



Advanced Microsoft® Office Documents 2007 Edition Inside Out

Stephanie Krieger

To learn more about this book, visit Microsoft Learning at
<http://www.microsoft.com/MSPress/books/9491.aspx>

9780735622852
Publication Date: March 2007

Microsoft®
Press

Table of Contents

Acknowledgments	xvii
About the CD	xix
Conventions and Features Used in This Book	xxi
Introduction	xxiii

Part 1 Document Essentials

Chapter 1	Introducing the 2007 Microsoft Office System.....	3
	Redefining Documents for Today's Business Demands.....	3
	Creating Documents Across the Office System	4
	What's New for Your Documents in the 2007 Office Suite	4
	Word, Excel, and PowerPoint.....	5
	Word	7
	Excel.....	8
	PowerPoint.....	10
	Introducing the Office Open XML File Formats	11
	The File Types.....	11
	Choosing Your Format	11
	What Else Do I Need to Know About These File Formats?.....	12
	The New User Interface: Ribbons and Then Some.....	12
	Getting Comfortable in Your Workspace.....	14
	The Quick Access Toolbar	14
	The Customizable Status Bar.....	14
	The Mini Toolbar	15
	New Keyboard Options	15
	Documents 101: Understanding How the Office Programs "Think".....	16
	The Benefits of Being Lazy.....	17
	Less Work In = Better Results Out	17
	Using the 2007 Office Suite Effectively: Never Do the Same Work Twice.....	20

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

www.microsoft.com/learning/booksurvey/

Chapter 2	Understanding Electronic Documents	23
	Differences to Consider When Sharing Documents Electronically	23
	Document Construction	23
	Document Content	27
	Securing the Private Information in Your Documents	27
	The Simple Truth About Document Metadata and Hidden Content	27
	Options for Managing Hidden Data in the 2007 Office System	28
	Securing Documents	34
	Restricting Permission to Your Documents	35
	Protecting Documents from Editing	36
	Signing Documents and Using the Trust Center	38
Chapter 3	Collaborating and Sharing with Others	39
	Understanding and Using the 2007 Office System Collaboration Environments	39
	Creating and Using Shared Workspaces with Windows SharePoint Services	41
	Understanding the Workspace	41
	Accessing or Adding Content in a WSS Document Library	43
	Creating or Editing a WSS Shared Workspace	45
	Creating and Using Groove Workspaces	47
	Understanding Your Workspace	47
	Creating a Workspace	48
	Inviting Others to Join a Workspace	49
	Using Office OneNote 2007 as a Collaboration Tool	50
	Shared Notebooks and Live Sharing Sessions	50
 Part 2 Word		
Chapter 4	Building Easy-to-Manage, Robust Documents	55
	Staying in Control: Be the Boss of Your Documents	57
	The Three Levels of Word Formatting	57
	Understanding Objects and Stories	60
	Finding the Simple Approach to Any Task	61
	Document Logic: Bringing Yourself to the Document	62
	Working with Formatting Marks	62
	Using Views Effectively	64
	Monitoring the Health of Your Document	65
	What Is Document Corruption?	65
	Using Open And Repair	67
	The Five Tools You Need to Create Any Word Document	68
Chapter 5	Styles	71
	Chapter Assumptions	71
	What's New for Styles in Word 2007	71
	Paragraph and Character Quick Styles	72
	The Styles Pane	74
	Creating Effective Style Sets	75
	Consider Built-In vs. Custom Styles	76

