebook's name in the Open Notebook dialog box.
- ◆ **Deleting notes:** Select the notes you want to delete and press the Delete key or right-click and choose Delete.
- ◆ **Deleting a section:** Right-click the section tab and choose Delete. Because each section is actually a file, you can recover a section you deleted accidentally by retrieving it from the Recycle Bin.
- ◆ **Deleting a page or subpage:** Right-click the page tab and choose Delete. You can't recover a page of notes that you delete this way.



OneNote maintains a Recycle Bin of its own. If you mistakenly delete a section or page, you can recover it by going to the Share tab and clicking the Notebook Recycle Bin button. Sections and pages you deleted appear (deleted pages appear on the Deleted Pages tab). To restore a section or page, right-click it, choose Move or Copy, select the section you want to restore in the Move or Copy dialog box, and click the Move button.

## OneNote and Other Office Programs

OneNote works hand in hand with its brothers and sisters in the Office suite. These pages describe how to recycle material from OneNote into other Office programs and recycle material from other Office programs into OneNote.

### Using data from OneNote in other Office programs

To make use of OneNote data in other Office programs, you can copy the data, link it to a Word or PowerPoint file, send it by e-mail, or turn it into an Outlook task. Better keep reading.

#### Copying a note into another Office program

To copy a note into another program, use the copy-and-paste command. Select the note, right-click, and choose Copy. Then go to the other program, right-click, and choose Paste. Typed notes land in the other program in the form of text. Drawn notes land as Portable Network Graphics (.png) files.

#### Linking a Word or PowerPoint file to OneNote

By linking a Word or PowerPoint file to a OneNote section or page, you can open OneNote from inside Word or PowerPoint and refer right away to notes

# Chapter 6: Automating Tasks with Macros

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## In This Chapter

- ✓ Understanding what a macro is
- ✓ Displaying and hiding the Developer tab
- ✓ Examining macro security issues
- ✓ Recording, running, and editing a macro
- ✓ Placing a macro button on the Quick Access toolbar

This brief chapter explains how macros can make your work a little easier. I describe how to display the Developer tab on the Ribbon, record a macro, run a macro, and edit a macro. I also look into macro security issues and show you how to place a macro button on the Quick Access toolbar.

## What Is a Macro?

A *macro* is a set of command instructions recorded under a name. When you activate a macro, the program you're working in carries out the instructions in the macro. Macros help automate repetitive and complex tasks. Instead of entering commands yourself, the macro does it for you — and it enters the commands faster and more efficiently. Instead of reaching into several dialog boxes to get a task done, you can run a macro and let it do the work.



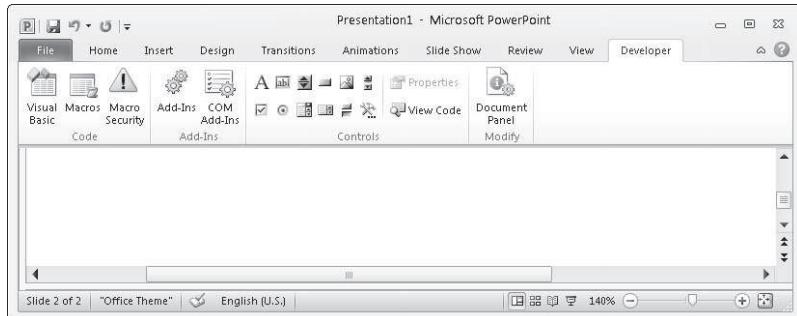
Not that you necessarily need to know it, but playing a macro involves running command sequences in *Visual Basic for Applications* (VBA), a programming language built into all the major Office 2010 applications. Behind the scenes, the application you're working in executes VBA code when you run a macro.

## Displaying the Developer Tab

Before you can run a macro or do anything in the wonderful world of macros, you must display the Developer tab. Figure 6-1 shows the Developer tab in PowerPoint. Follow these steps to display or remove this tab:

## 710 Managing the Macro Security Problem

**Figure 6-1:**  
The  
Developer  
tab (in  
PowerPoint).



**1. On the File tab, choose Options.**

You see the Options dialog box.

