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Ed Bott

Award-winning technology author and journalist

Carl Siechert

Microsoft Office and Windows expert

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Office 2010

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See back

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Acquisitions Editor: Juliana Aldous

Developmental Editor: Devon Musgrave

Project Editor: Valerie Woolley

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*To Judy Bott and Jan Siechert,
for their patience, support, and love.*



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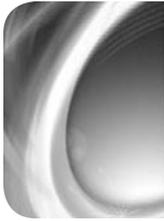


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Acknowledgments

Anyone who has written a book knows that it's a team effort and that surpassing a high quality bar sometimes takes longer than anyone expects. We've been blessed to work with a remarkably talented and patient team.

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Many, many thanks to all.

*Ed Bott and Carl Siechert
August 2010*

Book Support and Resources

Additional Resources

The authors have set up a website for readers of *Microsoft Office 2010 Inside Out* and *Windows 7 Inside Out*. At the site, you can find updates, corrections, links to other resources, and more useful tips. In addition, you can discuss Office 2010 and Windows 7 with the authors and with other readers. We hope you'll join us at w7io.com.

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Conventions and Features Used in This Book

This book uses special text and design conventions to help you find the information you need more easily.

Text Conventions

Convention	Meaning
Abbreviated commands for navigating the ribbon	For your convenience, this book uses abbreviated commands. For example, “Click Home, Insert, Insert Cells” means that you should click the Home tab on the ribbon, then click the Insert button, and finally click the Insert Cells command.
Boldface type	Boldface indicates text that you type.
Initial Capital Letters	The first letters of the names of tabs, dialog boxes, dialog box elements, and commands are capitalized. Example: the Save As dialog box.
<i>Italicized type</i>	<i>Italicized type</i> indicates new terms.
Plus sign (+) in text	Keyboard shortcuts are indicated by a plus sign (+) separating key names. For example, Ctrl+Alt+Delete means that you press the Ctrl, Alt, and Delete keys at the same time.

Design Conventions

INSIDE OUT

This Statement Illustrates an Example of an “Inside Out” Heading

These are the book’s signature tips. In these tips, you get the straight scoop on what’s going on with the software—inside information about why a feature works the way it does. You’ll also find handy workarounds to deal with software problems.

Sidebar

Sidebar provide helpful hints, timesaving tricks, or alternative procedures related to the task being discussed.

TROUBLESHOOTING

This statement illustrates an example of a “Troubleshooting” problem statement.

Look for these sidebars to find solutions to common problems you might encounter. Troubleshooting sidebars appear next to related information in the chapters. You can also use “Index to Troubleshooting Topics” at the back of the book to look up problems by topic.

Cross-references point you to locations in the book that offer additional information about the topic being discussed.

CAUTION!

Cautions identify potential problems that you should look out for when you’re completing a task or that you must address before you can complete a task.

Note

Notes offer additional information related to the task being discussed.

Working with Graphics and Pictures

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EFFECTIVE communication of ideas often requires much more than verbal skills. With Office 2010, you can easily add pictures and other types of graphics that make your documents more visually appealing while at the same time supplanting the proverbial thousand words.

We begin our exploration of the picture-handling capabilities of Office, naturally, with a picture. Figure 6-1 shows the Insert tab on the ribbon in PowerPoint. The Insert tabs in Word, Excel, and Outlook (and, to a lesser degree, OneNote) are quite similar, and this tab is the starting point in each program for adding graphics and pictures to a document.

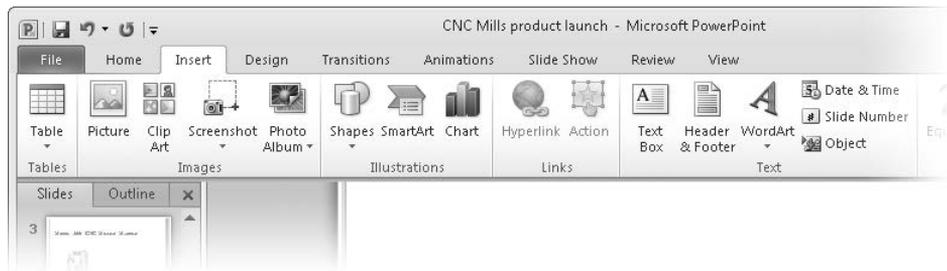


Figure 6-1 The Insert tab for each Office program has a few program-specific options (such as Photo Album in this example from PowerPoint), but most options are found in all Office programs.

In this chapter, we describe how to insert and modify each of the following types of graphical objects:

- **Picture** This option includes photographs, of course, but can also be used to insert a file saved in any of numerous picture file formats. (See “Inserting Pictures into Office Documents” on page 162.)

- **Clip Art** Clip art comprises photographs, illustrations, and even audio and video clips that are typically offered as part of a library of stock files from which you can choose. (See “Finding and Using Clip Art” on page 172.)
- **Screenshot** This option captures any open window (even those that are covered by other windows) or part of your screen and inserts it in your document. (See “Capturing and Inserting Screenshots” on page 174.)
- **Shapes** This option provides line illustrations in a wide variety of shapes that you can further customize. (See “Adding Shapes and Text Boxes” on page 175.)
- **SmartArt** SmartArt is a collection of templates for drawings, diagrams, flow charts, organizational charts, and so on. (See “Adding SmartArt to Documents” on page 180.)
- **Chart** Office supports a large number of ways to display numeric data as an image for easier interpretation and analysis. (See “Displaying Data Graphically with Charts” on page 179.)
- **Text Box** As you would expect, a text box holds text, which gives you greater flexibility in placement and formatting vis-à-vis surrounding text. (See “Adding Shapes and Text Boxes” on page 175.)
- **WordArt** WordArt provides a number of effects (such as skewing, stretching, rotating, shading, coloring, and distorting) that can be applied to text for use in logos, titles, and similar display purposes. (See “Applying Text Effects with WordArt” on page 182.)

Toward the end of the chapter we describe two other ways to apply art, colors, and shapes to your documents: ink (drawn with a stylus) and Office themes.

Working with Drawing Layers in Office Documents

Before we dive into the specifics of inserting pictures, shapes, SmartArt, and other graphical elements, it helps to understand how Office manages those objects. In this section, we explain the concept of layers in Office documents, how to select graphical elements, and how to manipulate those graphics in ways that are common to all Office programs.

Although the finished product from Office is two-dimensional—whether it’s printed on a sheet of paper or displayed on a flat-screen monitor—a graphics-laden document has a layer for each graphic, arranged in a virtual three-dimensional stack. It’s as though you took a blank sheet of paper, wrote some text on it, and then started laying printed photographs and graphics clipped from a magazine atop the sheet. You’d soon have a stack of clippings, with some obscuring part or all of the ones behind them.

In Word and Outlook you can, in effect, peel the text off the page and lay it in front of the stack of graphics. PowerPoint can also place a slide's text in front of the stacked graphics, but the implementation is slightly different; in PowerPoint, slide text (with a transparent background) is itself stored in a placeholder (a type of graphics container), so placing the text in front of other graphics is simply a matter of bringing that layer to the front. Graphics in Excel always remain in front of text and numbers in cells, so you need to be sure that you move your graphics to a place where they don't cover important data.

Selecting Graphics and Pictures

To work with a graphic or picture after it is placed in a document—whether you want to move it, resize it, adjust its colors, or whatever—you must select it. The simplest way to select an object is to click it. A selected object is shown with a frame, as you can see in Figure 6-2.

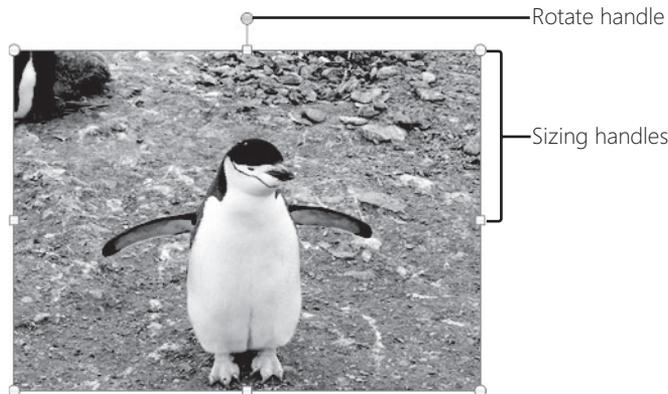


Figure 6-2 A selected picture or graphic has a frame with handles.

Selecting Text Boxes and WordArt

When you click a text box or a WordArt object, the frame initially appears as a dashed line, as shown in Figure 6-3. With the frame in this state, you'll also notice the appearance of an insertion point or a text selection, for this is the way you edit the text in such objects. To work with the object itself rather than the text it contains, move the mouse pointer to the dashed line, where it changes to a four-headed arrow, and click. The insertion point or text selection disappears, and the frame becomes a solid line. To return to text editing, click the text inside the frame. Alternatively, once an object is selected, you can toggle between text selection and object selection by pressing Enter and Esc. Table 6-1 shows other keyboard shortcuts for selecting objects.



Figure 6-3 To select a text object with a dashed frame, point to the frame and click.

Table 6-1 Keyboard Shortcuts for Selecting Graphics and Pictures

Action	Keyboard Shortcut
Select an object when another object is selected	Tab or Shift+Tab
Select all objects	Ctrl+A
Open the Selection And Visibility pane	Alt+F10
Selecting Text in WordArt and Text Boxes	
Select an object when text in the object is selected	Esc
Select text when the object is selected	Enter

Working with Multiple Graphics and Pictures

Selecting objects becomes more complicated when your document contains several objects, especially if they are stacked one in front of another. When objects are stacked, clicking selects only the front-most one. If objects further back are not completely covered, you can click an uncovered part to select that object. Alternatively, after you select an object, you can press Tab to cycle the selection through the objects back to front (or Shift+Tab to cycle from front to back).

A complex document with many graphics and pictures becomes much easier to manage when you use the Selection And Visibility pane (see Figure 6-4), which you can display in any of the following ways:

- On the Home tab, in the Editing group, click Select, Selection Pane.
- If an object is already selected, under Picture Tools or Drawing Tools, click the Format tab. Then, in the Arrange group, click Selection Pane.
- Press Alt+F10.

The Selection And Visibility pane lists all objects on the current page, worksheet, or slide. To select an object, simply click its name.

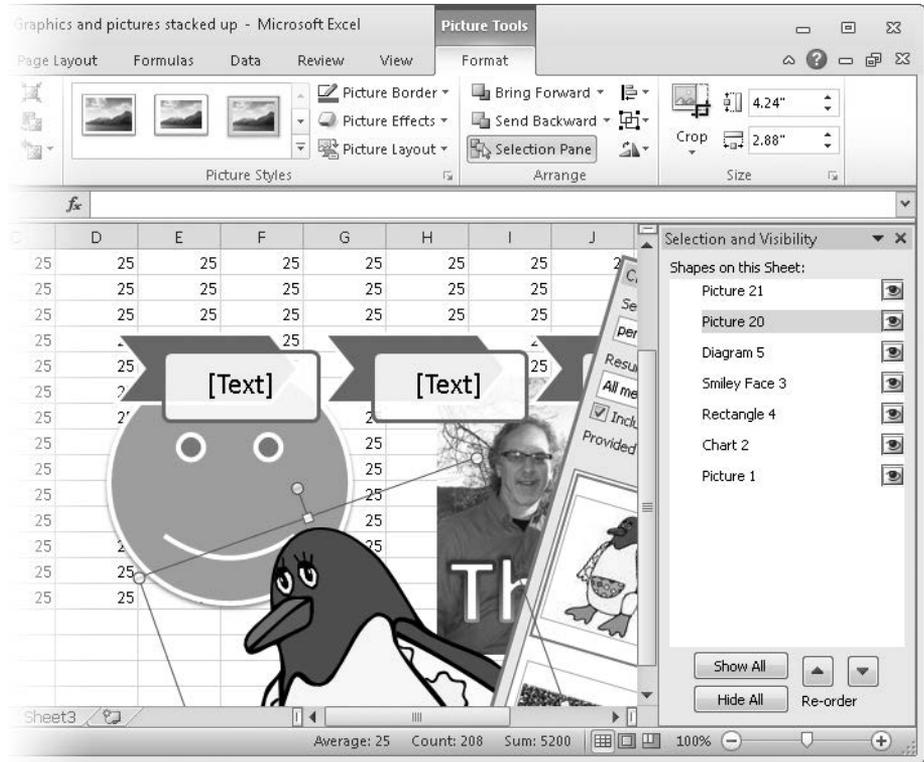


Figure 6-4 The Selection And Visibility pane, shown on the right side of this cluttered screen, lets you select individual objects—no matter how deeply they’re buried.

The default object names aren’t particularly helpful in determining which object is which, so in a document with many objects that you manipulate often, you might want to take the time to give each object a more meaningful name. To do so, click the object name, click it a second time to enter edit mode, and then type the new name.

The Selection And Visibility pane has another handy trick: the ability to hide objects. Click the icon to the right of an object’s name to hide it or to make it visible again. (Note that objects in Word with Wrap Text set to In Line With Text can’t be hidden.)

To select multiple objects, hold Ctrl as you click each one. This works whether you click the objects directly or click their names in the Selection And Visibility pane.

Positioning Objects

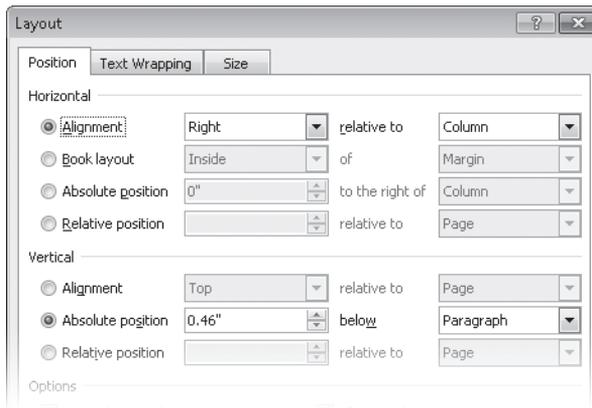
To move a selected object (or multiple selected objects), move the mouse pointer over the object until it becomes a four-headed arrow, and then drag. (For some types of objects, such as SmartArt, WordArt, or text boxes, you must point at the object's border frame. For other objects, you can point to any part of the object.)

Note

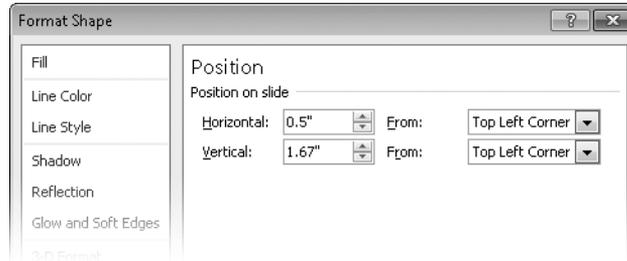
Word and Outlook support a positioning style called **In Line With Text**, which is not available in Excel or PowerPoint. Inline objects move as part of the text flow, and therefore can't be moved by dragging or using the Layout dialog box, described next. To position an object using these features, you must first select a different text wrapping style by right-clicking the object and choosing **Wrap Text**.

For more precise positioning, right-click the object and choose **Size And Position** (Word, PowerPoint, and Outlook) or **Size And Properties** (Excel). Then:

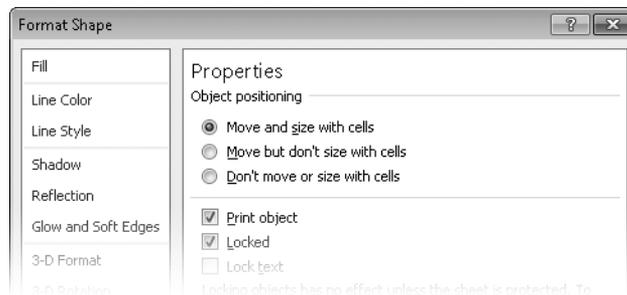
- In Word or Outlook, the Layout dialog box appears. Click the Position tab, where you'll find options for aligning the object with margins and other page landmarks as well as for specifying a precise location on a page. For details, see "Adding Pictures and Graphics" on page 237.



- In PowerPoint, the Format Shape dialog box appears. In the left pane, click **Position**, whereupon you'll see options for specifying the position relative to the upper left corner or center of the slide. For more information, see "Adding Graphics and Video Clips" on page 601.



- In Excel, the Format Shape dialog box appears. In the left pane, click Properties. Although you can't enter dimensions to identify a precise location, options here allow you to specify whether and how an object's position and size change when you change the width and height of underlying cells.



Aligning and Evenly Distributing Objects

In many cases, you won't want to fiddle with precise positioning of individual elements. Instead, you want to quickly align one or more objects, or you want to evenly space several objects on a page or slide. Office offers a quick path to each goal. To find that path, select the object (or objects); then, under Picture Tools, Drawing Tools, Chart Tools, or SmartArt Tools, click the Format tab. In the Arrange group, click Align to display an array of options, as shown in Figure 6-5.

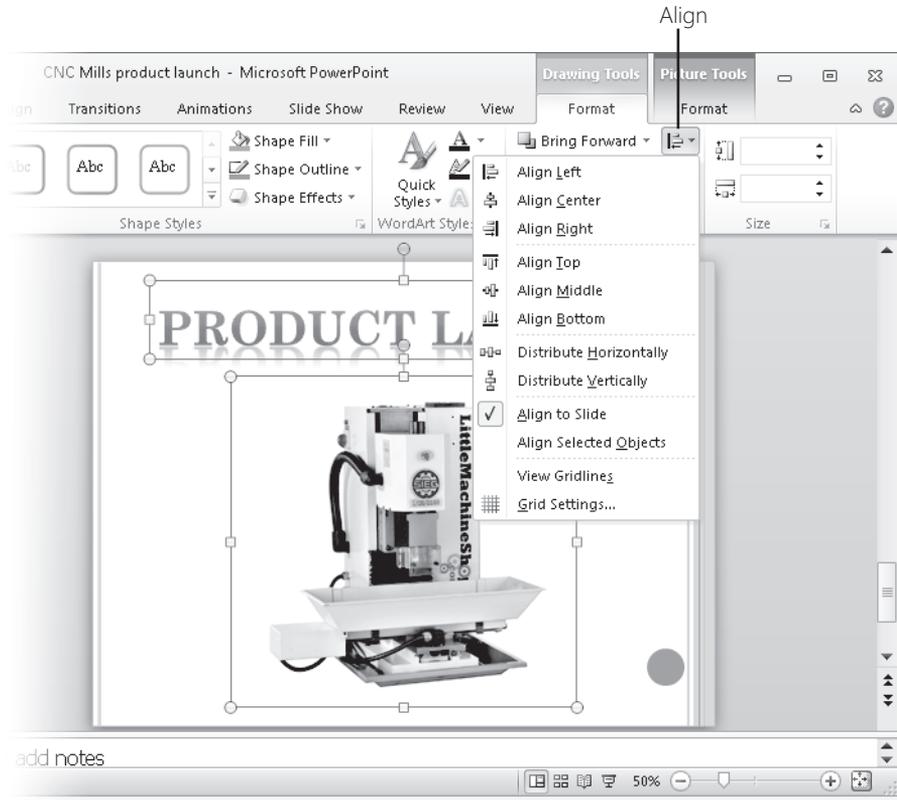


Figure 6-5 Regardless of how carelessly you place objects, you can whip them back into this arrangement with just two steps: click **Align Center** (to center each object horizontally) and click **Distribute Vertically** (to evenly space each object vertically).