	Benefits of Using Character Styles	78
	Making Effective Use of Base and Following Styles	79
	Understanding Linked Styles	83
	Styles That Make User-Friendly Documents	84
	Using Quick Style Sets	85
	Working with Themes	86
	The Style–Theme Relationship	88
	Making Your Documents Theme-Ready	90
	Customizing Themes	90
	Sharing Themes	91
	Mastering Lists	93
	What’s New for Single-Level Lists	93
	Differentiating List Styles and Multilevel Lists	95
	Creating and Using List Styles	96
	Sharing Lists Between Documents and Templates	100
	Working with Table Styles	101
	Creating Table Styles	102
	Setting a Default Table Style	103
	Managing Styles	103
	The Wonderful New World of the Manage Styles Dialog Box	103
	Introducing The Style Inspector	105
Chapter 6	Tables	107
	Chapter Assumptions	107
	What’s New for Tables in Word 2007	108
	The Great Document Organizer	109
	Key Practices for Creating Tables That Work	110
	Choosing Between Paragraph Formatting and Table Formatting	111
	Using Table Properties to Simplify Table Setup	118
	What You Need to Know About AutoFit	120
	Using Tables to Create Page Layout	122
	Creating an Effective Host Table	123
	Using Nested Tables vs. Text Wrap Around Tables	125
	Managing Nested Tables	128
	Formatting Financial Tables	129
	Decimally Align Numbers and Currency Symbols	132
	Managing Tables from Other Sources	135
	Considerations for Tables That Originate in Excel	135
	Considerations for Tables That Originate on the Web	136
Chapter 7	Managing Graphics	137
	Chapter Assumptions	137
	What’s New for Graphics in Office Word 2007	138
	Using the Best Program for the Graphic Task	139
	Objects vs. Pictures	142
	Linked and Embedded Objects	142
	Converting Embedded or Linked Objects to Pictures	145

Editing Linked and Embedded Objects	147
Determining the Best Picture Type for Your Graphic	148
Graphic Layout Simplified.	151
Using the In Line With Text Layout	152
Using Table Cells as Graphic Placeholders	155
Formatting Pictures.	156
Using Text Boxes.	159

Chapter 8 **Sections 161**

Chapter Assumptions.	161
What's New For Section Formatting in Word 2007	161
Are You Sure You Need a Section Break?	165
Formatting Changes That Require a Section Break.	165
When Not to Use a Section Break	166
Keeping Sections Simple.	168
Understanding How Section Formatting Is Stored	169
Understanding Section Break Types	171
Using Headers and Footers	173
Managing Different First Page and Different Odd & Even Headers and Footers	176
Understanding Link To Previous.	178
Simplifying Book-Style Page Layout	179
Creating Watermarks	181

Chapter 9 **Quick Parts 185**

Chapter Assumptions.	185
Understanding Building Blocks: The Evolution of Documents.	186
Creating Your Own Building Blocks	189
Inserting Building Block Entries	192
Managing Building Blocks	195
Document Property Quick Parts	197
Working with Fields	199
Understanding Field Construction	200
Creating Fields	201
Editing Fields	206
Nesting Fields.	207

Chapter 10 **Reference Tables and Tools 209**

Chapter Assumptions.	209
What's New for Reference Tools in Word 2007	210
Editing Reference Fields	211
Managing Tables of Contents	212
Using TC Entry Fields	215
Creating Multiple Tables of Contents in One Document	217
Creating a Table of Figures	219
Working with Indexes	220
Using Index Entry Fields.	221
Marking an Index.	221

	Creating an Index from an AutoMark File	222
	Creating a Bibliography.	223
	Creating and Managing Sources.	223
	Working with Citations.	224
	Creating a Bibliography	225
	A Footnote About Footnotes and Endnotes	226
Chapter 11	Content Controls: Creating Forms and Then Some	229
	Chapter Assumptions.	229
	Working with Content Controls.	230
	Types of Content Controls	231
	Built-In Features That Use Content Controls	232
	Using Content Controls	232
	Creating Controls.	233
	Formatting Controls and Editing Properties.	234
	Nesting Controls	240
	Understanding Document Protection Options.	240
	Content Controls and Automation	242
Chapter 12	Planning Your Documents	245
	Chapter Assumptions.	245
	Design Considerations.	246
	How Will Your Document Be Delivered?.	246
	Focus On the Content.	248
	Making the Right Statement About You and Your Business	249
	Content Planning	250
	Making Choices About Content	250
	Using Layout and Design to Organize Your Content	251
	Using OneNote for Document Planning and Outlines	252
	Setting Up a OneNote Outline	253
	From OneNote Page to Word Document Without Hardly Typing	256
	When Should a Document Live in OneNote?.	257
	Other Document Assists from OneNote.	259