**2. Go to the Customize Ribbon category.**

**3. On the right side of the dialog box, select the Developer check box.**

**4. Click OK.**

## Managing the Macro Security Problem

A macro is a little (and sometimes not so little) computer program in its own right. As such, macros can contain computer viruses. When you run a macro in a PowerPoint presentation, Word document, Excel workbook, or any other file, you run the risk of infecting your computer with a virus.

To help protect you against macro viruses, Office gives you the opportunity to decide how you want to handle files that contain macros. You can disable all macros, disable some macros, or enable all macros. (If you're working in an office on a network, the network administrator may have decided for you whether you can run macro files on your computer. Network administrators can disable all files that contain macros.)

Follow these steps to tell Office how you want to handle macros:

**1. On the Developer tab, click the Macro Security button.**

 You see the Macro Settings category of the Trust Center dialog box, as shown in Figure 6-2.

**2. Under Macro Settings, declare how you want to handle Office files that contain macros.**

Your choices are as follows:

- *Disable All Macros without Notification:* You can't run macros, and moreover, you're not alerted to the fact that your file contains macros or given the opportunity to enable the macros.

## Recording a Macro

Recording a macro in an Office application is a matter of turning on the Macro Recorder and giving commands. The Macro Recorder is modeled after a tape recorder. You turn on the recorder, choose commands, and turn the thing off. Following are ground rules and instructions for recording macros.



Unless you want to construct them on your own using VBA code, you can't record your own macros in PowerPoint, Outlook, or Publisher. (You can record macros in Word, Excel, and Access.) To make use of macros in PowerPoint, Outlook, or Publisher, you have to obtain them from a developer or have them already in your files.

### Enabling your files for macros

To record macros, you must make sure that the file in which you record them is *macro enabled*. Macro-enabled files have file extensions that end in *m* (the *m* stands for "macro"). Excel files have the extension *.xlsm*, PowerPoint files the extension *.pptm*, and Word files the extension *.docm*.

Follow these steps to macro-enable a file so that you can record and run macros in it:

File

1. On the File tab, choose Save As.
2. In the Save As dialog box, open the Save As Type drop-down list and choose the macro-enable option.
3. Click the Save button.

### Ground rules for recording macros

Before you record a macro, observe these ground rules:

- ◆ Plan ahead. If the actions you intend to record in the macro are complex, write them down beforehand so that you can execute the commands without making any mistakes.
- ◆ Set up the program the way it will be when you play back the macro. Before creating a macro that manipulates information in a worksheet, for example, open a worksheet that is typical of the kind of worksheet on which you'll run the macro. Unless you prepare yourself this way, you may have to pause the Macro Recorder (you can do that in Word) as you record, or you may have to edit the macro in the Visual Basic Editor later.

Avoid using the mouse as you record a macro (although you can use it to open menus and select menu commands). The Macro Recorder interprets some mouse actions ambiguously. Select data by using key presses. (In Excel, you can select cells with the mouse because the Macro Recorder is able to recognize cell addresses.)



When you visit a dialog box as part of recording your macro, take into account all the dialog box settings. For example, if you visit the Font dialog box and choose 12 points on the Font Size drop-down list, the Macro Recorder duly records the 12-point font size, but it also records the Times Roman font in the macro if Times Roman happens to be the font that is chosen in the Font dialog box. The moral: Take account of all the settings in a dialog box when you visit it while recording a macro.

In dialog boxes with tabs, you can't click tabs to switch from tab to tab and choose commands. Instead, click OK to close the dialog box, reopen it, click a different tab, choose a command on the tab, and close the dialog box again.



### 8. Click the Stop Recording button.

That's all she wrote — your macro is recorded. I suggest you test it to see how well it runs.

To delete a macro, click the Macros button on the Developer or View tab, and in the Macros dialog box, select the macro you want to delete and then click the Delete button.