Changing the Z-Order of Stacked Objects

As we explained earlier in this chapter, graphics and pictures are layered one in front of another in a virtual stack. You'll sometimes need to change the order so that one object doesn't improperly obscure another. For example, if you place a caption for a picture in a text box, you'll want the text box to be in front of the picture.

To move an object forward or back in the stack, select the object and, under **Picture Tools**, **Drawing Tools**, **Chart Tools**, or **SmartArt Tools**, click the **Format** tab. In the **Arrange** group, click either **Bring Forward** or **Send Backward**, which moves the object forward or backward one position in the stack. (Clicking the arrow next to these buttons exposes an additional command that moves the object all the way to the front or back of the stack.)

Alternatively, you can move items within the stack by using the Selection And Visibility pane, shown earlier in Figure 6-4. Select the item to move, and then click a Re-Order arrow to move the item up (toward the front of the stack) or down (toward the back) in the list of shapes.

Resizing and Rotating Graphics and Pictures

The techniques for changing the size or the orientation of pictures are similar to those for positioning objects. You can directly manipulate objects by clicking and dragging, or for more precise control, you can enter specific values in a dialog box.

To resize an object using the mouse, select the object and then drag one of the sizing handles (shown earlier in Figure 6-2). Your results might not match your expectations unless you use these techniques:

- To maintain the object's aspect ratio, use one of the corner sizing handles and hold down the Shift key as you drag. (For pictures, it's not necessary to hold Shift to maintain the aspect ratio. But it doesn't hurt, and that way you can use a consistent technique for all object types.)
- To keep an object centered in the same location as you change its size, hold down Ctrl as you drag.
- To maintain the aspect ratio and the center location, hold Ctrl and Shift as you drag.

To resize using the keyboard, select the object and then hold Shift as you press an arrow key. Hold Ctrl+Shift to enlarge or reduce in smaller increments.

You can achieve greater precision when you resize by entering dimensions in the Size group on the Format tab or in a dialog box. Right-click the object, and choose Size And Position (Word, PowerPoint, and Outlook) or Size And Properties (Excel). In the resulting dialog box, you can specify the dimensions or enter a scaling factor, which calculates the size as a percentage of the object's current size or original size. Figure 6-6 shows the Format Shape dialog box in PowerPoint; you'll find similar options in the other Office programs.

You'll sometimes want to rotate graphics and pictures in a document. This might be required because your camera doesn't automatically rotate pictures when you shoot in portrait orientation. Or you might want to tilt an item slightly as an artistic effect.

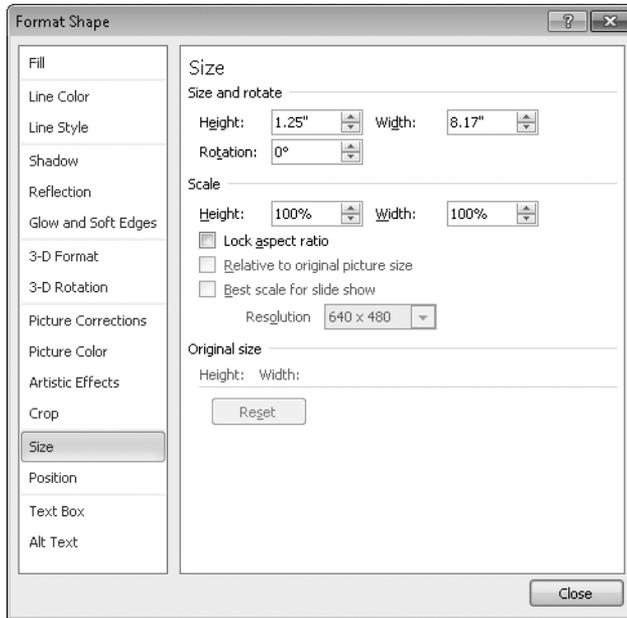
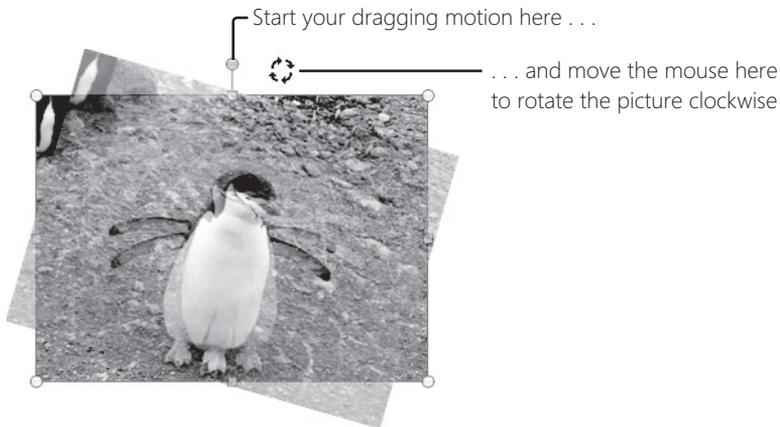


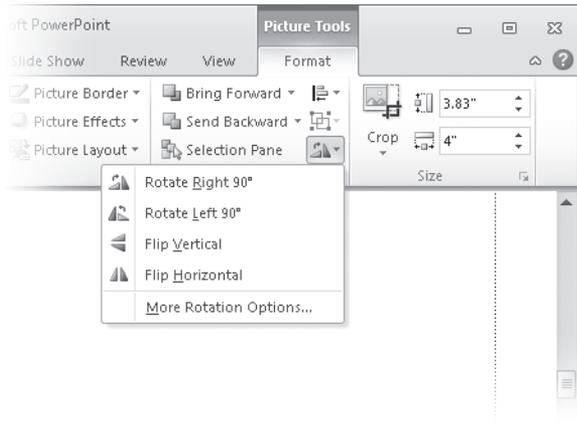
Figure 6-6 As you change the height and width, the scaling values change to match—and vice versa.

To rotate a graphic or picture with the mouse, select it and then point to the rotate handle (shown earlier in Figure 6-2). Drag in either direction around the center of the object, and it rotates in that direction.



You'll find that the image "snaps" into position at each 90-degree mark when you rotate it using the mouse. If your intent is to rotate an image 90 degrees, an easier method is to use

the Rotate tool, which is in the Arrange group on the Format tab (under Picture Tools or Drawing Tools).



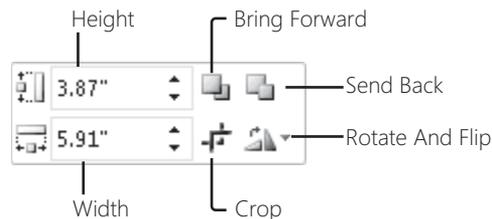
Rotate the selected object with the keyboard by holding the Alt key as you press the Left Arrow (for counterclockwise rotation) or Right Arrow key. Each keypress rotates the object 15 degrees. Press Ctrl+Alt with an arrow key to rotate 1 degree at a time.

The last command on the Rotate menu, More Rotation Options, opens the Layout dialog box (Word) or Format Shape dialog box (shown earlier in Figure 6-6), where you can specify a rotation angle with one-degree precision.

INSIDE OUT

Use the Mini toolbar

When you right-click an object, a Mini toolbar that includes the most commonly used tools on the Format tab appears.



Office also supports three-dimensional rotation of graphics and pictures. For more information, see “Adding Shapes and Text Boxes” on page 175 and “Applying Picture Styles” on page 167.

INSIDE OUT

Specify dimensions using your preferred unit of measure

By default, Office displays measurements using the units associated with your computer's Region And Language settings, which turns out to be inches in the United States and millimeters in other countries. Nevertheless, in any Office dialog box, you can enter dimensions using any of the following units:

- Inches: in or "
- Centimeters: cm
- Millimeters: mm
- Points (a printer's measurement equal to 1/72 inch): pt
- Picas (a printer's measurement equal to 12 points, or 1/6 inch): pi
- Pixels (normally 1/96 inch; dots per inch [dpi] can be changed in Control Panel): px

To use one of these units, type the numeric value followed by one of the abbreviations in the list above. (If you don't specify the unit, Office assumes you're using the default unit.) As soon as you move to a different field in the dialog box, Office converts the dimension you entered to the default unit.

To change the default unit of measure in Word, Excel, or OneNote, click File, Options. In the Options dialog box, click Advanced, and then scroll to Display (Other in OneNote). Under that heading, you'll find the list of available units of measure. Note that your setting in one Office program doesn't affect the other programs. If you want to change the default setting for all programs (not just Office), visit Region And Language in Control Panel.

Grouping Objects

When you have several related objects properly positioned in relation to each other, you'll want to group them. Doing so makes it easier to move or manipulate all the component objects as one, and it prevents inadvertently modifying part of the graphic or picture.

A simple example of the benefit of grouping is a logo that comprises two objects: a design saved as a picture and a slogan in a text box. After resizing and moving the objects individually until they're in proper position, select them both. Then, on the Format tab, click the Group button (see Figure 6-7), and then click Group.

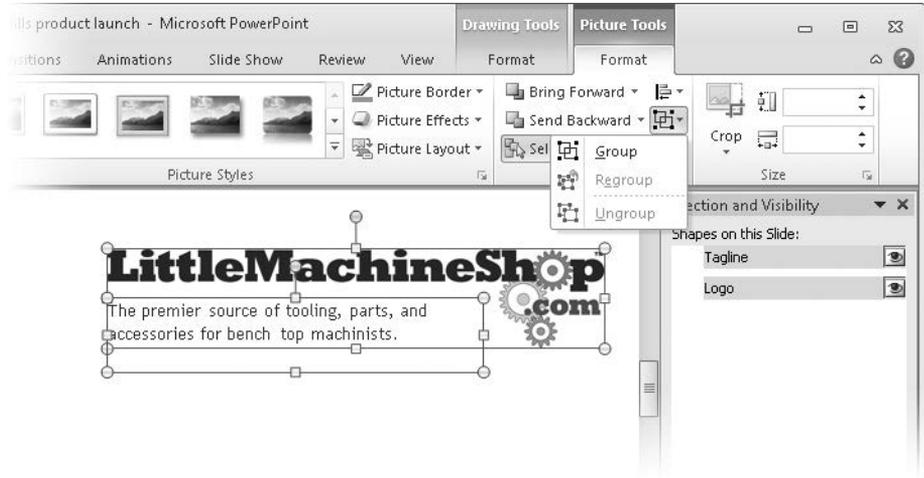


Figure 6-7 Choosing Group causes the selected objects to be combined into a single object, as shown in Figure 6-8.



Figure 6-8 After grouping, the grouped objects share a single selection frame. Note that the Selection And Visibility pane shows the objects within the group.

TROUBLESHOOTING

Grouped objects remain grouped after you choose Ungroup

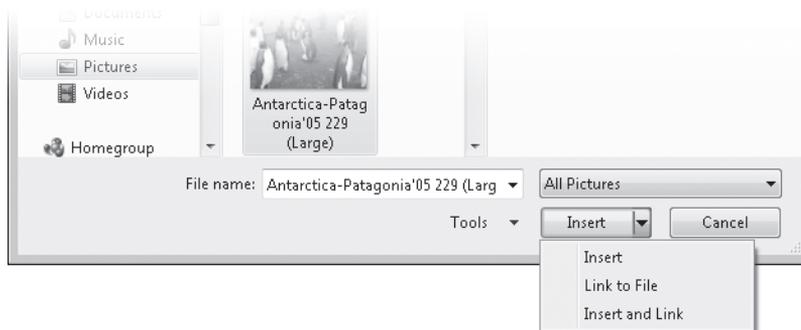
After you choose the Ungroup command, it might appear that the objects remain grouped. For example, if you drag one of the formerly grouped objects, all objects move together. The problem is that Office leaves all objects selected after you choose Ungroup. The solution is simple: Click outside any of the grouped objects, which clears the selection. You can then select individual objects.

Inserting Pictures into Office Documents

In the context of Office, “picture” refers to much more than photographs. Regardless of composition, a picture is a file in any of many popular graphics formats, including JPEG, Portable Network Graphics (.png), Graphics Interchange Format (.gif), Windows Bitmap (.bmp), Windows Metafile (.wmf), and Encapsulated PostScript (.eps).

To insert a picture, click the Insert tab, and in the Illustrations group (Images in PowerPoint), click Picture. The Insert Picture dialog box appears, which has all the same features as the familiar File Open dialog box. Navigate to the picture you want, select it, and click Insert. Note that you can select and insert multiple pictures simultaneously; hold Ctrl as you click to select each picture.

Also note the arrow next to the Insert button, which exposes two additional insert options.



Choosing Link To File commands Office to insert a link to the picture file’s location instead of embedding the picture file in the Office document. This results in a smaller document file size, but more importantly, it means the document will always show the current version of the picture file. If you change the file in its original location, you’ll see the updated version the next time you open the Office document. If the file is not available at the linked

location (if, for example, it has been renamed or deleted, or if it's on a server drive that's not currently available), a red X appears instead of the picture.

Insert And Link embeds the picture file in the document *and* includes a link to the original file. When you open a document, if the linked file is available, Office displays it; if not, Office displays the embedded version.

That's all there is to it. After you insert a picture, you can select it, move it, resize it, and work with it in various ways, as described in the next section, "Making Your Pictures Look Great."

INSIDE OUT

Choose a better default wrapping style for pictures in Word

When you insert a picture or screenshot in Word, by default it is placed at the insertion point. A graphic positioned this way (which is called In Line With Text) acts like any other letter or symbol in the text stream: when you type to the left of the graphic, it shifts to the right until it no longer fits and then wraps to the next line. In-line graphics work best in layouts that have text above and below each picture (like most of the screen illustrations in this book, for example) but not beside them. Place each picture in its own paragraph to use this style.

You can be much more creative in your layouts by setting pictures so that text "wraps" around them. To change the wrapping style for a picture, right-click it and choose Wrap Text. For details, see "Adding Pictures and Graphics" on page 237.

If you find yourself frequently changing the wrapping style, you should change the default. To do that, click File, Options. In the Word Options dialog box, click Advanced. Under Cut, Copy, And Paste, locate Insert/Paste Pictures As, and select an option.

Making Your Pictures Look Great

Programs in Office 2010 include picture editing tools that rival many stand-alone programs for editing digital images. Using just the tools in Word, Excel, PowerPoint, or Outlook, you can apply artistic touches such as blurs, paint strokes, and mosaic effects. A number of predefined picture styles include borders, reflections, 3-D effects, and perspective tilting. You can automatically outline the subject of a photo and remove the background. Other tools let you overlay text in creative ways. And then there are the more mundane tasks: making color corrections; adjusting brightness, contrast, and sharpness; and resizing photos. A new cropping tool even makes it easier to see what you're removing from the image.

A complete description of the picture-editing capabilities of Office could fill a chapter—or a book—so we don't explain every option in detail. Fortunately, with the start we provide here, you'll find that these features are easily discoverable. And the Live Preview capability provided by most of the picture-editing tools makes them intuitive to use as well.

For information about two other common tasks that apply to other types of graphics as well as pictures, see "Resizing and Rotating Graphics and Pictures" on page 157.

Cropping Pictures

You're an exceptional photographer if each picture you take is perfectly composed. For those pictures that aren't perfect, you'll want to crop to remove unnecessary background or to better fit the space in your document. Earlier Office versions had cropping capabilities, but they were difficult to use because you couldn't really see what you were doing. In Office 2010, you can see exactly what's included and what's excluded before you commit.

To crop a picture, select it, click the Format tab (under Picture tools), and in the Size group, click Crop. Cropping handles appear on your picture; drag a handle to adjust the cropping. Alternatively, you can drag the picture. Either way, note that the area to be cropped out remains visible but shaded. To crop equally from both sides of a picture, hold Ctrl as you drag one of the side cropping handles. To crop equally from all four sides, hold Ctrl and drag one of the corner handles. Press Esc or click outside the picture when you're done.

As shown in Figure 6-9, you can also crop to a particular aspect ratio (that is, the ratio of width to height). This is useful when you want an image to perfectly fill a screen or a particular size of photo paper or picture frame, for example. Click the arrow by the Crop button, and then click Aspect Ratio and select the ratio you want.

Note that when you drag a cropping handle, the aspect ratio is not maintained; you get free-form dragging just as if you used the normal Crop command. You'll sometimes find that getting the best results when cropping to a particular aspect ratio requires an iterative process of resizing and cropping. Those iterations might also include choosing the Fill or Fit command on the Crop menu. Both commands maintain (or restore, if necessary) the original picture's aspect ratio, but they crop the image to fit the current picture shape and size.

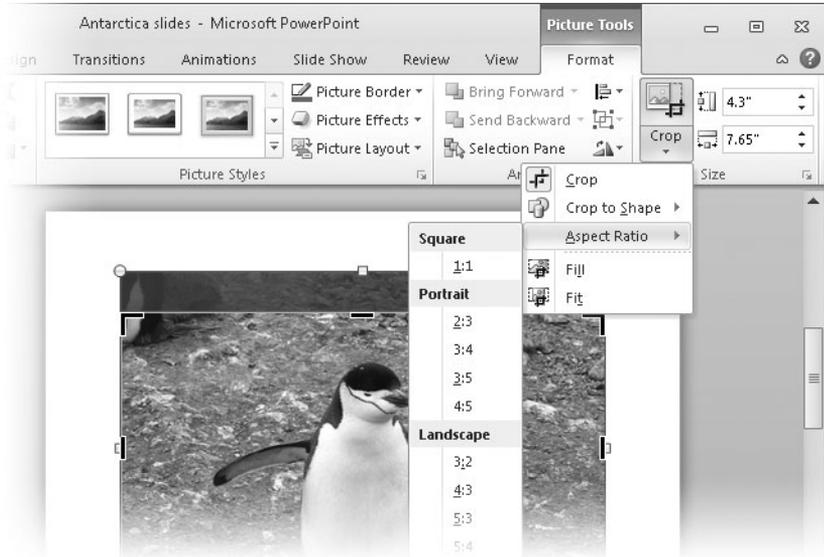
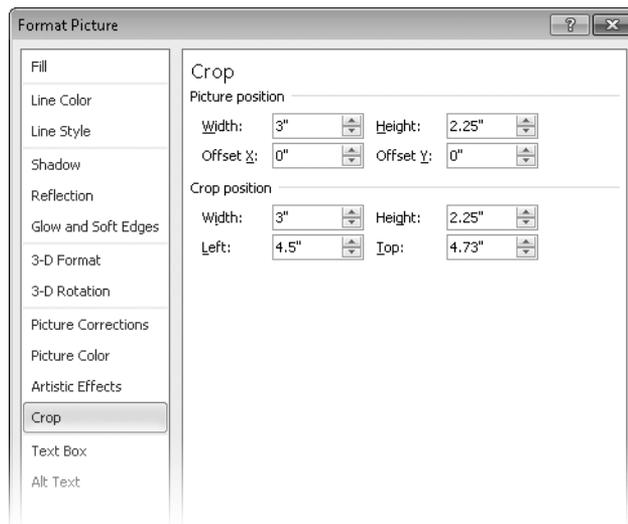


Figure 6-9 To maintain the aspect ratio after you make a selection, drag the picture instead of dragging the cropping handles.