Part 3 Excel

Chapter 13	Data-Based Documents: Formatting and Managing Worksheets	263
	Chapter Assumptions.	263
	What's New for Worksheets in Excel 2007.	264
	When Your Document Lives in Excel.	266
	Streamlining Worksheet Formatting.	267
	Working with Themes in Excel	269
	Using Cell Styles.	271
	Formatting Ranges as Tables.	275
	Increasing Your Options with Conditional Formatting	278
	Managing Page Layout Effectively.	281
	Treat Your Workbooks Like the Documents They Are.	285

Chapter 14	Working with Data	287
	Chapter Assumptions	287
	What's New for Number Crunching in Excel 2007	288
	Using Tables as a Data Tool	290
	Creating Formulas—Working with Functions	294
	If There's Logic to It, Excel Functions Can Do It	294
	Nesting Formulas	296
	Defining Names and Using Structured References	297
	Managing Formulas	302
	Simplifying Data Organization	305
	When You Need to Use External Data	309
Chapter 15	Charts	313
	Chapter Assumptions	313
	What's New for Charts in Excel 2007	314
	The New Essentials for Creating Charts	315
	Fighter-Pilot Cool Chart Formatting	317
	Using Chart Quick Styles	317
	Customizing Chart Elements	319
	Combining Chart Types	328
	Using Secondary Axes	328
	Adding Drawing Objects to Charts	330
	Timesaving Techniques for Adding or Editing Chart Data	332
	Reorder Data Series and Set Data Display Options	334
	Creating Advanced Chart Types	335
	Bubble Charts	335
	Price/Volume Charts	337
	Creating Charts for Use in Other Programs	342
	Resizing Charts	342
	Getting Your Chart into Word	343
	Getting Your Chart into PowerPoint	344
Chapter 16	Powerful Reporting, Easier Than You Think: A PivotTable Primer	345
	Why Use a PivotTable?	346
	Creating a PivotTable	346
	Setting Up Your Data	346
	Creating the Table	347
	Understanding PivotTable Field Areas	353
	Managing PivotTables	355
	Field Settings	355
	Table Options	360
	Formatting PivotTables	360
	Using PivotCharts	360
	Creating and Using a PivotChart	362
	Managing the Connection Between PivotTable and PivotChart	363
	Quick Reference—Create and Format a PivotTable	363

Chapter 17	The Excel–Visio Connection	365
	Visio Essentials—A Quick Reference Overview	366
	Creating a Diagram	366
	Working with Shapes	368
	Using Connectors	373
	Formatting Pages	374
	Creating a Visio Organization Chart from Worksheet Data	375
	Creating a PivotDiagram	377
	Generating a PivotDiagram	377
	Formatting and Managing a PivotDiagram	379
	Using Shape Data and Data Graphics	382
	Creating Shape Data	382
	Generating a Data Report	384
	Linking Data to Shapes	384
	Creating and Managing Data Graphics	386
	More Visio Data Connections	387

Part 4 PowerPoint

Chapter 18	Creating Professional Presentation Graphics	391
	Chapter Assumptions	393
	What’s New for Presentation Graphics in PowerPoint 2007?	393
	Determining the Best Diagram for Your Content	396
	Making Smart Choices with SmartArt	398
	Creating a SmartArt Diagram	398
	Selecting a Diagram Layout	399
	Understanding and Using SmartArt Styles and Formatting	403
	Editing SmartArt Diagram Content	407
	Using Drawing Tools to Their Fullest	412
	“Perfect” Is Easier than “Close Enough”	412
	Managing Shapes with the Selection And Visibility Pane	415
	Formatting Shapes Effectively	417
	Using the Size And Position Options	423
	Organize Content Precisely with the Arrange Tools	424
	Using Drawing Guides	427
	Editing Shapes	430
	Changing Shapes	430
	Edit Points to Create Virtually Anything	432
	WordArt as a Powerful Design Tool	434
	Ungrouping Clip Art to Create Custom Graphics	436
	Getting Your Graphic into Other Programs	438
Chapter 19	Slides and Presentations	441
	Chapter Assumptions	441
	What’s New for Slide Presentations in PowerPoint 2007	442
	When Your Document Lives in PowerPoint	444
	Effective Document Setup	446