## Running a Macro

Before you run a macro, take note of where the cursor is located. The macro may require the cursor to be in a certain place to run properly. Follow these steps to run a macro:



### 1. On the Developer or View tab, click the Macros button (or press Alt+F8).

The Macro dialog box, shown in Figure 6-5, appears.

### 2. Select the macro that you want to run.

Macros have cryptic names, but you can usually tell what they do by glancing at their descriptions.

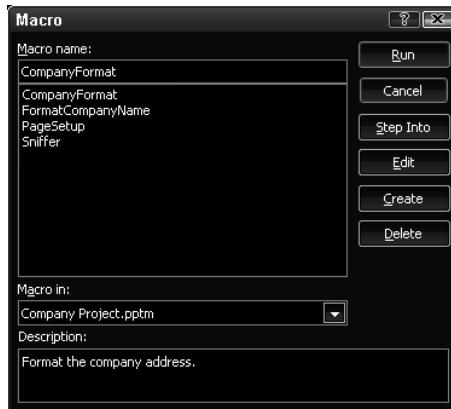
If you don't see the macro you want, make a new selection in the Macro In drop-down list.

### 3. Click the Run button.

## 716 Editing a Macro



If your macro is a long one and you need to stop it from running, press **Ctrl+Break**. (On most keyboards, the **Break** key is located along with the **Pause** key on the right side of the keyboard, to the right of the **F12** key.)



**Figure 6-5:**  
The Macro dialog box.

### *Editing a Macro*

Editing a macro entails opening the Visual Basic Editor and editing Visual Basic codes, which is not for the faint of heart. If your macro is an uncomplicated one, you're better off re-recording it. This book isn't a developer's guide, so it can't go into the details of using the Visual Basic Editor. However, the following pages explain the basics of reading a macro in the Visual Basic Editor, deleting parts of a macro, and editing the text in a macro.

Follow these steps to view a macro in the Visual Basic Editor:



- 1. On the Developer tab, click the Macros button (or press Alt+F8).**  
You see the Macro dialog box (refer to Figure 6-5).
- 2. Select the name of the macro that needs editing.**
- 3. Click the Edit button.**  
You see the Visual Basic window, as shown in Figure 6-6.
- 4. Choose File→Save (or press Ctrl+S) after you finish editing your macro.**

Macro names appear in the Procedure box on the right side of the window. Those computer codes in the Code window are scary, aren't they? You can find one line of code for each command in your macro. Edit computer codes the same way that you edit text in a Word document. For example, click to the left of a line to select it and then press **Delete** to delete a line. Or type in the Code window to add commands or change the text that the macro enters in documents.

- ◆ **All dialog box options are recorded:** Even if you select only a single option in a dialog box, the macro records all the options in the dialog box. A visit to the Font dialog box, for example, adds more than 20 lines to a macro, one for every option in the dialog box. However, you can edit out lines that your macro does not require.

### ***Editing the text that a macro enters***

As I mention earlier, text that is typed during a macro procedure is enclosed in double quotation marks ("") in the Code window. To edit the text in a macro, you can edit the text between double quotation marks in the Code window. Edit this text as though you were editing it in Word.

### ***Deleting parts of a macro***

Delete part of a macro when you want to remove a command or command sequence. For that matter, you may delete parts of a macro if they are unnecessary. Deleting unnecessary lines makes a macro easier to read and run faster. As I mention in the preceding section of this chapter, a visit to a dialog box, such as the Font dialog box, adds many lines to a macro, most of which are unnecessary. Your macro requires only the lines that pertain to changing settings.

To delete part of a macro, delete the lines as though they were text in a Word document: Click or click and drag in the left margin and then press the Delete key.

## ***Running a Macro from a Button on the Quick Access Toolbar***

Any macro that you run often is a candidate for the Quick Access toolbar. As Chapter 1 of this mini-book explains, you can place your own buttons on the Quick Access toolbar and move the toolbar below the Ribbon as well. Follow these steps to assign a macro to a button and place the button on the Quick Access toolbar:

1. **Right-click any button or tab and choose Customize Quick Access Toolbar on the shortcut menu.**

You see the Quick Access Toolbar category of the Options dialog box.