For more precise cropping control, right-click the picture and choose Format Picture. In the left pane of the Format Picture dialog box, click Crop, and then enter the dimensions.



If you find rectangular cropping to be too dull, you might enjoy experimenting with the Crop To Shape command on the Crop menu. With it, you can get some truly strange (and sometimes wonderful) effects by using predefined shapes as crop outlines. (Figure 6-10 shows an example of the former.) Most shapes can be modified in various ways after you apply them. For more information about working with shapes, see “Adding Shapes and Text Boxes” on page 175.

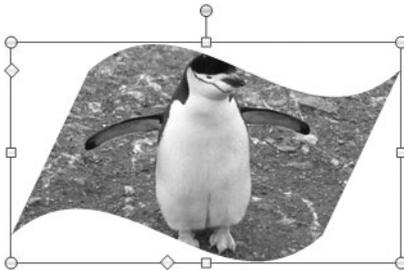


Figure 6-10 Drag the shape handles (in this example, the diamonds along the left and bottom edges) to adjust the shape.

Adjusting Colors and Applying Artistic Effects

Features in Office for correcting picture colors and applying special effects range from the essential to the bizarre. Yet they're generally easy to understand, and, best of all, with Live Preview you're able to see how a particular setting looks with *your* picture. You don't need to rely on a thumbnail of a sample picture or try to guess how numeric settings translate to visual images.

The tools for adjusting color are on the Format tab (under Picture Tools) in the Adjust group. Select a picture, click the Format tab, and then click Corrections to see a gallery of options for adjusting the picture's sharpness, brightness, and contrast. As shown in Figure 6-11, clicking Color displays a gallery for adjusting saturation and tone, as well as for applying a color tint to the picture. To see how a setting will look, simply hover the mouse pointer over it, and the setting is temporarily applied. When you find the one you like, click it.

The third gallery in the Adjust group, Artistic Effects, works in an identical fashion. The effects include an assortment of filters and simulated techniques, such as pencil sketch, paint brush, looking through frosted glass, and so on. Most defy description, so the best way to learn about them is to open the gallery and point.

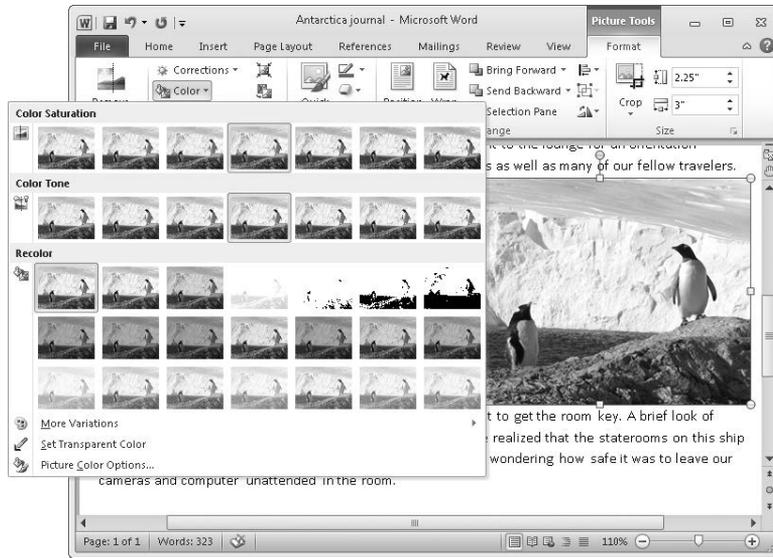


Figure 6-11 The current settings have a bold outline in the gallery.

At the bottom of each gallery is a command that leads to an options dialog box. You can get to the same dialog box by right-clicking the picture and choosing **Format Picture**, or by clicking the dialog box launcher in the lower right corner of the **Picture Styles** group on the **Format** tab. In the **Format Picture** dialog box, click **Picture Corrections**, **Picture Color**, or **Artistic Effects**. You can view and edit numeric values that correspond to the gallery settings, and you can make precise adjustments to the settings. In addition, **Presets** buttons on each tab provide another gallery view. One difference here: To see the effect on your picture, you must click the thumbnail in the gallery; pointing to it does nothing.

Applying Picture Styles

The **Picture Styles** group on the **Format** tab contains tools for adding a border to your picture and for applying effects such as shadows, reflections, glows, and three-dimensional rotation. The **Picture Styles** group also includes a **Quick Styles** gallery, which contains pre-configured combinations of each of these settings.

To use the **Quick Styles** gallery, select one or more pictures, and then point to one of the visible thumbnails. If none of those suit your fancy, you can scroll down in the gallery or, better yet, click the **More** button, the arrow at the bottom of the scrollable window. Figure 6-12 shows an example. When you find a suitable option, click it to apply the settings.



Figure 6-12 The Quick Styles gallery makes it easy to try different effects.

To make your own settings—or to adjust the ones made by a Quick Styles preset—click **Picture Border** (where you can select a color, line width, and line style) or **Picture Effects** (where you can choose shadows, reflections, glows, softened edges, bevels, and three-dimensional rotation from galleries). Each of these options can be viewed and fine-tuned in the **Format Picture** dialog box. Click the dialog box launcher in the **Picture Styles** group, and then click **Line Color** or **Line Style** to set up a border, or click **Shadow**, **Reflection**, **Glow And Soft Edges**, **3-D Format**, or **3-D Rotation** to make settings that correlate to the **Picture Effects** galleries.

Another option in the **Picture Styles** group, the **Picture Layout** gallery, embeds your selected pictures into **SmartArt** objects. With this feature, you can make some professional-looking presentation materials with just a few clicks. For more information, see “Adding **SmartArt** to Documents” on page 180.

Removing the Picture Background

Another feature new to Office 2010 is one that automatically removes the background from a picture, leaving only the picture subject visible. To use this feature, it helps to have a picture with the subject in sharp focus, and with good contrast. Yet you can sometimes get surprisingly good results even with less-than-perfect pictures.

To remove the background from a picture, select the picture, click the **Format** tab, and in the **Adjust** group, click **Remove Background**. Office quickly makes its best guess at crop-

ping and masking the background, which it identifies with a magenta overlay. As shown in Figure 6-13, this initial attempt isn't always perfect.

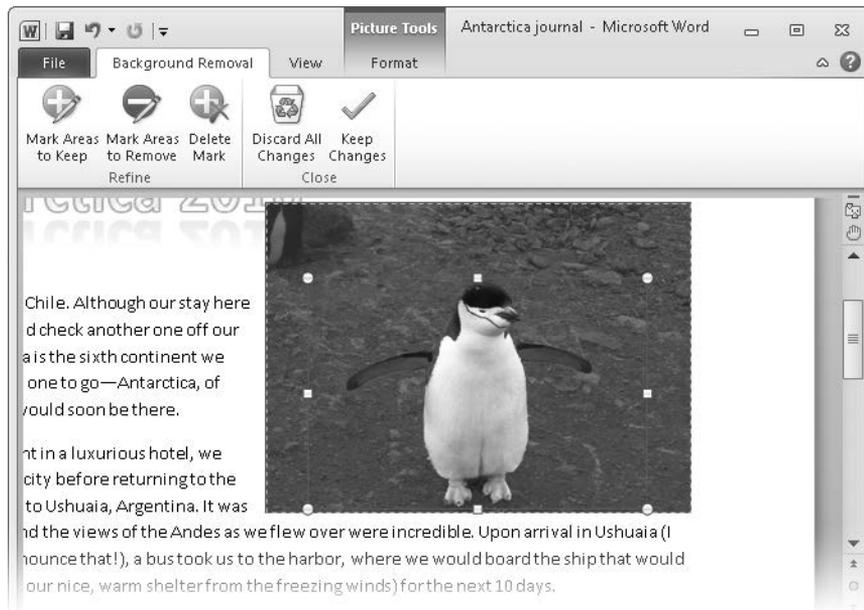


Figure 6-13 Initially, Office didn't include this penguin's wings, which are closer in color to the background than to the rest of the penguin.

If the initial results aren't quite right, click **Mark Areas To Keep**, and then click the additional areas to include (such as the penguin's wings in Figure 6-13). Click **Mark Areas To Remove** and then click any unwanted areas that Office left in. If a single click merely deposits a mark but doesn't include or exclude the area of interest (as indicated by the colored mask), try dragging through the area. When you're done, click **Keep Changes**. In our example, we zoomed in, and then it took just a drag along the length of each wing to produce this result.



INSIDE OUT

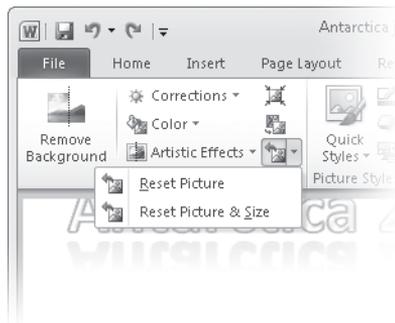
Adjust the cropping area

You'll find that with some photos, automatic background removal doesn't work well, and the initial results mistakenly include or exclude several areas. Before you start making manual corrections, the first thing you should do is adjust the cropping indicators to more closely match the final outline you want. When you change the cropping, Office modifies the background selection and, in our experience, often does a much better job with your assistance here.

Undoing Picture Edits

As you experiment with the picture formatting features in Office, not every shot is going to be a keeper. Mistakes that you recognize right away, of course, can always be undone in the usual manner: click Undo on the Quick Access Toolbar, or press Ctrl+Z. But you might decide much later to revert to the original photo settings.

Doing so is quite simple: Select the picture, click the Format tab, and in the Adjust group, click Reset Picture (to restore the background, remove borders and other picture styles, and restore the original colors) or Reset Picture & Size (to do all of the foregoing, plus remove any cropping and restore the picture's original size).



TROUBLESHOOTING

Changes to pictures can't be undone, or edits disappear

A setting buried deep in Office options can lead to some head-scratching moments if it's not set properly. The symptoms can be either of the following:

- After making various picture edits, as described in the following sections, you decide you don't like the changes and want to restore the original picture—but the Reset button is unavailable.
- Each time you open a document containing a picture inserted with the Link To File or Insert And Link command, all the artistic effects and other edits you've added are gone, and the original picture file appears.

These seemingly opposite symptoms can arise from the same root cause: the Discard Editing Data setting. To review the setting, click File, Options. In the Options dialog box, click Advanced, and scroll to Image Size And Quality. Unless reducing the file size of your Office document is paramount, clear Discard Editing Data.

What About Office Picture Manager?

Office 2010 includes a program called Microsoft Office Picture Manager, which you'll find on the Start menu in the Microsoft Office 2010 Tools subfolder of the Microsoft Office folder. Office Picture Manager provides a way to manage your pictures as stand-alone files outside Office documents. With Office Picture Manager, you can convert picture files from one format to another (by using its Export command, not Save As). Compared with the tools built in to the primary Office programs, Office Picture Manager has slightly better options for color correction (but no live previews) and a few additional tools, such as red-eye removal.

Nonetheless, Office Picture Manager is a relic from earlier Office versions, and there's little reason to use it because better options are readily available. Windows Live Photo Gallery (available as a free download from Microsoft at download.live.com) provides all the functionality of Office Picture Manager and more. Another program we recommend is IrfanView (irfanview.com), which offers unsurpassed viewing capabilities and file conversions, among other features.

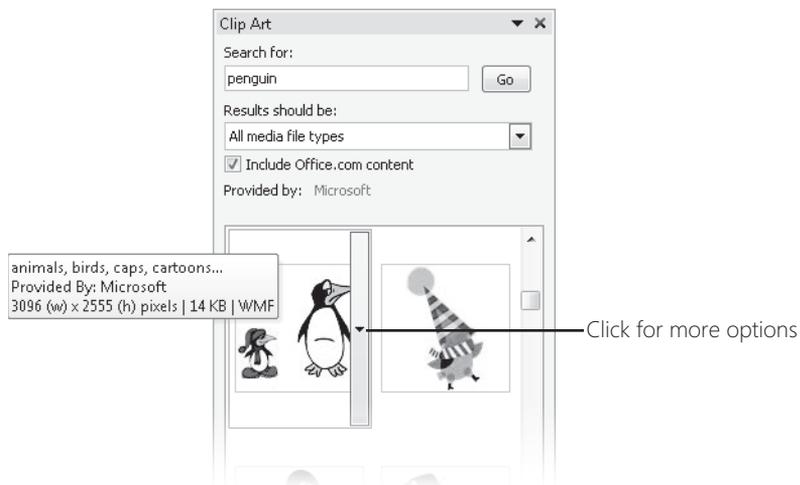
Finding and Using Clip Art

The term “clip art” comes from the days when graphic artists would purchase printed catalogs of stock art, from which they would “clip” (literally cut out) an item to be pasted into camera-ready artwork. Although the methods have changed radically, clip art lives on—now in the form of an online catalog of line art, illustrations, photographs, audio clips, and video clips.

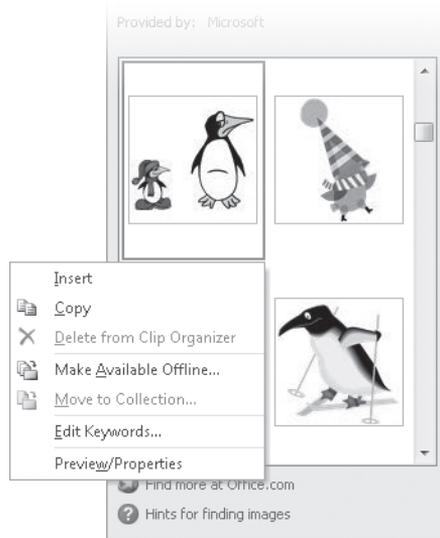
For more information about working with video, see “Adding Graphics and Video Clips” on page 601.

To find and insert clip art, follow these steps:

1. Click the Insert tab, and click Clip Art. The Clip Art task pane appears.
2. Under Search For, type a word or two that describes what you’re looking for.
3. Click the arrow by Results Should Be, and select the types of media you want to include in your search.
4. To include Microsoft’s online catalog in the search, select Include Office.com Content. If you don’t select this box, Office looks only at your local collection, which includes a handful of clip art included with Office 2010, plus any items you’ve added to your collection.
5. Click Go. To learn more about a displayed result, hover the mouse pointer over it.



6. To insert an item in your document, click it. For other options, click the arrow along its right side.



Choose Make Available Offline if you want to reuse the clip in the future. Office stores the clip in a collection, which is a database file stored on your computer. You can organize your clip collection into folders (you're asked to select a folder or create a new one when you choose Make Available Offline), which can be useful for managing large collections.

Although the search capabilities of the Clip Art task pane don't rely on the organizational structure of your collections, if you feel compelled to tidy them up, Office 2010 includes for that purpose a program called Microsoft Clip Organizer. You can find it on the Start menu by clicking All Programs, Microsoft Office, Microsoft Office 2010 Tools. Clip Organizer is also useful if you want to add items to your collections from files on your computer, a scanner, or a camera. Other than that, there's seldom reason to venture into Clip Organizer.

INSIDE OUT Edit clip art

A limitation of stock art is that it might not precisely fit your artistic concept. Many clip art images can be modified, however. For example, you can right-click an illustration and choose Edit Picture. Office warns that the picture is not editable, but then offers to convert it to an editable format. Click Yes, and get creative. Similarly, imported photographs can be modified with any of the techniques and effects described earlier in "Making Your Pictures Look Great" on page 163.

Capturing and Inserting Screenshots

You'll sometimes find it useful to insert a representation of a window (or part of a window) clipped from your computer's screen. For example, you might want to include part of a web page in a document, or if you're documenting computer procedures for your office, you might want to show a program window.

To insert a screenshot, first be sure that the window you want to capture is not minimized to the taskbar. (It's okay if it's covered by other windows, including the Office window you're working in.) Then click the Insert tab, and in the Illustrations group, click Screenshot. Thumbnail images of each window appear, as shown in Figure 6-14.

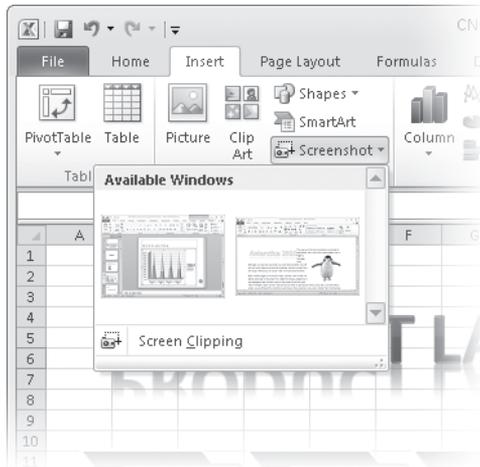


Figure 6-14 Available windows include all windows and dialog boxes that are not minimized, except for the Office window in which you're working.

Click a thumbnail to insert an image of the entire window. If you want to show only part of the screen, you can crop the window image after you insert it, or you can click Screen Clipping. When you click Screen Clipping, the Office window disappears from view, exposing the underlying screen—whatever it may contain. Use the mouse to drag across the area you want to capture, creating a rectangular clipping area. When you release the mouse button, Office immediately inserts an image of the area you outlined.

Note

Although OneNote doesn't have the ability to capture and insert entire windows, you can grab screen clippings in OneNote. On the Insert tab, in the Images group, click Screen Clipping. For more information, see "Screen Clippings" on page 504.

INSIDE OUT

Capture the Office window

Ironically, the new screenshot feature in Office 2010 doesn't let you capture an image of the Office program itself. Workarounds abound, but the simplest is to press **Alt+PrtScn** (which copies the current window to the Clipboard) and then press **Ctrl+V** to paste the Clipboard content into your document.

Inserted screenshots are handled by Office programs exactly like pictures. When you select a screenshot, Picture Tools appears on the ribbon. The Format tab contains the same tools and features, and you can apply to a screenshot any of the changes described earlier in "Making Your Pictures Look Great" on page 163.