Control the Layout—Don't Let It Control You	446
Page Setup Considerations	448
Understanding Headers and Footers	451
Working with Masters, Layouts, and Designs	453
The New Master-Layout Relationship	454
Managing Masters and Layouts	454
Customizing Slide Masters	458
Customizing and Creating Slide Layouts	460
Creating Effective Slides and Layouts	462
Managing Slides and Slide Elements	464
A Note About Legacy Presentations	464
Working with Charts	464
Working with Text	465
PowerPoint Tables	470
Working with Embedded Objects	471
Managing Slides	473
Reusing Slides	475
The Themes—PowerPoint Connection	477
Why Create Themes in PowerPoint?	478
The Master—Theme Relationship	478
Setting a Default Theme	479
Putting on a Show—Slide Show Setup and Animation	479
Slide Show Setup	480
Animations and Transitions	482
Using Animation Effectively	484

Part 5 Templates, Automation, and Customization

Chapter 20	The Many Faces of Microsoft Office Templates	489
	Chapter Assumptions	490
	What's New for Templates in the 2007 Release	490
	What Type of Template Do You Need?	491
	Content Templates	493
	Design Templates	494
	Form Templates	495
	Feature-Specific Templates	497
	Differentiating Between Automated Templates, Global Templates, and Add-Ins	502
	Understanding Template Locations	503
	Considerations for Word Templates	504
	Considerations for Excel Templates	506
	Considerations for PowerPoint Templates	507
	Sharing Themes	508
	The Office 2007 Automation Story	509
Chapter 21	VBA Primer	511
	When and Why to Use VBA	512

Introduction to the VBA Language and Code Structure	513
Recording Macros	513
How to Read VBA Code	515
Statements, Procedures, Modules, and Projects	518
Understanding and Using the Visual Basic Editor	518
The Code Window	519
Project Explorer	519
The Properties Window	520
Setting Up Your Workspace	521
Writing, Editing, and Sharing Simple Macros	521
Creating Modules and Starting Procedures	522
Objects, Properties, and Methods	523
Object Models	524
Using Auto Lists	526
Variables	527
Constants	535
Collection Objects	537
Grouping Statements	539
Loops	542
Conditional Structures	547
Operators	549
Message Boxes and Input Boxes	550
Running One Macro from Another	554
Setting Macros to Conditionally Stop Executing Commands	555
Running Macros and Compiling Projects	556
Understanding Errors	558
Creating Error Handlers	560
Getting Help	563
Saving and Sharing Macros	563
Using VBA to Save Time on Document Production and Troubleshooting	565
Using the Immediate Window	565
Introduction to Using Events	567
Creating UserForms (Dialog Boxes)	570
Designing a UserForm	570
Automating a UserForm	574
Next Steps for Working with Automation in Microsoft Office	577
Chapter 22 Office Open XML Essentials	579
Chapter Assumptions	580
XML Basics for Reading Your Documents	580
Reading a Markup Language	581
Understanding Key Terms	583
XML Editing Options	583
Getting to Know the Office Open XML Formats	585
Breaking into Your Document	585
The Office Open XML File Structure	586
Taking a Closer Look at Key Document Parts	589
Building a Basic Word Document from Scratch	592

Editing and Managing Documents Through XML	599
Before You Begin Editing a Document Part	600
Editing Text and Formatting	600
Editing Pictures	607
Removing a Document Part	609
Customizing the Ribbon	610
The Basic Components of Ribbon Customization	611
Adding a Ribbon Tab	611
Add a Group to a Built-In Ribbon Tab	615
Binding Data to Content Controls	617
The Components of a Bound Content Control	618
Binding a Control to Custom XML	619
Next Steps for Working with the Office Open XML Formats	624
Chapter 23 Using VBA and XML Together to Create Add-Ins	627
Chapter Assumptions	627
Adding Your Macros to the Ribbon	628
Creating Simple Add-Ins for Word, Excel, or PowerPoint	631
Do You Need an Add-In?	633
Word: Global Templates	636
Excel Add-Ins	637
PowerPoint Add-Ins	637
Using the Trust Center	640
Understanding Digital Signatures	644
Next Steps	645
Index to Troubleshooting Topics	647
Index	651

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

www.microsoft.com/learning/booksurvey/