2. **In the Choose Commands From drop-down list, choose Macros (you can find it near the top of the list).**

The cryptic names of macros in your file appear in the dialog box.

# Chapter 7: Linking and Embedding in Compound Files

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## *In This Chapter*

- ✓ Understanding what object linking and embedding (OLE) is
- ✓ Linking to foreign data in another file
- ✓ Embedding foreign data in a file

**A** compound file is a computer file that brings together data created in different programs. A year-end report is a classic example of a compound file. Typically, a year-end report includes word-processed text, worksheet tables, and graphics. Thanks to object linking and embedding (OLE), you can create compound files. They can include data from different sources — Excel worksheets, Word text, or Paint graphic files. What's better, you can copy and continuously update material from other programs without leaving the Office 2010 program you're working in.

All this magic is accomplished with something called object linking and embedding (OLE). This chapter explains OLE, tells you how to embed data from another file, and explains how to link data from another file so that your files are updated automatically.

By the way, OLE is pronounced the same as *olé* (“oh-lay”), which is the word that the bullfighting audience shouts when the bull passes under the matador’s cape. *¡Loco, verdad?*

## *What Is OLE, Anyway?*

*Object linking and embedding* (OLE) is a means of putting more than one program to work on the same file. You can think of OLE as a high-powered version of the standby Copy and Paste commands. As you probably know, the Copy and Paste commands are for copying material from one place or program to another. For example, with the Copy and Paste commands, you can copy text from an Excel worksheet into a Word document. You can copy columns and rows from a Word table and paste them straight into a PowerPoint table.

### *Uses for embedding*

Embedding enables you to work inside an Office program on data that the program isn't equipped to handle or display. Embed an Excel worksheet in a Word document if you want to have a table with complex mathematical formulas. Embed a Word document in an Excel worksheet if you want to write paragraphs of explanatory text and be able to call upon Word formatting commands. Consider embedding an object if you want to attempt something that you can't normally do in the program you're working in.

### *Pitfalls of linking and embedding*

Linking and embedding aren't for everybody. Here are some OLE pitfalls:

- ◆ **File size:** Including embedded objects in a file makes the file grow in size — and I mean really grow. A large file can be unwieldy and hard to store. It takes longer to load on-screen. By linking, you solve the file-size problem because the item has to be stored only once — in its original location.
- ◆ **Carrying charges:** Links are broken if you move your file or you or someone else moves a file to which your file is linked. A file with links can't be sent over the Internet or copied to a laptop without the links being broken. Linking is out of the question in the case of files that travel to other computers. If you link to files over a network, establish a scheme for storing files with your co-workers so that files aren't moved inadvertently.
- ◆ **Formatting embedded and linked objects:** Unfortunately, linked and embedded objects are often hard to format. Selecting the same fonts and colors as the fonts and colors in your file can be difficult because you have to rely on the commands in the source file to do the formatting. The end result is that linked and embedded objects sometimes look out of place.

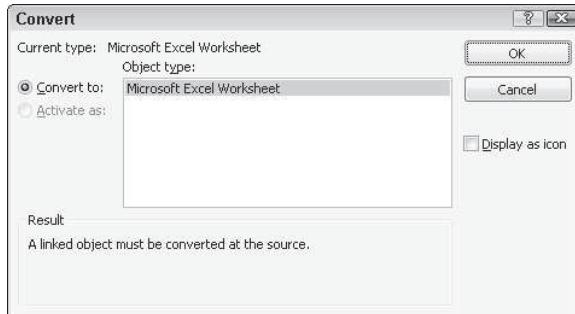


Before you undertake any activity regarding object linking and embedding, save the file you're working on. The program with which you're working needs to know precisely where OLE objects go in order to execute OLE commands. Therefore, your file must be completely up-to-date for OLE commands to work.

### *Linking to Data in a Source File*

Link a slide, document, or worksheet to another file so that changes made to the other file are made automatically to your slide, document, or worksheet. Earlier in this chapter, "Uses for linking" explains the benefits of linking to another file. These pages explain how to establish the link between your files, how to update the link, how to break a link, and how to mend broken links.