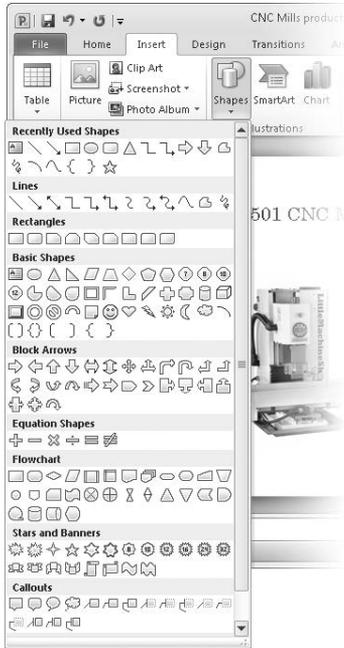
Unlike pictures that you insert, however, screenshots don't exist elsewhere as an image file. In Word, OneNote, PowerPoint, and Outlook (but not Excel), it's easy to create such a file. Simply right-click the image and choose **Save As Picture**.

Adding Shapes and Text Boxes

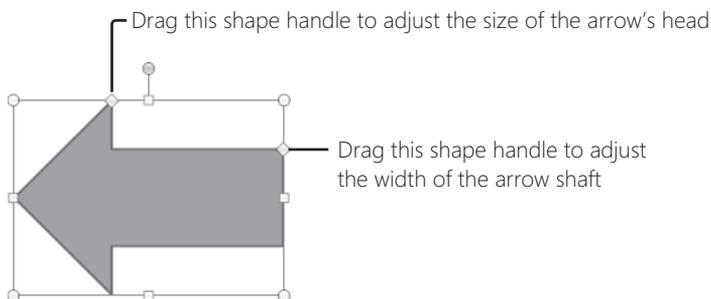
Office includes a variety of shapes that can be inserted as line illustrations. Shapes include arrows and other symbols to use in diagrams, various polygons, boxes for callouts and other text, and some that'll leave you wondering what possible use they could have. Although the unadorned shapes are not much to look at, Office includes a full range of effects, colors, shading, and other customizations that can add some pizzazz to your document.

The tools for inserting and customizing shapes also work on text boxes. A text box is, in fact, merely a rectangular shape that can contain text.

To insert a shape, click the **Insert** tab, and in the **Illustrations** group, click **Shapes**. A gallery of predefined shapes appears. (If you're inserting a text box, you can bypass the Shapes gallery by clicking **Text Box**, which is in the **Text** group on the **Insert** tab.)



Click a shape, and then drag in the document to create a container for the shape. Don't worry if the size or position isn't quite right; you can easily change move, resize, or rotate the shape by selecting it and dragging its handles. (For details, see "Positioning Objects" and "Resizing and Rotating Graphics and Pictures" earlier in this chapter.) To modify a shape, select the shape and look for shape handles, which appear as yellow diamonds.



For more fine-grained control, on the Format tab, in the Insert Shapes group, click Edit Shape, Edit Points (or right-click the shape and click Edit Points). Each point that defines the shape appears as a black square, which you can drag in any direction. To add a new point, hold down Ctrl and click anywhere on the shape's outline; Ctrl+click an existing point to remove it. When you click a point to select it, two additional handles appear; together,

these three points define the point and the line segment on either side of it. You can drag the point or one of its handles to get different effects. To change the type of point, hold Shift (for a smooth point), Ctrl (straight point), or Alt (corner point) as you drag a handle.

The real fun begins when you apply shape styles. Select a shape, click the Format tab (under Drawing Tools), and click the More button in the Shape Styles group to see a gallery of predefined styles, as shown in Figure 6-15. Like the Picture Styles gallery, this one uses Live Preview; as you point to a thumbnail, its formatting appears in your document as well. Click a gallery item to apply the formatting.

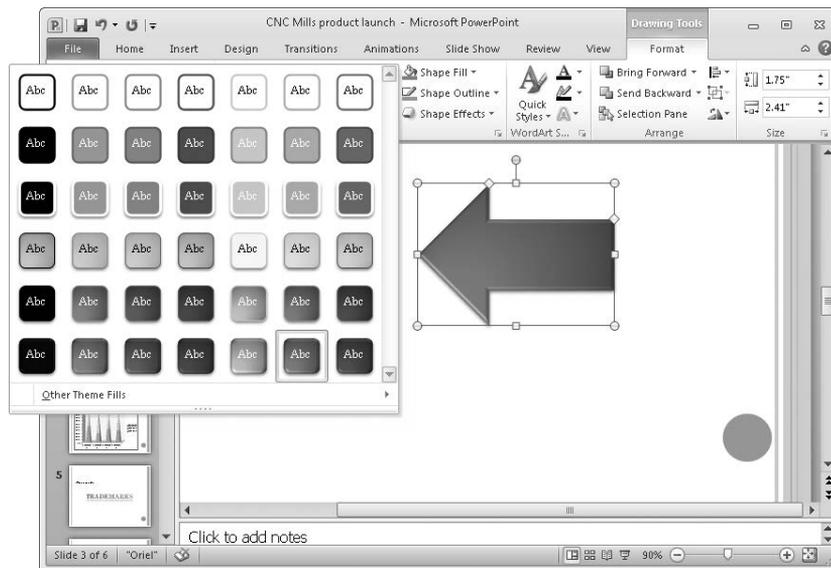


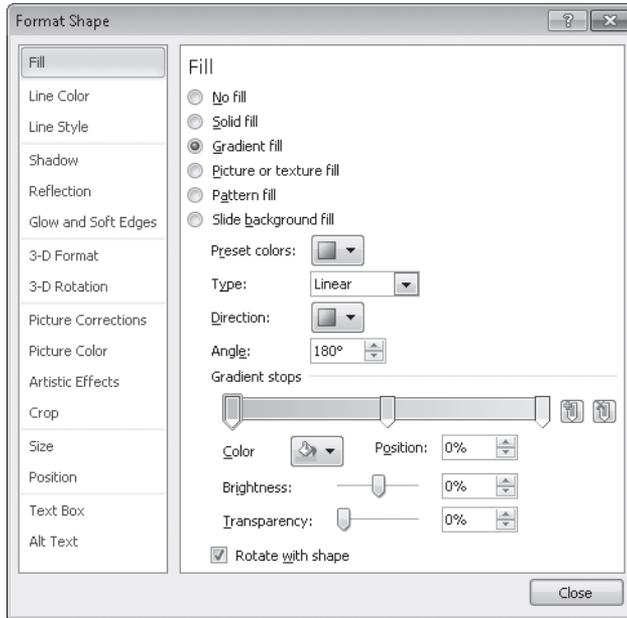
Figure 6-15 The Shape Styles gallery can apply pleasing combinations of colors and effects with a single click.

The Shape Styles gallery displays colors and styles that conform to the currently selected theme; changing the theme also changes the gallery contents. (For more information, see “Using Office Themes” on page 185.) If none of the options in the Shape Styles gallery tickles you, use the tools on the right side of the Shape Styles group on the Format tab:

- **Shape Fill** Options here let you fill the shape with a color (either solid or as a gradient), a picture from a file on your computer, or a texture (from a gallery that includes various fabrics, stones, wood grains, and other materials).
- **Shape Outline** Select a color, line weight, and line style for the shape’s outline.

- **Shape Effects** Available effects are similar to the ones you can apply to pictures: shadows, reflections, glows, soft edges, bevels, and three-dimensional rotation, each of which is displayed in a Live Preview gallery.

All the settings available on the Format tab—and more—can also be configured in the Format Shape dialog box. To view it, click the dialog box launcher (the arrow in the lower right corner of the Shape Styles group on the Format tab) or right-click a shape and choose Format Shape.



INSIDE OUT

Copy and move graphics and formatting

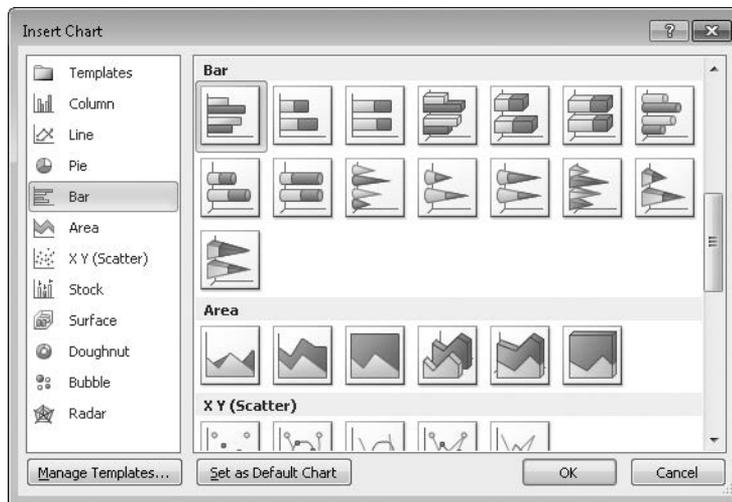
To copy or move a selected graphic or picture, you can use the Clipboard as you would with ordinary text. The usual keyboard shortcuts (Ctrl+X for Cut, Ctrl+C for Copy, and Ctrl+V for Paste), Home tab commands, and menu commands do the job.

But—just as you can with text—you can copy all the formatting for a graphic or picture, which is handy when you need to apply extensive (but consistent) styles and formats to many pictures. Use the Format Painter or use keyboard shortcuts: Ctrl+Shift+C to copy formatting, and Ctrl+Shift+V to paste formatting. For more information, see “Copying Formatting” on page 128.

Displaying Data Graphically with Charts

Data charts have been a key feature of Excel since its earliest appearance back in 1985. The chart capabilities and features increased dramatically over the years, of course, but full-featured charting remained primarily an Excel feature, with lesser charting capabilities available in other Office programs. With Office 2010, however, the full range of charting features is available in Word, PowerPoint, and Outlook, as well as Excel.

To insert a chart in a document, click the Insert tab and then click Chart. The Insert Chart dialog box appears, in which you can select from an astonishing gallery of chart types. (Because charting remains a central part of Excel, there isn't a single Chart tool on the Insert tab. Instead, each chart type appears in its own gallery. You can, however, open Insert Chart by clicking the dialog box launcher in the Charts group on the Insert tab.)

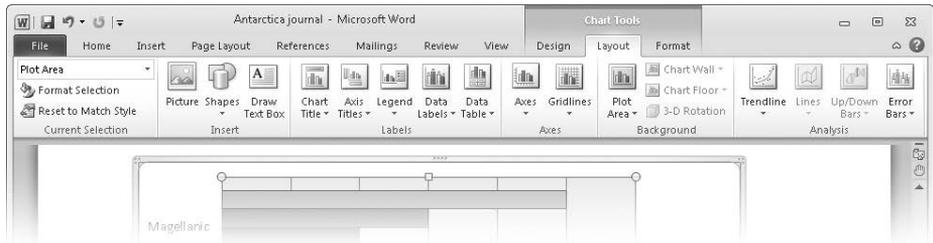


Select a chart type (you can change it later) and click OK. A worksheet then opens in a new window in Excel; this is where you enter the data for your chart. You can then switch back and forth between entering data in the Excel window and viewing and formatting the resulting chart in your document window. (If you're inserting a chart in Excel, the data and the chart appear in different parts of the same window.)

To change the appearance of your chart, select the chart and click the tabs under Chart Tools:

- Use the Design tab to change overall settings, such as chart type, data orientation, and styles.

- On the Layout tab, you can modify specific chart elements, such as titles, axes, and legends.



- The Format tab is the place to manage shape styles, position, and size—settings we cover elsewhere in this chapter. (See “Adding Shapes and Text Boxes” on page 175; “Positioning Objects” on page 154; and “Resizing and Rotating Graphics and Pictures” on page 157.)

For details about displaying data with charts, including descriptions of features on the Design and Layout tabs, see Chapter 13, “Charts and Data Analysis.”

Adding SmartArt to Documents

SmartArt graphics provide an easy way to create graphical lists, process diagrams, organizational charts, and similar diagrams that meld shapes, text, and pictures into compelling visuals.

To insert SmartArt, click the Insert tab, and click SmartArt. A dialog box appears, in which you can select from an array of layouts, as shown in Figure 6-16. Select one and click OK.

The next step is to enter text into the SmartArt graphic. If the Text pane isn’t displayed, select the graphic and click the arrow at the center of the left side of the frame. Within the Text pane, shown in Figure 6-17, use the keyboard shortcuts shown in Table 6-2. Alternatively, right-click an item in the Text pane, and choose from the menu. Tools in the Create Graphic group on the Design tab under SmartArt Tools provide a third (and sometimes best) method for organizing the text in a SmartArt graphic.

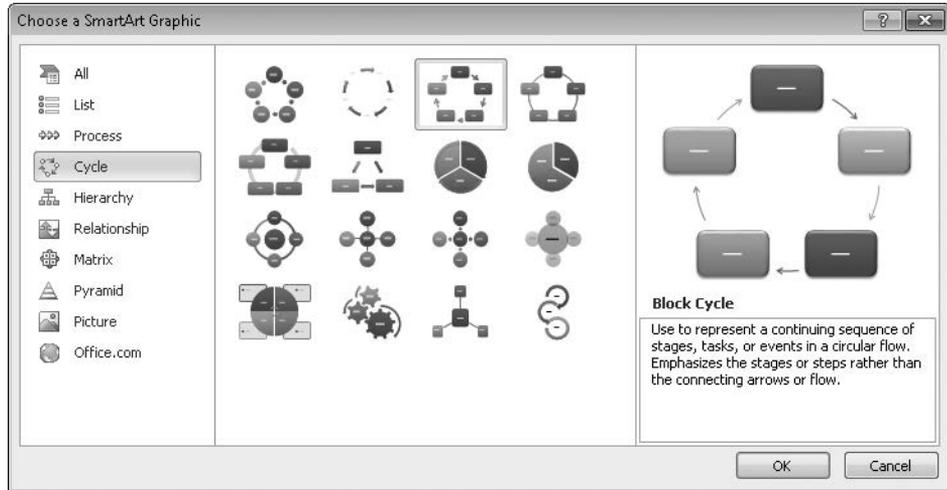


Figure 6-16 When you select a graphic, a larger visualization and a description of the graphic's use appear in the right pane.

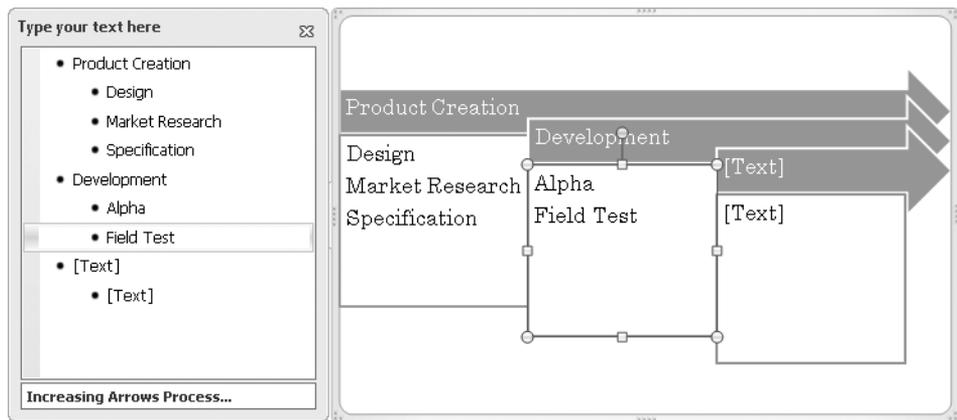
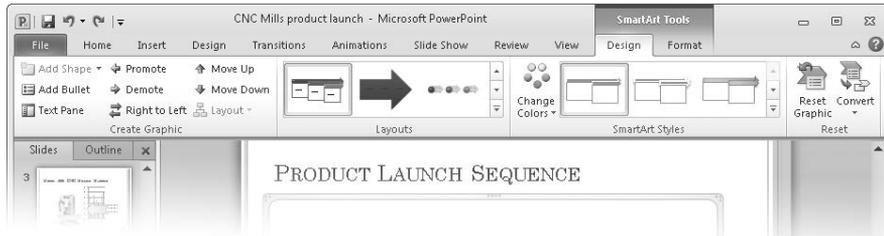


Figure 6-17 Although you can enter text directly into the graphic, it's usually easier with the aid of the Text pane.

Table 6-2 Keyboard Shortcuts for Text Entry in SmartArt Graphics

Action	Keyboard Shortcut
Go to next entry	Down Arrow
Go to previous entry	Up Arrow
Create new entry	Enter
Delete entry	Delete (you must first delete any text)
Demote current entry	Tab
Promote current entry	Shift+Tab

The Design tab under SmartArt Tools includes galleries in which you can select a different SmartArt design (in the Layouts group), a different color scheme (in the SmartArt Styles group), or a different style (a predefined configuration of fill, outline, and effects settings for shapes and text in the SmartArt graphic).



You'll find more granular controls on the Format tab under SmartArt Tools. You can modify shapes individually or en masse (a SmartArt graphic is an assemblage of individual shapes) by using the tools and techniques described earlier in this chapter for individual shapes. (See "Adding Shapes and Text Boxes" on page 175.) In addition, you can format text using all the options available for WordArt, as described in the next section.

Applying Text Effects with WordArt

A fixture in Word for many years, WordArt has changed significantly (for the better) in recent editions. It's now easier to use, more flexible, and can create attractive text effects—instead of the funhouse-mirror style distortions that typified its output in earlier editions. Moreover, you can now use WordArt in Excel, PowerPoint, and Outlook as well as Word.

To convert existing text to WordArt, first select the text. Then (whether you have text selected or not) click the Insert tab, and in the Text group, click WordArt. A gallery of colorful styles appears. Click one, and you'll see your text (or placeholder text, if you didn't have any selected) in the new style. When the selection frame is a dashed line, you can select and enter text. (Use the Esc and Enter keys to switch between text entry and formatting modes.) You also specify a font, font size, and effects such as bold and italic while you're in text entry mode; use the usual text formatting tools on the Home tab or the Mini toolbar.

With your text in place, you can proceed to modify other aspects of its appearance. Select the WordArt object and then click the Format tab (under Drawing Tools). Here, in the WordArt Styles group, you can select a different predefined lettering style from the gallery. (If a Quick Styles button appears, click it to display the gallery.) The three tools to the right of the gallery offer additional customization options similar to those available for shapes:

- Click Text Fill to select coloring options for the letters. You can select a color (solid or gradient). Or go crazy: use a picture from a file or a texture cropped to the shape of the letters.

- Click Text Outline to specify the color, line weight, and style of the letter outlines.
- Click Text Effects (see Figure 6-18) to add shadows, reflections, and other effects. Each item on the Text Effects menu leads to a gallery submenu with Live Preview.



Figure 6-18 You'll find the funhouse-mirror effects in the Transform gallery.

All the settings and effects available on the Format tab, along with additional options, can be viewed and configured in the Format Text Effects dialog box. To open it, click the Word-Art Styles dialog box launcher.

Drawing with Ink

On tablet PCs and other computers equipped with pen input, you can use your stylus to add “ink” to a document. You might find this convenient for taking notes, marking up corrections, or inserting free-hand drawings.

When the stylus gets close to the display, Ink Tools appears on the ribbon and below it, the Pens tab, which is shown in Figure 6-19. In the Write group, you select a tool—pen, highlighter, or eraser—and your stylus acts as that tool. To use your stylus in its other role—as a mouse replacement that you can use to select text and objects, position the insertion point, and so on—click (or, more accurately, tap) Select Objects.



Figure 6-19 In the Pens group you specify the color and thickness for each pen and then select your favorites, which remain visible without you having to open a gallery.

Ink is stored as an object similar to any other graphic. Click to select it, and you'll see the familiar selection frame along with its sizing and rotate handles. When selected, the Format tab under Drawing Tools becomes available, although most of its tools and effects can't be applied to ink.

The inking feature has a couple of nonobvious tricks that assist in converting your scrawl into usable data:

- If you click Convert To Shapes (in the Ink Art group on the Pens tab) before you begin drawing, when you draw a shape that resembles a circle, rectangle, or other standard shape from the Shapes gallery, Office instantly and automatically converts it from ink to a normal shape object. With this capability, you can sketch out organization charts, flow charts, and similar diagrams and not have it appear like it was created by a six-year-old.
- You can convert handwritten text into typed characters. Right-click the ink object that contains your handwriting, and choose Copy Ink As Text. The text is now on the Clipboard, and you can paste it into your document. The handwriting-to-text conversion isn't perfect (although we've seen it correctly interpret scratchings that we had trouble reading), so be sure to proofread it carefully.

Using Office Themes

The final section of this chapter deals not with individual graphic objects but with a feature that can change the overall appearance of your document with just a few clicks. That feature is document themes. A *theme* is a collection of formatting options that include a set of colors, a set of fonts (one for headings and one for body text), and a set of effects (such as line styles and fill effects).

A theme in PowerPoint also includes backgrounds. For more information about themes in PowerPoint, see “Applying Themes” on page 611.

Selecting a theme causes all these theme elements to be applied to a document. (You can override theme settings for any part of a document, and those parts won’t be affected by theme changes.) Themes are consistent across all Office programs. You can, for example, apply a theme to a Word document and apply the same theme to an Excel worksheet and a PowerPoint presentation, giving them a consistent look and feel.

To apply a theme to the current document, click the Page Layout tab (in Word and Excel) or the Design tab (PowerPoint) and then click Themes, as shown in Figure 6-20. Point to a theme to see a live preview of your document, and click a theme to apply its settings.

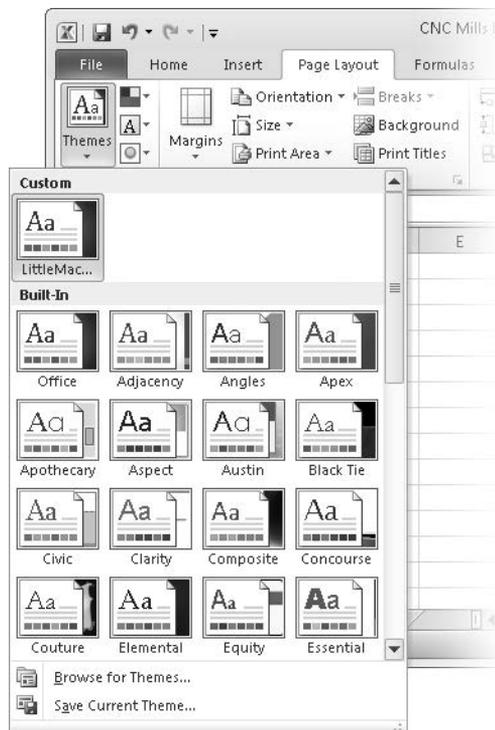
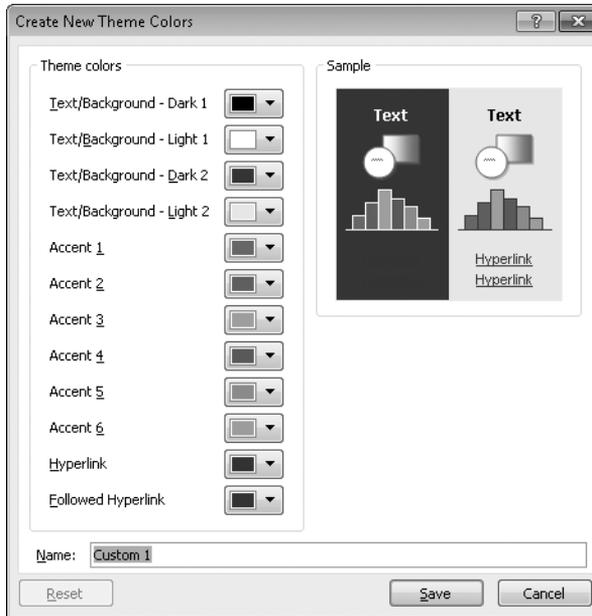


Figure 6-20 The Custom section appears only if you have saved one or more themes.

To see what components constitute a theme (and to change them to your liking), use the other buttons in the Themes group on the Page Layout (or Design) tab.

- **Colors** A theme includes a dozen (usually complementary) colors that are applied to different document elements. You can select one of the 40-odd built-in color collections, or you can click Create New Theme Colors to make a custom collection.



- **Fonts** A theme comprises two fonts: one for headings and one for body text. Select a built-in pairing, or click Create New Theme Fonts to mix your own. Office differentiates between headings and body text based on the paragraph style (Word), cell style (Excel), or placeholder type (PowerPoint).
- **Effects** Select one of the built-in line and fill effects combinations. You can't create your own variation.

After you've made your selections and customizations in each of these three areas, you might want to save this combination as a new custom theme. To do that, click Themes, Save Current Theme. Each theme is stored in its own file, so it's easy to copy the theme file to other computers, thereby enabling consistent appearance throughout an organization. Theme files are stored by default in %AppData%\Microsoft\Templates\Document Themes (C:\Users\username\AppData\Roaming\Microsoft\Templates\Document Themes on a Windows 7 computer with default settings), but you can store them in any folder.

If your custom theme doesn't appear in the Themes gallery after it's been copied to a computer, click Themes, Browse For Themes to locate it.

Inside OneNote 2010

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MICROSOFT'S OneNote is more than seven years old, and yet for many (if not most) Office users it's a complete unknown. That's understandable: After all, in Office 2003 and Office 2007, OneNote was included only in a couple of Office editions, but in Office 2010, OneNote is elevated to marquee status and is part of every edition.

So what is OneNote exactly? In this case, the program's metaphor is absolutely accurate. OneNote really is a digital replacement for a traditional loose-leaf notebook in which you can save class notes, academic research, meeting minutes, or just about anything else you might be tempted to put on a piece of paper. You can type, write, paste, print, snip, clip, and send just about anything to OneNote, which saves each item on a page in a section of a notebook. You can move the pieces around on the page, format text and resize pictures, and arrange text into tidy outlines and lists.

Did we mention that OneNote notebooks are infinitely expandable? You can add new pages and sections, organize pages and subpages, and create as many new notebooks as you can fit in your default storage location. Personal notebooks are stored on your hard drive; you can share and sync notebooks using Windows Live SkyDrive (or, on a home or business network, in a shared folder or SharePoint site).

Even if you already know OneNote well from an earlier version, you'll want to read this chapter carefully. Office 2010 includes some significant new features and capabilities, as well as a new file format.

For more details on the Office 2010 file format and potential issues, see "Choosing the Right OneNote File Format" on page 494.

What's in a OneNote Notebook?

The basic organizational unit of OneNote is the notebook. When you create a new notebook or open a saved one, its icon and name appear in the Navigation bar on the left of the OneNote window, with the hierarchy of sections (and, optionally, section groups) shown in an indented list below the notebook icon and in tabs along the top of the contents pane. Selecting a section displays its contents in the page tabs bar on the right. Selecting a page from that list displays it in the contents pane. To begin adding your own notes, pictures, and web clippings, you can rename the default section and page or start adding new sections and pages of your own.

Figure 15-1 shows an open notebook containing five sections, with five pages in the open section.

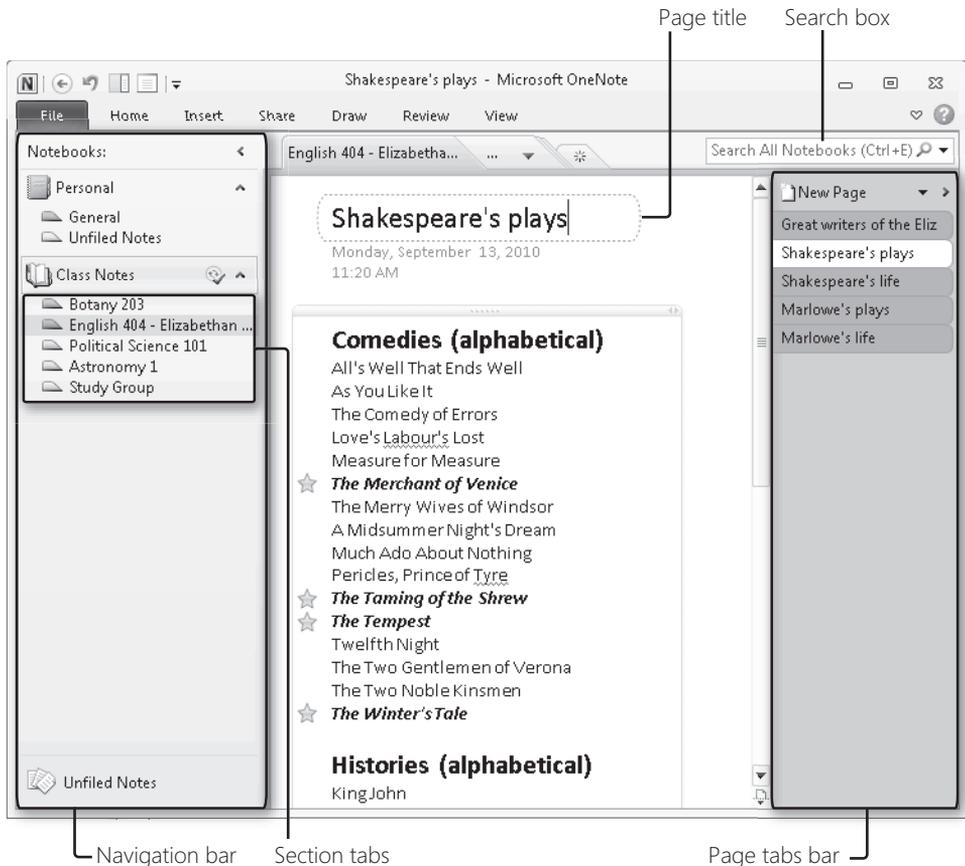


Figure 15-1 This notebook is arranged into five sections, shown in tabs on the left and on top; select a page from the current section using the list on the right.

You can organize your notes in ways that are much more sophisticated than the simple Class Notes notebook shown here. For example, as your collection of notes grows in size and complexity, you can combine sections into section groups and gather a group of related pages together as subpages; although the previous OneNote version also allowed you to create subpages, OneNote 2010 is the first that allows you to collapse them under a parent page. You can also create clickable links that open other OneNote pages, Office documents, Outlook items, or web pages.

For more on how to manage section groups and subpages, see “Expert Organizational Techniques” on page 542. You’ll find details on how to link pages to one another and to external content in “Using Links for Quick Connections” on page 530.

OneNote notebooks are automatically included in the Windows Search index. As a notebook grows in size (and especially when you use multiple notebooks), search becomes not just handy but essential. For the best results, use the search box above the page tabs bar.

You’ll find full details on how to use the OneNote search box in “Smart Search Strategies” on page 534.

There’s no limit on the type of information you can save in a notebook. A partial list of common tasks and activities includes the following:

- Taking notes during classroom lectures and lab sessions
- Organizing online research
- Recording the minutes of a meeting
- Planning a family reunion or vacation
- Creating to-do lists for short-term tasks and long-term goals
- Organizing manuals and warranty information for household appliances

Or anything that strikes your fancy, really.

There’s no right or wrong way to build a notebook or to organize its parts. Your personal preferences dictate how you can manage and use notebooks.

Creating and Opening OneNote Files

One striking difference between OneNote and other Office programs is the absence of a Save button or menu. OneNote does indeed store its work in files, but it handles virtually all of the management tasks for those files in the background. Except in rare circumstances, you should never need to directly manipulate OneNote files.

To create a new notebook, click File, and then click New. Follow the three-step process shown in Figure 15-2 to choose where you want the notebook files stored, and then click Create Notebook to create the new notebook files and begin working immediately.

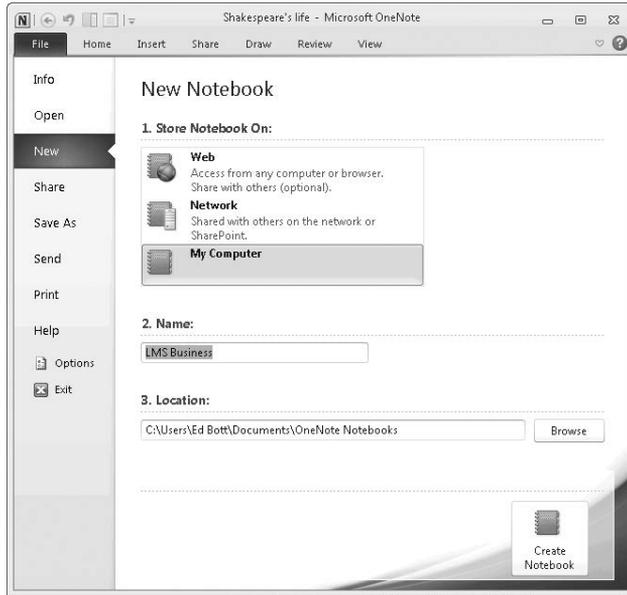


Figure 15-2 The name you enter in step 2 here is used as the display name for your new notebook and as the name of the new folder where its files are stored.

In this chapter, we assume you're creating and storing the new notebook locally (choose My Computer in step 1). The default location for all new notebooks is the OneNote Notebooks subfolder in the Documents folder of your user profile. You can specify an alternative location in the Location box.

The text you enter in the Name box under New Notebook is used as both the folder name and the display name shown in the OneNote Navigation bar. After you create a notebook, you can change its display name at any time without affecting the original folder name. To do so, right-click the notebook name in the Navigation bar and click Rename. That opens a dialog box like the one shown in Figure 15-3, which also allows you to change the location or format of the notebook.

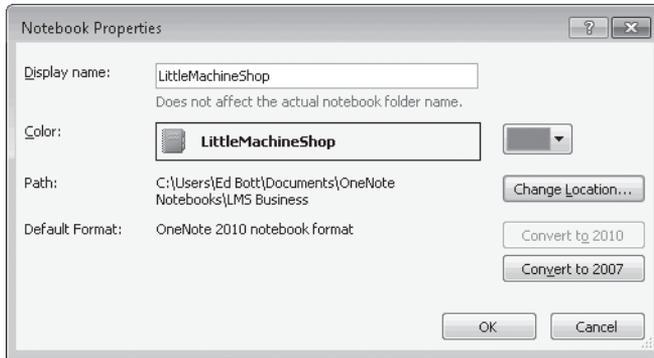
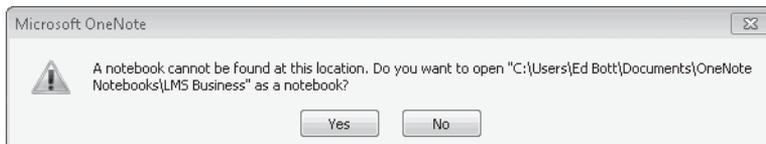


Figure 15-3 Changing the display name of a notebook here does not affect the name of the folder where its files are stored.

So what about the files themselves? Each notebook section is saved in its own file, using the default Microsoft OneNote Section format with a file name extension of .one. If you create a OneNote notebook by clicking File and then New in OneNote 2010, the program creates a tiny file with the name Open Notebook; this file is saved in Microsoft OneNote Table Of Contents format, with a file name extension of .onetoc2. Strictly speaking, the Open Notebook file isn't needed. If you point OneNote to a folder filled with OneNote section files, it will ask you if you want to open the folder as a notebook, as shown here.



If you click Yes, OneNote creates a new OneNote Table of Contents file, using the folder name as the notebook display name and populating it with all section files contained within the folder.

INSIDE OUT

What's the right way to move a notebook?

If a notebook is simply a collection of OneNote section files in a folder, you can move the notebook to a new location just by moving its folder, right? Yes you can, and for a file stored on your local hard drive the results will almost certainly be successful. But for a notebook stored in a shared network location, manually moving files incurs the risk that any unsynchronized changes in that notebook will be lost. To avoid that possibility, we encourage using the official method: right-click the notebook name in the Navigation bar, click Properties, and then click Change Location in the Notebook Properties dialog box.

Choosing the Right OneNote File Format

With OneNote 2010, Microsoft has changed the file format used for OneNote section files. When you create a new notebook in OneNote 2010, your files are automatically saved in the new file format. If you intend to share notebooks with people who are still using OneNote 2007, or if you want to preserve the ability to open those files on another computer using the earlier version of OneNote, you need to explicitly choose the alternative format.

To convert a notebook from OneNote 2007 format to OneNote 2010 format (or vice versa), right-click the notebook icon in the Navigation bar and then click Properties. Click Convert To 2010 or Convert To 2007 (the option for the current format will be unavailable). Note that this conversion can be made only on the entire contents of a notebook. When you make the conversion, the format you choose becomes the new default format for sections within that notebook.

When you move a section from one notebook to another, OneNote automatically converts it to the default format of the destination notebook. If you use Windows Explorer to manually move a section file saved in OneNote 2007 format to a notebook whose default format is OneNote 2010, the older format is preserved, and you see an information bar warning you of potential incompatibilities when you open that section.

If you choose to save a notebook using the older OneNote 2007 file format, the following features are affected:

- The math equations feature is unavailable, and any existing equations are converted to static images.
- Context links (linked notes) and version information are permanently removed.
- Subpages are preserved but can no longer be collapsed in the pages tab list.
- The contents of the OneNote Recycle Bin for that notebook are permanently removed.

In addition, you must use OneNote 2010 format to save a notebook in a Windows Live SkyDrive folder or on a SharePoint site so that you can open and edit the notebook in a web browser using the OneNote Web App.