**Figure 7-3:**  
Converting a  
linked to an  
embedded  
object.



## Embedding Data from Other Programs

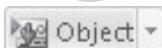
By embedding data, you can enter and edit foreign data without leaving the program you're working in. An Excel worksheet, for example, can be embedded on a PowerPoint slide (refer to Figure 7-1). When you double-click the embedded object, the computer program with which it was created opens so that you can start editing.

### Embedding foreign data

How you embed data that is foreign to the program you're working in depends on whether the data has already been created. You can get a head start embedding data if you or someone else has already created it. Following are instructions for embedding an object so that you can enter the data on your own and embedding data that has already been created.

#### Creating an embedded object from scratch

Create an embedded object from scratch if the data you need hasn't been created yet. Follow these steps:



##### 1. Go to the Insert tab.

If your aim is to create an Excel table, click the Table button, choose Excel Spreadsheet, and be done with it.

##### 2. Click the Object button.

You see the Object (or Insert Object) dialog box, as shown on the left side of Figure 7-4.

##### 3. Click the Create New option tab (or option button).

##### 4. In the Object Type list, choose the name of the program that handles the kind of data you want to embed.

For example, to insert a space for Word text, choose Microsoft Word Document.

# *Chapter 8: Office Web Apps*

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## *In This Chapter*

- ✓ **Understanding how online applications work**
- ✓ **Understanding how the Office Web Apps work**
- ✓ **Signing up with Windows Live**
- ✓ **Going to the SkyDrive window**
- ✓ **Handling SkyDrive folders and files**
- ✓ **Working on Office Web App files**
- ✓ **Collaborating on and sharing files with others**

**T**his chapter looks into Office Web Apps, the online versions of Word, Excel, PowerPoint, and OneNote. Respectively, these applications are called Word Web App, Excel Web App, PowerPoint Web App, and OneNote Web App. Anyone can use these applications. You don't have to install Office 2010 or pay a fee of any kind. All you need is an Internet connection and an account with Windows Live. Moreover, users of the Office Web Apps can collaborate online with one another to create Word documents, Excel worksheets, PowerPoint presentations, and OneNote notebooks. As long as both of you are connected to the Internet, you and a colleague can work together on the same file simultaneously, even if one of you is in the Buganda Kingdom and the other is in Uzbekistan.

## *Introducing Online Applications*

The notion of using online applications takes some getting used to, but like it or not, you'll have to get used to it because soon the majority of applications will be online applications. These pages explain how online applications work and the advantages and disadvantages of using Office Web Apps and other online applications.

### *A new concept*

Here's a computing concept that's in your future: In the years ahead, the personal computer as we know it will become obsolete and most computing activity will take place over the Internet. Rather than store files on the hard drive of your computer, you will store files on a Web server on the Internet. Rather than install and run programs on your computer, you will run programs that someone else installed for you on a Web server. To work on a file, you'll take these steps:

## *Office Web Apps: The Big Picture*

To use Office Web Apps, start by setting up an account with Windows Live, a Microsoft Web site that offers Web-based applications and services. One of the services is called SkyDrive. Use it to create, store, and share Office Web App files. Windows Live (and SkyDrive) cost nothing to use. (See “Getting Ready to Use the Office Web Apps,” later in this chapter.)

In SkyDrive, you can create folders for storing files online. You can also upload files from your computer to SkyDrive and download files from SkyDrive to your computer. (See “Managing SkyDrive Folders” and “Managing Your Files on SkyDrive.”)

To create a document, worksheet, presentation, or notebook with an Office Web App, either start in a SkyDrive folder and choose the New command, or start on the File tab in Word, Excel, PowerPoint, or OneNote and choose Save & Send→Save to Web. (See “Creating an Office Web App file.”)