OneNote 2010 allows you to open a notebook saved in OneNote 2003 format, but that notebook is opened in read-only mode. If you convert a notebook from OneNote 2003 format to either OneNote 2007 or 2010 format, the conversion is permanent and cannot be undone.

You don't need to manually save OneNote files. OneNote automatically saves your work every 30 seconds and when you close a notebook or the program itself. If you've just made a large number of changes and you want to force a save instead of waiting for the next automatic save, press Ctrl+S.

The Save As menu allows you to export or share notebooks, pages, and sections in a variety of formats, as we explain in "Printing, Publishing, and Sharing Notes" on page 566.

Filling a Notebook with Text, Pictures, Clippings, and More

Every time you type, paste, or otherwise insert a new item on a notebook page, OneNote creates a note container for that item. Note containers can hold text, pictures, audio and video clips, handwriting, and clippings from a web page or from the screen. The initial size of the container matches the size of the object you're creating or inserting; if you click and begin typing, a new note container is created immediately and expands in width and depth to accommodate your input.

Note containers are normally invisible. To see the container, move the mouse pointer over its contents, click to select the contents, or position the insertion point within the container. Figure 15-4 shows a note container, with the pointer positioned over the Move handle at the top. Click and drag the handle to move the container and its contents to a new position on the page. Click the Move handle to select the entire container so that you can cut, copy, or delete it and its contents. Click the sizing handle in the upper right corner to make the container wider.

We can't understand why anyone would want to hide note containers permanently, but if you do, there's an option for that: click File, and then click Options. On the Display tab, clear Show Note Containers On Pages.

INSIDE OUT

Merge or split note containers

If you've typed or pasted text into separate containers on the same page, how do you merge them into a single container? Simple: click the Move handle on the second container to select its entire contents. Then, hold down the Shift key as you drag that container into the first one. When you see the contents of the second container snap into position in the first container, release the Shift key. To split text in a single container into two discrete containers, select the text you want to move into a new container and drag it outside the original container. When you release the mouse button, OneNote creates a new container, which you can then work with independently.

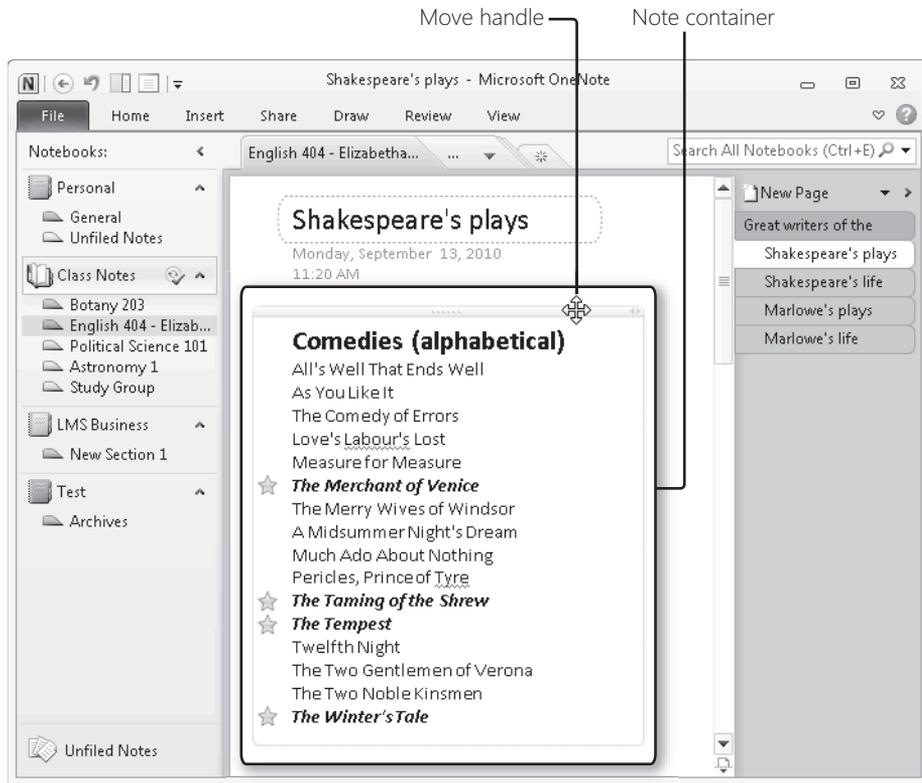


Figure 15-4 Click and drag the Move handle at the top of a note container (shown by the four-headed arrow here) to reposition the container and its contents on the page.

In the remainder of this section, we discuss the specifics of how to work with different types of content that you enter directly or paste from the Clipboard—text, pictures, equations, and ink, for example. But you can also send items directly to OneNote by using the Screen Clipping tool and Send To options in Outlook and Internet Explorer. When you send a web clipping, a screen clipping, or an Outlook item to OneNote, you see a dialog box like the one shown in Figure 15-5. If you choose a section from any open notebook, the item is sent to a new page in that notebook; you can also choose a specific page within a notebook and send the item to that page, where it's placed at the bottom of the page, below any existing content.

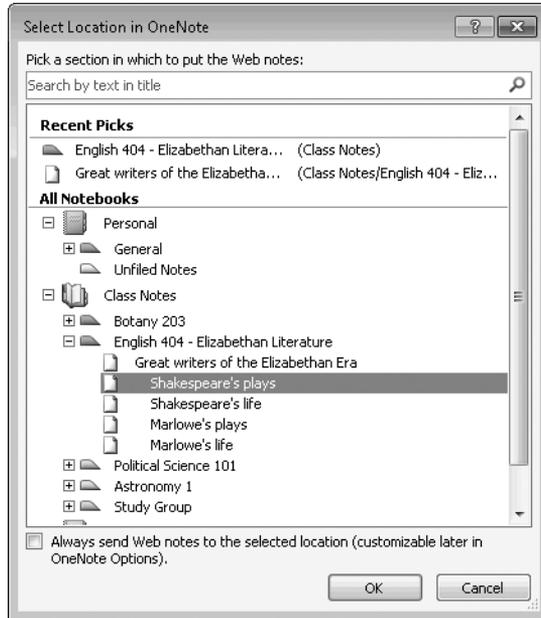


Figure 15-5 When you send an item or a clipping from another program to OneNote, you can specify the destination page or section here.

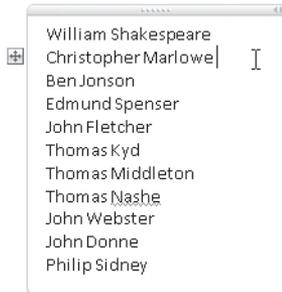
Text

Entering text from the keyboard is the simplest (and probably the most common) way to fill a notebook. Click to position the insertion point on the page, and start typing. (You can also paste text into a page, with or without formatting.) The text you enter or paste appears in a single note container.

OneNote supports basic outlining functions for text. Press Enter to create a new paragraph, and then change the outline level for that paragraph by pressing Tab (or Shift+Tab to promote a paragraph to a higher level.)

You can move any paragraph up or down or adjust its outline level by dragging it. You can also use keyboard shortcuts: press Alt+Shift and then use the Up or Down Arrow key to move the paragraph up or down in the outline; use Alt+Shift and the Right or Left Arrow key to demote or promote a paragraph in the outline. When you move the mouse pointer over a paragraph, a Move button appears to its left. Move the mouse pointer over the button, and the pointer turns to a four-headed arrow; click to select the entire paragraph and

move it up, down, left, or right. In the example shown here, the mouse pointer is to the right of “Christopher Marlowe,” so the Move button appears to the left of that line.



INSIDE OUT

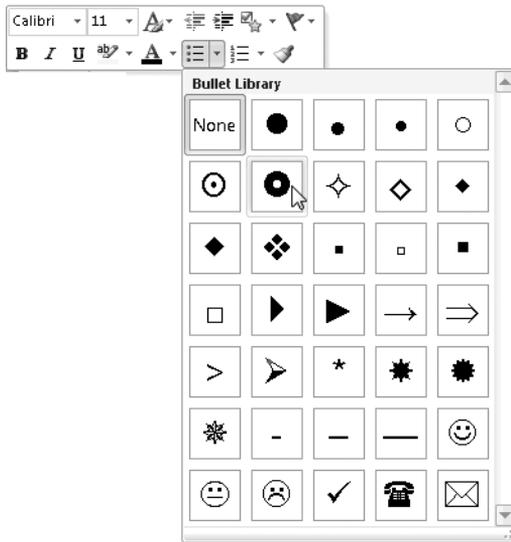
Add a date and time stamp to any text

At the top of every notebook page is a title, and beneath the title is a date/time stamp that shows when you created that notebook page. If you use a notebook page to collect random thoughts over a period of weeks or months, you might want to stamp individual note containers with the date and time. The secret? Before you begin typing a new note, right-click at the point where you want the text to appear. At the bottom of the shortcut menu, click the menu option that lists your name and the current date and time. That information appears as the first line in a new note container, ready for you to begin adding your text. To insert just the current date, use the keyboard shortcut **Alt+Shift+D**. To insert the current time, press **Alt+Shift+T**. To insert both the date and time (without your name), press **Alt+Shift+F**.

Lists

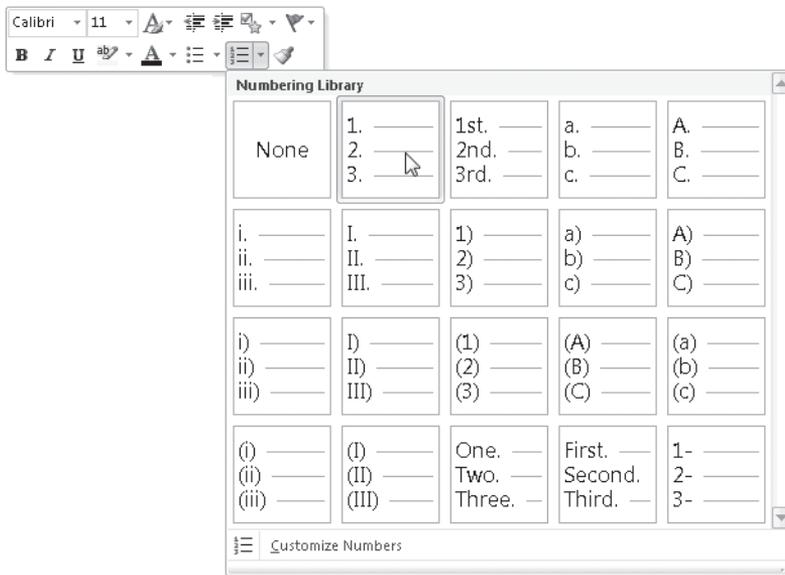
You can format any text on a OneNote page as a list using bullets or numbering. List formatting applies to the current paragraph or, if multiple paragraphs are selected, to all paragraphs in the selection. If you've used list formatting in Word or PowerPoint, you already understand the basics. OneNote adds a few twists to simple lists.

To choose a bullet character and immediately apply it to the current paragraph or selection, click the arrow next to the Bullets button (on the Mini toolbar or in the Basic Text group on the Home tab). The selection of characters in the Bullet Library (shown here) is fixed and cannot be customized.



To format the current paragraph or selection with the most recently used bullet character, click the Bullets button or use the Ctrl+period keyboard shortcut. To automatically add a standard bullet character (a big black dot) at the beginning of the current line, enter an asterisk at the beginning of the paragraph.

Numbered lists work in similar fashion. To begin a simple numbered list, start with a number or letter followed by a period, a closing parenthesis, or a hyphen; then press the Spacebar. You can choose from an assortment of ready-made numbering and outline formats using the Numbering Library (shown next), which is available by clicking the arrow to the right of the Numbering button on the Mini toolbar or in the Basic Text group on the Home tab.



As with automatic list formatting in other Office programs, pressing Enter continues the list formatting in the next paragraph. To end automatic formatting, press Enter twice.

For more details on list-formatting techniques used in Word, see “Working with Bulleted and Numbered Lists” on page 240. For instructions on customizing numbered lists, see “Our Favorite OneNote Tweaks and Tips” on page 572.

Tables

You can add a simple table to any page in OneNote, using its rows and columns to arrange data that doesn’t lend itself to simple paragraphs. OneNote tables offer a basic set of features and formatting options, far simpler than those found in Word or PowerPoint. When the insertion point is within a table, OneNote makes a custom Layout tab available, as shown in Figure 15-6. (The same options are also available if you right-click anywhere within the table.)

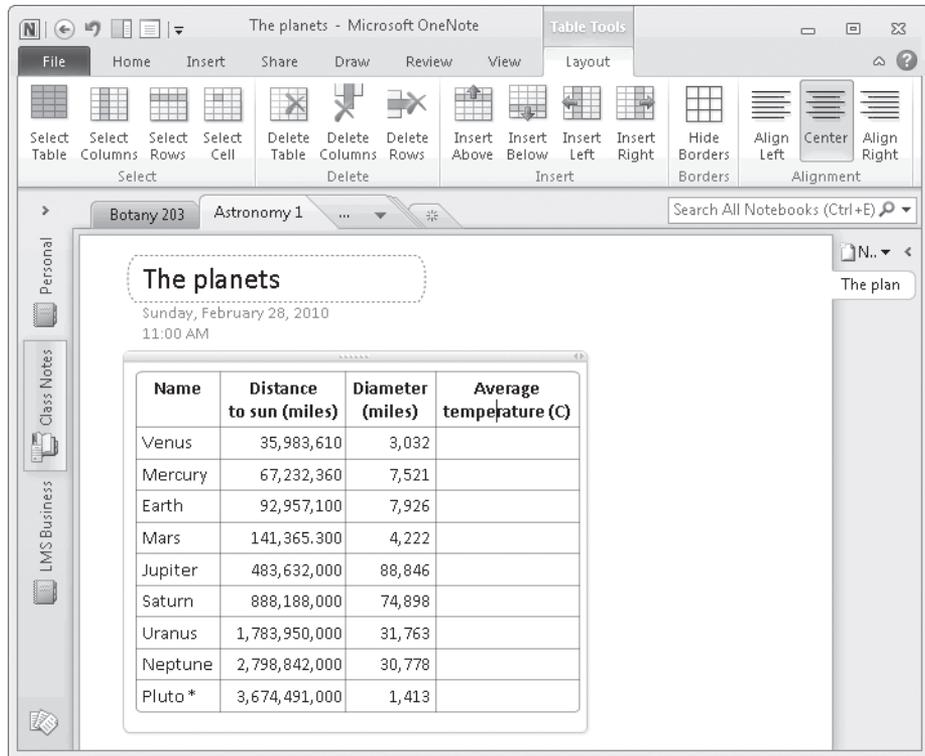


Figure 15-6 The Layout tab allows you to arrange rows, columns, and cells in a OneNote table and align their contents.

To create a table, use any of the following techniques:

- On the Insert tab, click Table and drag the grid to select the number of rows and columns you want.
- Click Insert Table at the bottom of the Table menu and select the number of rows and columns from a dialog box.
- Easiest of all, create a table automatically by typing the text you want to appear in the first cell of the first row, and then press Tab. Continue pressing Tab to create new columns, with or without text, and press Enter to begin a new row.

For more details on how to create and use tables in Word, see “Working with Tables” on page 253.

If you use OneNote tables regularly, you can save some time by learning a few keyboard shortcuts in addition to the Tab and Enter keys. To create a new column to the left or right of the current column, press Ctrl+Alt+E or Ctrl+Alt+R, respectively. To create a new row below the current one, even if the insertion point is in the middle of the row, press Ctrl+Enter. To create a new row above the current one, move the insertion point to the beginning of the row and press Enter. To begin a new paragraph in the same cell, press Alt+Enter.

Pictures

Pictures fit nicely in OneNote pages, either alone or accompanied by text. To add a picture to a OneNote page, you can paste it from the Clipboard or click Picture on the Insert tab and then choose an image file.

What happens next depends on the destination you select. If you choose an empty page as the target for the paste, OneNote drops the picture into a note container, resizing the image if necessary so that its height is under 400 pixels, with the insertion point positioned just below the picture, awaiting your caption. If you insert another picture, it appears in the current note container at the insertion point. However, if you click an empty space, outside a note container, and then insert a picture into a page that already contains at least one item, the pasted picture appears at its original size with no note container. In either case, you can resize the image using handles on the bottom and right sides; use the handle on the lower right corner to preserve the picture's aspect ratio. To resize any image to the full dimensions of the original file, right-click the picture and then click Restore To Original Size.

For a complete picture of how to work with photos and illustrations in Office 2010, see Chapter 6, "Working with Graphics and Pictures."

OneNote treats each picture as if it were a paragraph, so you can move it up and down with text (or other pictures) in a note container. You can also paste or move a picture into a table, as we've done in Figure 15-7. After you insert the first image and resize it to fit the column width and row height, pictures you paste into other cells are scaled accordingly.

OneNote can recognize text in pictures and use that text for searches; we explain how this works in "Our Favorite OneNote Tweaks and Tips" on page 572.

Web Clippings

OneNote and Internet Explorer work exceptionally well together. As you browse, you can collect snippets of text, images, or entire pages for insertion into a notebook page. The mechanics are simple: make a selection (skip this step if you want to save the entire page) and then click the Send To OneNote button on Internet Explorer's Command bar. Alternatively, you can right-click a selection or an entire page and then click Send To OneNote

from the bottom of the shortcut menu. Choosing this option opens the Select Location In OneNote dialog box, where you can specify a section or page as the destination.

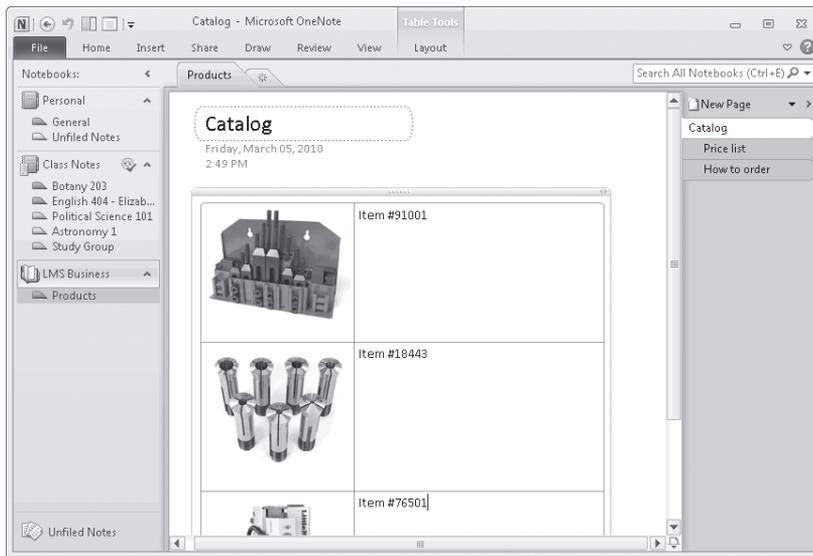


Figure 15-7 You can insert pictures into a table on a OneNote page. After you scale the first image, OneNote handles the remaining images.

TROUBLESHOOTING

A web page doesn't look right when you send it to OneNote

Although the process of sending a web page to OneNote is easy, the results are not always what you'd expect. In particular, heavily formatted web pages often translate poorly onto a OneNote page, with text flowing in an unreadable fashion and tables rearranged haphazardly. If that happens, click the Undo button and try either of these approaches.

- Select the most important portions of the web page and try to send them individually to your OneNote page. You'll lose the overall design, but that might not matter if you're mostly concerned with content.
- Use the Send To OneNote 2010 option on Internet Explorer's Print menu to send the entire page or a selection to OneNote as an image. You lose the ability to copy or edit text on the resulting item, but you are certain to get an accurate (and readable) representation of the page.

If you use a browser other than Internet Explorer, your best option is to select all or part of a web page, copy the selection to the Clipboard, and paste the result into OneNote.

Regardless of the method you choose, OneNote adds a link to the source web page at the end of the item, making it easy to revisit the source when you review your research later.

Screen Clippings

Other Office programs allow you to copy and paste a screen shot from any open window. OneNote offers a more limited Screen Clipping version of that feature.

For full details on how to use screen shots and screen clippings in Office 2010, see “Capturing and Inserting Screenshots” on page 174. To learn how to customize this feature in OneNote, see “Our Favorite OneNote Tweaks and Tips” on page 572.

As with the other Office programs, you can use the ribbon to kick off the process: click Screen Clipping on the Insert tab to select a portion of any window to automatically copy and paste into OneNote at the current insertion point. When you use this option, OneNote temporarily minimizes itself so that you have full access to the rest of the screen; just make sure the window from which you want to clip is visible behind OneNote. Your selection is inserted in the current page at the current insertion point.

Unlike the other Office programs, you can use the Create Screen Clipping keyboard shortcut, Windows logo key+S, to capture a portion of the screen, even if OneNote isn't running. (If OneNote is open, the OneNote window remains visible on the screen, allowing you to capture a clipping from one page and paste it in another.) After you use this option, OneNote displays a variation of the Select Location In OneNote dialog box, shown in Figure 15-8. You can choose a OneNote section or page or use the Copy To Clipboard button to save your selection and use it in another program.

Every screen clipping you add to a page is tagged with the date and time it was taken; if the source is a web page, the tag includes the page name and URL.

Ink

Your keyboard and mouse aren't the only way to put stuff on a OneNote page. The Draw tab includes a full gallery of pens (shown in Figure 15-9) that you can use to draw, write, and highlight information on a page.

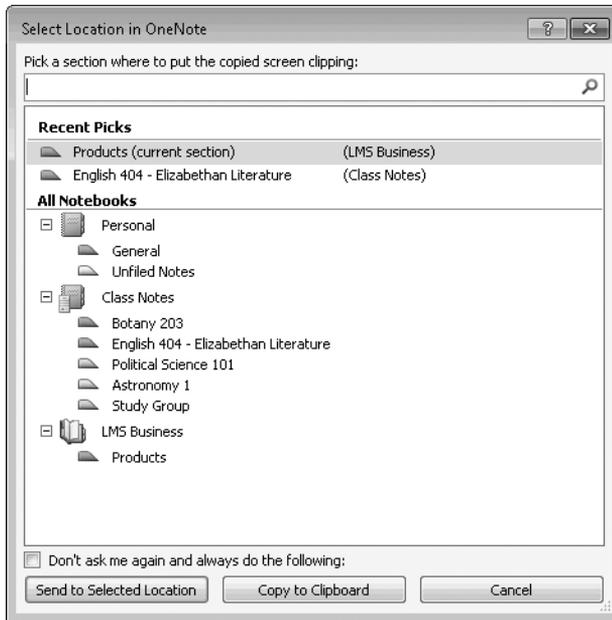


Figure 15-8 Use the Create Screen Clipping shortcut (Windows logo key+S) to copy part of a screen and paste it into OneNote or save it to the Clipboard.

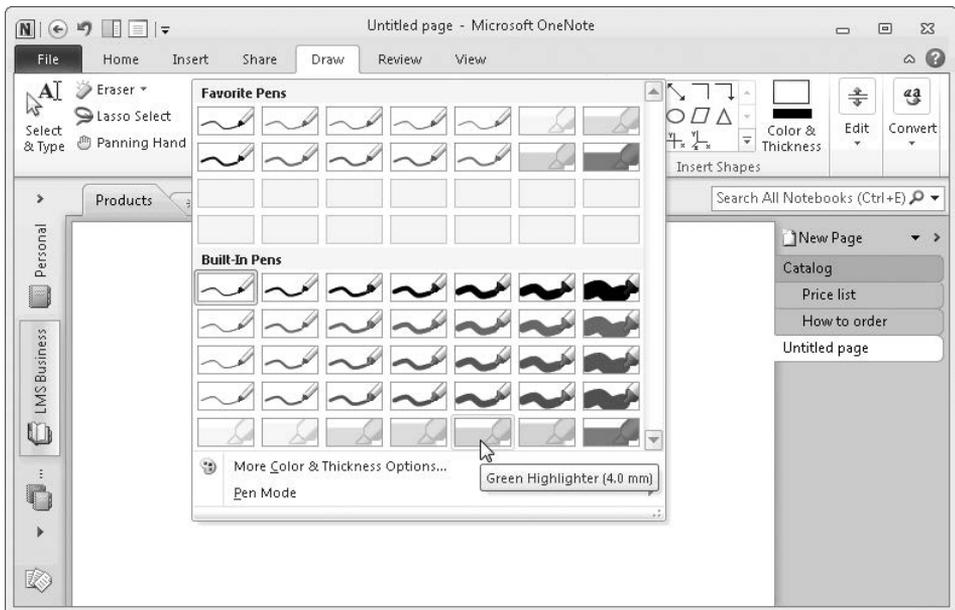


Figure 15-9 Fine-point pens work best for handwriting. The thick markers on the bottom row are ideal for highlighting text.

If none of the built-in pens are quite right, you can customize pens and highlighters, choosing from a variety of colors and thicknesses.

When you select a pen from the Tools group on the Draw tab, the pointer changes to a colored dot or brush whose color and thickness match the pen you selected. Use the pen to draw or write in an unused area of the page, and your ink is captured in a container, where it moves along with any text or graphics in the container. If you use a highlighter, your markup is treated as a discrete drawing and does not move when you move the text. (To highlight text, use the Highlighter button in the Basic Text group on the Home tab, as we describe in “Formatting Text” on page 508.)

To switch from pen mode back to mouse/keyboard interaction, click the Select & Type button at the left of the Draw tab.

If you intend to take handwritten notes or create anything more interesting than stick figures, you'll need a Tablet PC, a touch-enabled PC, or a digitizer and stylus. Although you can add ink using a mouse, the results are rarely satisfactory, especially for handwriting recognition. One noteworthy exception is the set of thick fluorescent-colored highlighters, which work well for marking up printouts.

For more details about how to use ink with Office programs, see “Drawing with Ink” on page 183.

Equations

Engineers and math majors can use the Equation menu on the Insert tab to create valid, editable math equations in OneNote. The tools are identical to those available in other Office applications.

For an overview of math-related features, see “Entering Mathematical Equations” on page 120.

E-Mail Messages and Other Outlook Items

If you use Outlook, you'll find a Send To OneNote button (in the Move group on the Home tab) when you're viewing a mail message in the message list or in a message window. Click that button to send the entire message to OneNote, with the message header (Subject, From, To, and Sent date) in a table and the text of the message itself just below the header.

If you select an Outlook appointment, meeting, task, or contact, you'll see a Linked *Item* Notes button (where *Item* is the item type) with a slightly different button image. Clicking this button allows you to send relevant details from the current item to a OneNote page with a link back to the original item. (If you've already created the item in OneNote, clicking this button returns you to that page.) A Notes section at the bottom of the item allows

you to enter additional text. You can use this feature to keep notes about a meeting or to record details of your history with a contact, as shown here.

Bott, Katy

Wednesday, September 29, 2010
3:31 PM

Contact	Bott, Katy
Picture	
E-mail	katy@bott.com
Home Phone	(555) 743-1234

[Link to Outlook item](#)

Notes

You can create new linked items in Outlook directly from OneNote as well. We discuss the tight connections between the two programs in “Using OneNote with Outlook” on page 547.

File Attachments

You’ll find an Attach File button in the Files group on the Insert tab. When you click that button and select a file from the Browse dialog box, OneNote embeds the selected file and displays its icon and name on the page. The file attachment is an independent copy, not linked to the original file in any way. Changes you make to the original file are not reflected in the OneNote attachment, and vice versa.

Attaching a file to a notebook is a good strategy when you want to preserve the file for historical purposes with your notes, or you want to make sure it’s always available with the notebook, even if it’s deleted from the file system or e-mail message from which it originated. For a document that you want to continue editing, especially with other members of a team, the preferred strategy is to create a link in OneNote to a file stored in a shared network folder or in Windows Live SkyDrive.

For more details about creating links to files, see “Using Links for Quick Connections” on page 530.

Printouts

During installation, OneNote adds a virtual printer to your Windows Devices And Printers folder. When you choose this “printer” as the output from any program (including a web

browser or another Office application), OneNote creates an image of the file as it would appear on paper and inserts that printout on a page you select. You can also create a printout from a file or use the output from a scanner—both options are available in the Files group on the Insert tab. Use this if you want to preserve the formatting of an original document or web page.

There's a subtle but significant difference between the two techniques for adding a printout to a OneNote page. If you use the virtual Send To OneNote 2010 printer, your printout appears on the page you select, without any links to the original document. In addition, you can choose which page (or pages) you want to include on the OneNote page. When you click File Printout on the Insert tab and select the same file, OneNote adds the selected file to the current page as an attachment, with a link to the location of the original document. It then opens the associated program in the background, creates the printout, and inserts the printout below the file attachment.

Formatting Text

Regardless of its original source, any text on a OneNote page can be formatted using the same tools you use elsewhere in Office. The Basic Text group on the Home tab contains common formatting options, giving you the capability to select a font, change font size and color, and add character attributes such as bold, italic, underline, and strikethrough formatting. You'll also find the Format Painter button on the Home tab, in the Clipboard group. Most of these options are available on the Mini toolbar as well.

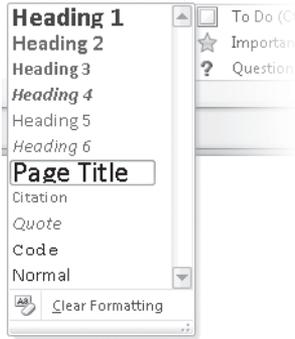
For an overview of common text formatting techniques in Office 2010, see "Applying Text Formatting" on page 123.

As in Word and PowerPoint, you can apply some character formatting without making a selection first. If the insertion point is in a word, for example, and you press Ctrl+B or Ctrl+I (or click the Bold or Italic button), your formatting is applied to the entire word. To apply formatting to a phrase or sentence, you have to select the text first. One formatting shortcut you'll find only in OneNote is a toggle to apply or remove strikeout formatting: Ctrl+hyphen.

The Ctrl+A (Select All) keyboard shortcut works a bit differently in OneNote than it does in the rest of Office. If the insertion point is within a paragraph, pressing Ctrl+A selects the entire paragraph. Press Ctrl+A again to select the entire contents of the current note container, and press the combination once more to select the contents of all note containers on the current page.

If you've used indenting to create an outline, you can select the current paragraph and all its subordinate paragraphs by using the keyboard shortcut Ctrl+Shift+hyphen.

Unlike previous versions, OneNote 2010 allows you to automatically select from a small group of ready-made styles to apply to text. The list, shown here, includes six heading styles as well as predefined styles for page titles and some common types of body text.



Styles on this list are applied to all text in the current paragraph, regardless of whether any text is selected. In addition, Word users will appreciate that some common style-related keyboard shortcuts work just as well in OneNote. Use Ctrl+Alt+1 through Ctrl+Alt+6 to apply the Heading 1 through Heading 6 styles, and use Ctrl+Shift+N to quickly convert all formatting for the current paragraph to the built-in Normal style.

There's no keyboard shortcut for the built-in Page Title style, but it's worth noting that Ctrl+Shift+T jumps to the page title and selects all text there. You can apply any text formatting to all or part of a page title; if you are unhappy with the results, reapply the Page Title style.

The bad news about OneNote styles is that the formatting associated with this list cannot be customized, nor can you add your own styles to the list.

INSIDE OUT

Apply highlighting quickly

If you want portions of text on a page to stand out, use the Text Highlight Color button to apply a fluorescent yellow background (use the drop-down arrow to choose a different color). You can also use either of two keyboard shortcuts to highlight the current selection using the last color you selected: Ctrl+Alt+H or Ctrl+Shift+H. Note that this highlight applies formatting to the text itself and is not the same as the highlighter pen we describe in "Ink" on page 504. That pen creates a graphic image of the highlighter ink that can be used over a printout, a picture, or text.

Navigating in OneNote

At the beginning of this chapter, we described the basic organization of OneNote, which consists of pages arranged into sections within notebooks. You don't need us to tell you how to use the basic navigation tools—section tabs along the left and top of the page contents, page tabs on the right. In this chapter, we focus on some of the more subtle navigation elements, especially keyboard shortcuts and hidden tricks that you'll value when your collection of notebooks grows too big to simply scan.

The best navigation assistant of all is OneNote's search box, which we discuss in detail in "Smart Search Strategies" on page 534.

INSIDE OUT

Zoom in for a closer look

Most programs in the Office family include a status bar that offers, among other tools, a slider to zoom in on or out from the current page. OneNote lacks a status bar, but that doesn't mean it's lacking in the zoom department. The Zoom group on the View tab includes a list of preset zoom settings that range from 25% to 200%. Alternatively, you can use the Zoom In and Zoom Out buttons, which increase or decrease the zoom level in discrete steps from 11% to 477%. The keyboard equivalents are Ctrl+Alt+plus sign/minus sign (on the numeric keypad) or Ctrl+Alt+Shift+plus sign/hyphen (to the right of the numbers on the main keyboard).

Opening and Moving Between Notebooks

Every open notebook has an entry in the Navigation bar. The icon to the left of the display name provides clues about the notebook's status and its location: a notebook with its covers open indicates which notebook you're currently working with, and separate icons differentiate locally stored notebooks from those that are stored in a shared folder and synced to a local copy.

For more details on how notebook syncing works, see "Sharing and Synchronizing Notebooks" on page 561.

Normally, clicking a section in another notebook replaces the page shown in the contents pane with the most recently opened page in the new section. If you want to open a second notebook without losing your place in the current one, switch to the View tab and click the New Window option on the Window menu (or use the keyboard shortcut Ctrl+M). If you're

using Windows 7, you can open a new OneNote window by holding down Shift as you click the OneNote taskbar icon.

If you prefer keyboard navigation to mouse clicks, here's how to switch to a different open notebook. Press Ctrl+G to move the focus to the first open notebook on the Navigation bar. Press Tab to move down the list of open notebooks (use Shift+Tab if you go too far and want to move back). When you see the selection highlight on the notebook you want to open, press Enter.

Working with Sections and Section Groups

OneNote displays the names of all sections for all open notebooks in the Navigation bar. (Click the up arrow to the right of the display name to collapse the list of sections for a notebook; click the down arrow to show the contents of a previously collapsed list.) You can also see a list of section tabs for the current notebook along the top of the contents pane. Click a tab to switch immediately to that section. To move quickly between sections in the current notebook, in order, press Ctrl+Tab (use Ctrl+Shift+Tab to move through the sections in reverse order).

The simplest way to create a new section in the current notebook is to click the Create A New Section button (the asterisk) at the rightmost edge of the section tabs at the top of the contents pane. Alternatively, you can use the Ctrl+T keyboard shortcut. In either case, the new section's default name (New Section 1, for example), is selected so you can start typing immediately to replace it with a descriptive name. To rename a section, double-click its tab and begin typing.

New sections are automatically added to the bottom of the section tabs list. To change the order of sections, drag tabs up or down. You can also drag sections out of one notebook and into another to move them. Hold down the Ctrl key as you drag a section to make a copy in another notebook. If you prefer using dialog boxes for move and copy operations, right-click the section name and choose Move Or Copy from the shortcut menu. Choose a section from the list of open notebooks, as shown in Figure 15-10, and then click Move or Copy to complete the operation.

You can also combine the contents of two sections using the Merge Into Another Section option on the right-click shortcut menu. Choosing this option has the same effect as moving all pages out of the first section and into the second one and then deleting the first section.

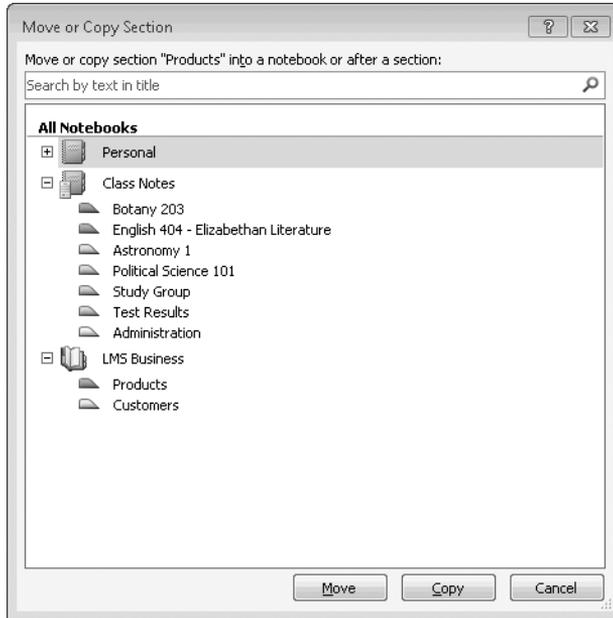
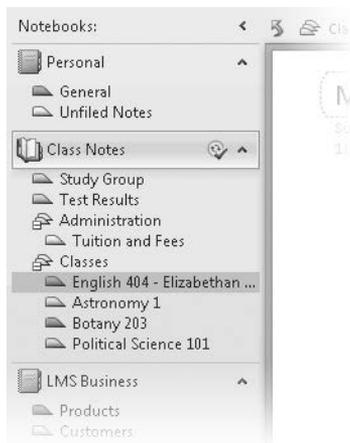


Figure 15-10 To move or copy a section, use this dialog box. You might need to click the plus sign to the left of a notebook name to see its list of sections.

If the number of sections within a notebook starts to become unmanageable, the easy solution is to create one or more section groups. The advantage of section groups is that they can be collapsed and expanded in the Navigation bar. Although you can manually adjust the order of section groups by dragging them in the section tabs list, section groups always appear after sections that are not part of a group, as shown here.