The Office Web Apps — Word Web App, Excel Web App, PowerPoint Web App, and OneNote Web App — are abridged versions of their Office 2010 namesakes. Use the commands on the Ribbon and the tabs to create and perfect your document, worksheet, presentation, or notebook. To make use of a command in an Office program that isn’t found in an Office Web App, click the Open In button (the rightmost button on the Ribbon). (See “Editing an Office Web App file,” later in this chapter.”)

To see how to use SkyDrive to collaborate online with other people, establish permissions for sharing folders, and issue invitations to your co-workers so that they can work alongside you in cyberspace, see “Sharing and Co-Authoring Files,” later in this chapter.

### **SharePoint 2010: The other way to use the Office Web Apps**

In this book, I describe how to run the Office Web Apps from a server located at Windows Live, a Microsoft Web site, but you can also run Office Web Apps without keeping your files at Windows Live. Using a software product called SharePoint 2010, you can run the Office Web Apps from a server on a local network. For example, you can run the applications from and store your files on a server that is owned and operated by the company you work for.

Keeping files on a network server close to home helps solve the privacy problem. Meddlers and spies who want to steal files have a harder time getting them from a server on a closed network than they do getting them from a Windows Live server on the Internet. To install a SharePoint 2010, however, you need a fair amount of technical expertise. If SharePoint 2010 interests you, see *SharePoint 2010 For Dummies*, by Vanessa L. Williams.

## **Getting Ready to Use the Office Web Apps**

To start using the Office Web Apps, complete these tasks:

### **1. Make sure you have the right Web browser.**

The Office Web Apps work with Internet Explorer, Firefox, and Safari, but not the Chrome or Opera browser. For all occasions, I recommend using Firefox, and you can download and install it starting at this address:

[www.mozilla.com/firefox](http://www.mozilla.com/firefox)

### **2. Install Microsoft Silverlight.**

Silverlight is an application that improves the delivery of media over the Internet. Installing Silverlight isn't mandatory, but Microsoft recommends it because the Office Web Apps work better and faster when Silverlight is installed. To download and install Silverlight, go to this address:

[www.silverlight.net](http://www.silverlight.net)

### **3. Sign up with Windows Live.**

Go to the address listed here to sign up. You are asked to provide your e-mail address and a password. If you have an account with Hotmail, the online e-mailing service, you can use your Hotmail address and password to sign into Windows Live. To sign up, you can create a Windows Live ID or use your e-mail address.

<http://home.live.com>

## ***Signing In and Going to the SkyDrive Window***

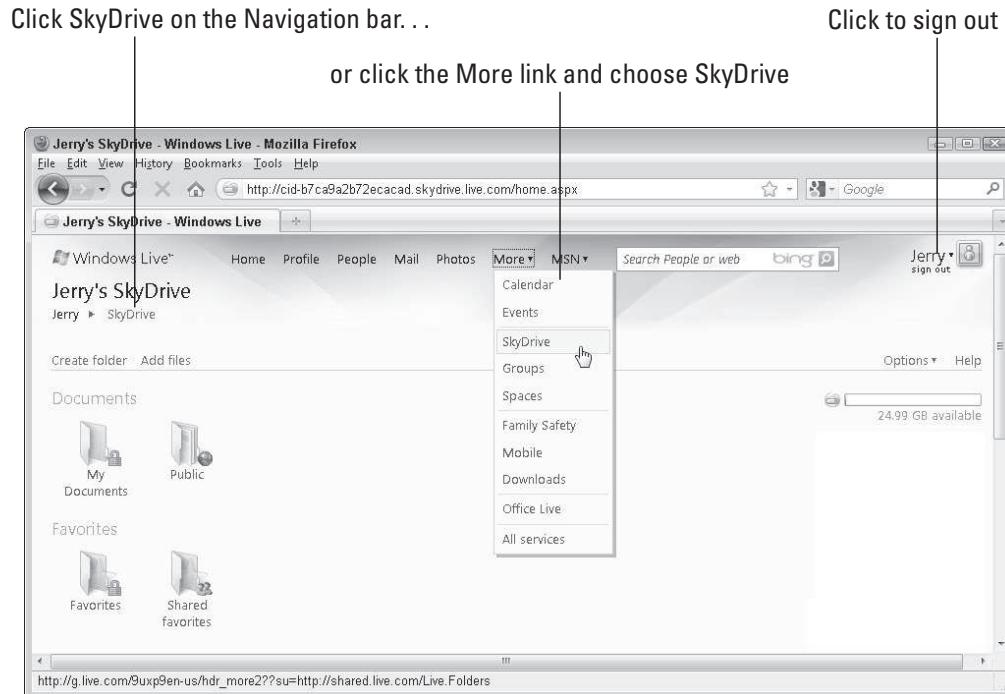
Sign in to Windows Live by going to the address shown here, entering your ID and password, and clicking the Sign In button:

<http://home.live.com>

The Home window at Windows Live opens, which is fine and dandy, but to use the Office Web Apps, you need to be on the SkyDrive window. As shown in Figure 8-2, you can use these techniques to get to the SkyDrive window:

- ◆ Click the More link on the Windows Live taskbar and choose SkyDrive on the drop-down list.
- ◆ Click SkyDrive on the Navigation bar (see Figure 8-2).

The SkyDrive window lists your folders and how much space the files in your folders occupy. (You can store up to 25GB of files.) To see all your folders rather than the ones you most recently opened, click the All Folders or View All link.



**Figure 8-2:**  
Going to the  
SkyDrive  
window at  
Windows  
Live.



When the time comes to sign out of Windows Live, click the Sign Out link in the upper-right corner of the screen.

## Managing SkyDrive Folders

The SkyDrive window at Windows Live lists your top-level folders. Click a folder icon in the SkyDrive window to open a folder. Starting in the SkyDrive window, you can create folders, rename folders, and delete folders, as the following pages explain.

### Creating a folder

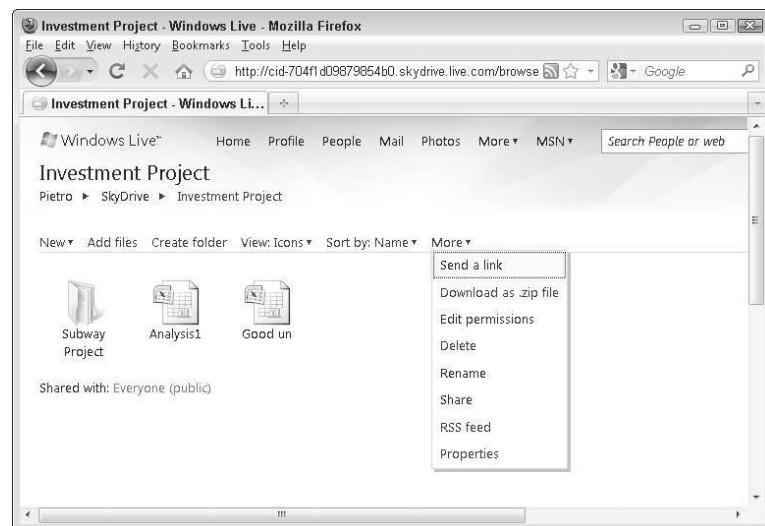
SkyDrive gives you two folders for storing files. These folders are called My Documents and Public. (The Favorites folders are for storing shortcuts to Web sites.) Follow these steps to create a folder of your own:

**1. In the SkyDrive window, click the Create Folder link.**

The Create a Folder window opens. If you want to create a subfolder (a folder inside another folder), open the parent folder before completing Step 1.

**2. In the Name box, enter a descriptive name for the folder.**

You can't rename or delete a folder if you don't have permission to do so. For more information, see "Choosing Share With permissions," later in this chapter.



**Figure 8-3:**  
A folder window.

## Creating and Editing Office Web App Files

To create a file with Word Web App, Excel Web App, PowerPoint Web App, or OneNote Web App, start by opening the folder where you want to keep the file. These pages explain how to create Office Web App files as well as how to open them, edit them, and find your way around the File window.

### Creating an Office Web App file

I'm happy to report that creating an Office Web App file is quite easy. After signing in to Windows Live and going to the SkyDrive window, follow these steps to create an Office Web App file:

1. **Open the folder where you will keep the file.**

See "Creating a folder," earlier in this chapter, if you need to create the folder or subfolder first.

2. **Click the New link and choose an option on the drop-down list, as shown in Figure 8-4.**

The Word Web App, Excel Web App, PowerPoint Web App, or OneNote Web App opens so that you can create your worksheet, presentation, document, or notebook.

## Managing Your Files on SkyDrive

SkyDrive is first and foremost a means of organizing and managing files. You can take advantage of commands in a SkyDrive folder window to upload files to SkyDrive, download files from SkyDrive, and delete, rename, move, and copy files.

### Uploading files to SkyDrive

To upload files from your computer to a folder you keep on SkyDrive, you can start in SkyDrive or in Word, Excel, PowerPoint, or OneNote:

- ◆ **Starting in SkyDrive:** Open the folder where you want to store the files and click the Add Files link. The Add Files window appears. Click a Browse button for each file you want to upload, choose a file in the File Upload dialog box, and click the Open button. Then Click the Upload button.
- ◆ **Starting in Word, Excel, PowerPoint, or OneNote:** With the file you want to upload to SkyDrive open, follow these steps to upload the file to SkyDrive:
  1. On the File tab, choose Save & Send, and choose Save to Web. Save to Windows Live options appear.
  2. Click the Sign In button, enter your Windows Live ID and password, and click OK. A list of folders you keep on Windows Live appears.
  3. Select a folder and click the Save As button.

Later in this chapter, “Downloading files from SkyDrive to your computer” explains how to do move files in the other direction — from SkyDrive to your computer.

### Moving, copying, renaming, and deleting files

Starting in a File window (refer to Figure 8-5), use these techniques to move, copy, rename, or delete a file:

- ◆ **Moving and copying:** Click the Move link or click the More link and choose Copy on the drop-down list. You see a window that lists your SkyDrive folders. Select a folder name and choose the Move or Copy command.
- ◆ **Renaming:** Click the More link and choose Rename on the drop-down list. Then enter a name in the New Name text box and click the Save button.
- ◆ **Deleting:** Click the Delete link and then click OK in the confirmation dialog box.

### Downloading files from SkyDrive to your computer

SkyDrive gives you the choice of downloading files one at a time or downloading all the files in a folder in a zip file:

- ◆ **Downloading a file:** In the File window (refer to Figure 8-5), click the Download link. You see the standard dialog box for downloading files from the Internet. Choose to open or save the file after you download it and click OK.
- ◆ **Downloading all the files in a folder:** In a Folder window (refer to Figure 8-3), click the More link and choose Download as .Zip File on the drop-down list. In the standard dialog box for downloading files, choose to open or save the file after you download it and click OK.

### Sharing and Co-Authoring Files

As I mention at the start of this chapter, one of the great advantages of Office Web Apps is being able to share files with others. Microsoft uses the term *co-authoring* to describe what happens when more than one person works on a file in an Office Web App. As long as all parties have Windows Live accounts and all have permission to edit a file, they can edit it. These pages explain how to handle editing permissions, how to invite others to co-author a file, and what being invited to co-author a file entails.

### Choosing Share With permissions

Whether others can open a folder on your SkyDrive page and view its files depends on which permissions the folder has been granted. Likewise, permissions determine whether others can add files to a folder, edit files, and delete files.

#### Types of permissions

If you intend to share files with others on Windows Live, you need to know how folder permissions work. Folder permissions fall into two broad categories:



- ◆ **Private folders:** Only the owner can open a private folder, view its files, add files, edit files, and delete files. The default My Documents folder is a private folder.
- ◆ **Public folders:** Everyone whom the owner invites to visit a public folder can visit it. The default Public folder that SkyDrive creates for you is an example of this type of folder. When others come to a public folder, they can do these tasks, depending (again) on which permissions the owner has given them:
  - *Public folder for viewing files only:* Visitors can open and view the files in the folder (but not edit or delete the files).