To create a section group, right-click the notebook name and then click New Section Group. Give the new section group a descriptive name and drag sections into it (or create new sections). Note that section groups can be nested within other section groups.

There's nothing magical about section groups. They're actually nothing more than subfolders within the folder that contains the notebook. Creating a section group creates a new subfolder, and moving sections to that section group moves the corresponding OneNote Section files (with the .one file name extension) to that new subfolder.

Working with Pages

The techniques for working with pages are similar to those for working with sections. If you right-click any page name in the page tabs bar, you can use options on the shortcut menu to create a new page, delete the selected page, cut or copy the current page to the Clipboard, or paste a page from the Clipboard to the current section.

To move quickly between pages in the current section, use the keyboard shortcut Ctrl+Page Up (use Ctrl+Page Down to move through all pages in reverse order). To jump to the first or last page in the currently visible set of page tabs, press Alt+Page Up or Alt+Page Down, respectively.

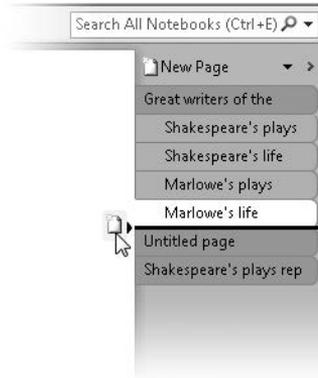
To rename a page, select the page title box and adjust the text there. You cannot directly edit the title text shown on a page tab.

To change the order of pages in a section, drag the page tabs up or down in the page tabs bar, or use the keyboard shortcuts Alt+Shift+Up Arrow/Down Arrow. To move a page to a different section in the same or another notebook, drag the page to the Navigation bar and drop it on a section tab. (Hold down Ctrl while dragging to create a copy and leave the original page intact.) You can also right-click any page and choose Move Or Copy (or use the keyboard shortcut Ctrl+Alt+M) to choose a destination from a dialog box.

Selecting a page involves a few subtle techniques that can be confusing at first. For example, if you click a page tab, the focus shifts to that page, and the insertion point appears on the page at the point where it appeared when you last edited the page. If you're picking up where you left off with a set of meeting minutes or research notes, you can simply start typing. If you click that page icon a second time (or use the Ctrl+Shift+A keyboard shortcut), the entire page is selected, as indicated by a thick blue border around the page in the contents pane. You're then free to cut or copy the page to the Clipboard or press Delete to send it to the OneNote Recycle Bin.

To create a new, blank page, click the New Page button at the top of the page tabs bar, or use the keyboard shortcut Ctrl+N. In either case, your page is added at the end of the current list of page tabs. To add a new page just below a specific page, click its page tab and press Ctrl+Alt+N. To create a new page at a specific location using the mouse, move the

mouse pointer up and down the page tabs bar. As you do so, you'll see a small new-page icon and a small black arrow alongside the page tabs bar. When that arrow points to the location where you want to add the new page, as shown here, click the page icon.



Navigating on a page is a straightforward process, with one twist. Although every page has a paper size assigned to it for printing purposes, pages aren't restricted to a fixed size; instead, they expand as needed, in both width and depth, to fit the content you add. If you plan to add a significant amount of new content in a specific location, you can manually add space to a page. Click the Insert Space button at the left of the Insert tab, and then move the mouse pointer over the page. As you move up or down, the pointer changes to a two-headed arrow. When you reach the spot where you want to add space, click and drag in the direction you want. A large blue arrow, similar to the one in Figure 15-11, shows you the dimensions of the new space you're about to add, with a ghosted image of any existing note containers appearing in their new position.

You can also use the Insert Space button to add space at the left side of a page (click in the left margin and drag to the right) or to remove unwanted white space from a page (click and drag up or drag from the right margin to the left).

When editing a page, you can use any of the following shortcuts:

- To scroll up or down in the current page, press Page Up or Page Down.
- To move to the top of the current page, press Ctrl+Home. To move to the bottom of the note container that's lowest on the page, press Ctrl+End.
- To move down the page, from one note container to the next, press Alt+Down Arrow.

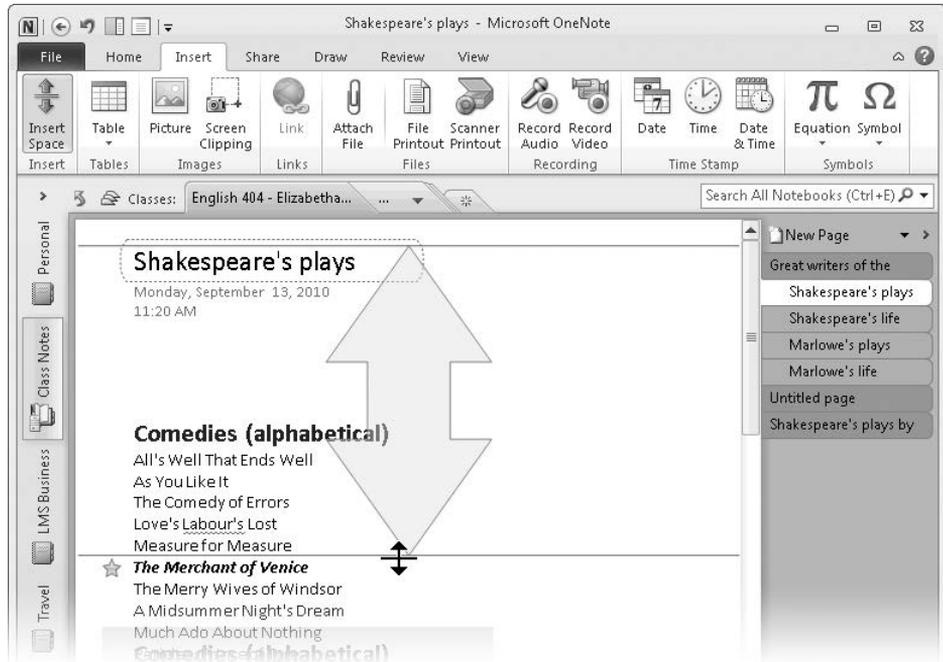


Figure 15-11 Click Insert Space and drag down to add new space above an existing note container.

As in OneNote 2007, you can create subpages that are indented beneath a main page. For notebooks saved in OneNote 2010 format, these subpages are linked to the main page. The group can be collapsed or expanded and can be selected and moved or copied as a group. To create a new subpage below the current page, press **Ctrl+Alt+Shift+N**

To increase or decrease the indent level of the current page tab (or a group of adjacent page tabs), click and drag right or left, or right-click and use the shortcut menu options **Make Subpage** and **Promote Subpage**. You can also use the keyboard shortcuts **Ctrl+Alt+] (right bracket)** and **Ctrl+Alt+[(left bracket)** to increase or decrease the indent.

Using the OneNote Recycle Bin

When you delete a page or section from OneNote, the object doesn't actually disappear for good. Instead, OneNote moves the object to that notebook's Recycle Bin. The Recycle Bin, a new feature in OneNote 2010, is stored in a special folder called `OneNote_RecycleBin`. This folder is added to every notebook you create using the OneNote 2010 file format; if you convert a notebook to OneNote 2007 format, this folder is deleted immediately.

When you delete a section from a notebook, the entire section file is moved to the OneNote_RecycleBin folder. When you delete one or more pages, those pages are moved to the OneNote_DeletedPages file, which is stored in OneNote Section format in the OneNote_RecycleBin folder. To recover deleted pages or sections, right-click the notebook icon in the Navigation bar, and then click Notebook Recycle Bin. In this read-only notebook, you'll see all pages and sections you've deleted in the past 60 days. (An information bar appears at the top of the contents pane to alert you that you're working in the Recycle Bin.)

Figure 15-12 shows the Recycle Bin folder for the Travel notebook. It contains two deleted sections (Czech Republic and Vacation Research) and an indeterminate number of pages in the Deleted Pages section. Note the Read-Only label in the title bar and the information bar that indicates you're working in the Recycle Bin.

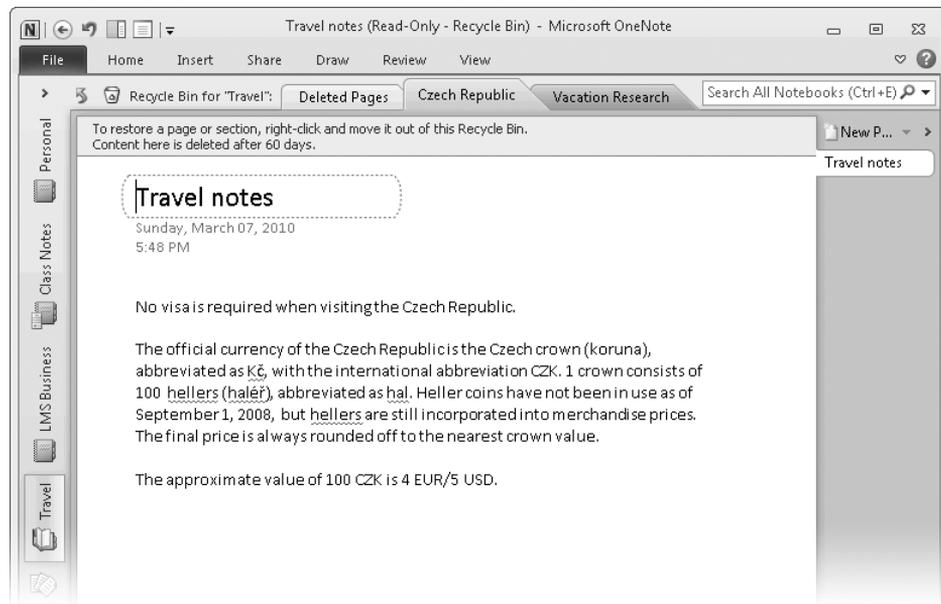


Figure 15-12 To restore a previously deleted section or page, right-click the section tab (above the contents pane) or the page tab, click the Move Or Copy option, and select a destination.

Customizing the Look and Feel of a Notebook Page

By default, every new OneNote page starts out with a bland white background and no adornment. You can change the appearance of a page in a variety of ways—some for purely aesthetic reasons and others, such as rule lines, for practical effect. In this section, we discuss the main customizations you can apply to a page.

OneNote 2010 includes an assortment of templates that incorporate many of the customizations we discuss in this section, and you can save your own templates as well. For details, see “Saving and Using Custom Page Templates” on page 575.

Page Title

The page title box appears at the top of every page in a fixed location, with a date and time stamp below it that (initially, at least) indicates when the page was created. Any text you enter as the title on the page is also used as a label on the page tab.

As far as we’ve been able to determine, there’s no technical limit on the number of characters you can include in a title. From a practical standpoint, however, shorter is better; remember that the main purpose of a title is to provide a label in the page tabs bar.

By default, all page titles are formatted as 17-point Calibri. You can change the font, font size, and color of a title. You can also add hyperlinks, tags, and just about any other type of formatting that’s applicable to text. This sort of custom formatting might be useful if you intend to print a notebook page or save it as a PDF file for sharing; just remember that the page tab label does not reflect any formatting.

You can’t change the position of the date/time stamp just below the page title, nor can you add your own text to it. You can, however, change the date and time. This option is useful if, for example, you create a page in advance of a meeting so that you can keep minutes and want the date and time stamp to reflect the actual starting time. Click the date field to expose a calendar control (like the one shown here) and choose a date. Click the time stamp and use the clock control to choose a new time. Use the Today button to insert today’s date from the calendar. The clock control initially displays the current system time; the list of available alternate times is limited to round values, on the hour and half-hour.



For some pages, such as those that include design sketches or diagrams, you might prefer to have no title. In addition, any Side Notes you create are added to the Unfiled Notes folder with no title. Click Hide Page Title (in the Page Setup group on the View tab) to remove the existing title and date/time stamp and hide the page title box.

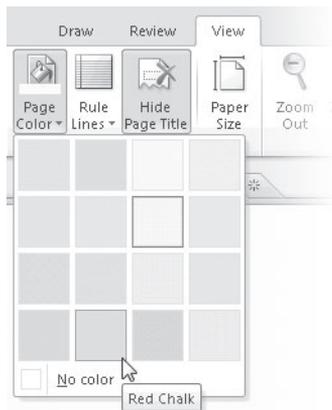
CAUTION!

Don't be misled by the wording of the Hide Page Title button. When you click that button, it permanently deletes the current contents of the page title box and replaces the page tab label with the first recognizable text on the page. If you want to keep the page tab label, copy the page title to the top of the page before "hiding" the title.

We discuss the best way to use the Unfiled Notes section in "Expert Organizational Techniques" on page 542.

Page Color

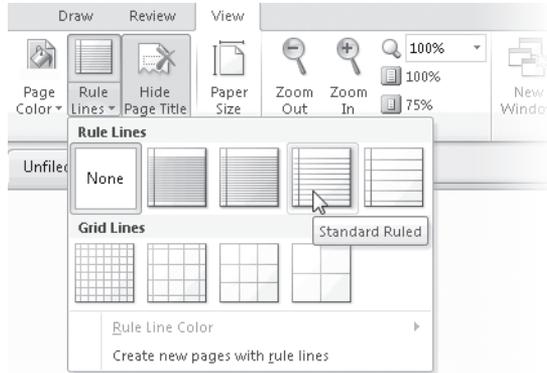
The default background color for every notebook page is white. You can adjust this color to one of 15 pastel alternatives using the Page Color menu on the View tab, as shown here.



To remove the background color from an existing page, click the No Color button at the bottom of the Page Color menu.

Rule Lines

Adding rules or grid lines to a page can help with a variety of note taking and drawing tasks. To add a default set of rule lines (including a vertical red line in the left margin, just like the one on a yellow legal pad), click the Rule Lines button on the View tab. You can change the default lines by clicking the down arrow and selecting from an assortment of rules and grid sizes on the Rule Lines menu.



To adjust the color of rule lines from their default light blue to one of 17 alternatives, use the Rule Line Color list on the Rule Lines menu.

You can show or hide rule lines as needed for a specific task. If you're using a Tablet PC to take notes, for example, you might use rule lines to help keep your notes from creeping up or down the page and then hide them for reviewing later. Likewise, you can use grid lines to initially position images on the page. To toggle the display of rule or grid lines using the keyboard, press Ctrl+Shift+R.

If you prefer to use rule lines for all new pages, you can choose a set of rule or grid lines and then set it as the default. The easy way to accomplish this task is to click Create New Pages With Rule Lines at the bottom of the Rule Lines menu. This has the same effect as selecting Create All New Pages With Rule Lines on the Display tab in the OneNote Options dialog box.

Background Image

In addition to background colors, you can choose a single image to use as the background of a page. This option works best with an image that has been specifically created (or edited) for use as a page background. The ideal image has strong elements limited to the top and left margins and soft or faded image elements in the body of the page, where they won't adversely affect readability of the page contents.

For examples of pages that use background images effectively, see the discussion of page templates in "Our Favorite OneNote Tweaks and Tips" on page 572.

To add a background image, first insert the image on the page and position the picture in the upper left corner, making certain it is not enclosed in a note container. Then right-click the image and choose Set Picture As Background. To remove a background image, first clear the Set Picture As Background option, click to select the picture, and then press Delete.

Paper Size and Margins

The Paper Size setting for a default OneNote page is Auto, which means it can expand in any direction with no limits. That's fine if you're planning to use a notebook for strictly digital purposes. However, if you intend to print one or more pages, you'll want to define paper sizes and margins that match the paper and printer you plan to use.

OneNote includes 14 predefined paper sizes as well as a Custom option that allows you to specify your own dimensions. To edit these settings for an existing page, click the Paper Size button on the View tab. That opens the Paper Size pane on the right side of the page. In Figure 15-13, we've used the Index Card setting to mimic a standard 3-by-5-inch index card; to enhance the effect, we've hidden the page title and added rule lines.

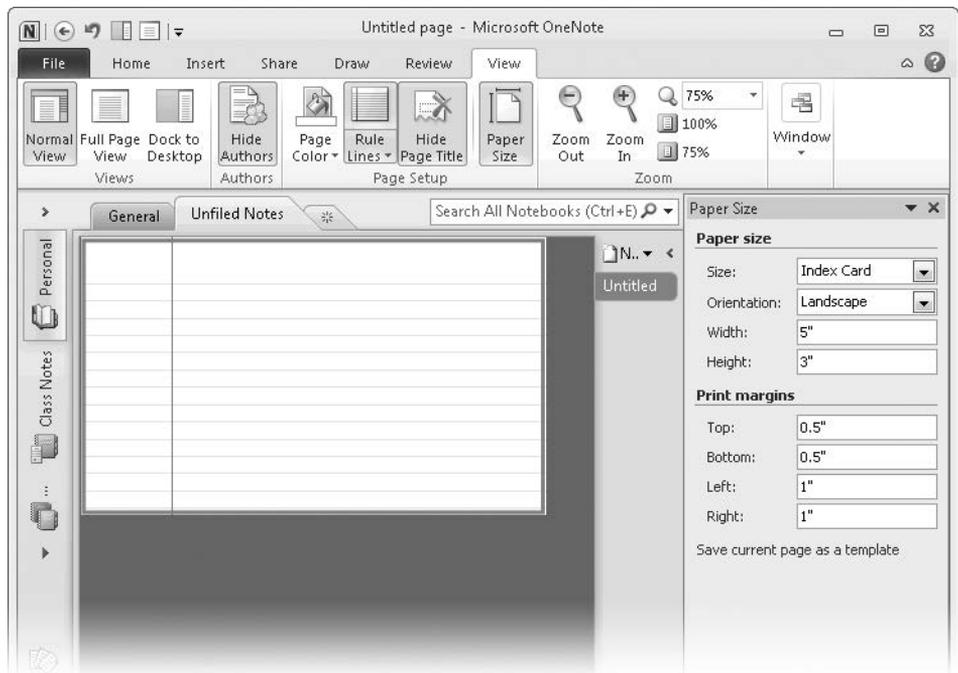


Figure 15-13 These settings allow a OneNote page to mimic a standard 3x5 index card. Save the page as a template to reuse it on new notebook pages.

Personalizing the OneNote Interface

You can customize OneNote's user interface by using the same tools available in the other Office 2010 programs, notably the options to fine-tune the ribbon and the Quick Access Toolbar.

For step-by-step instructions on how to customize these common Office interface features, see “Personalizing the Ribbon” on page 57, and “Customizing the Quick Access Toolbar” on page 62.

The most useful set of personalization options for OneNote reflect the common desire to hide clutter and maximize the workspace as much as possible. This is particularly important when you’re typing class notes or meeting minutes on a notebook or netbook, where screen real estate is severely limited. In that scenario, where access to other pages and sections isn’t necessary, the quickest path to a clean workspace is the F11 key, which toggles Full Page view (there’s also a Full Page View button on the View tab and on the Quick Access Toolbar). In Full Page view, section tabs and page tabs are completely hidden, the ribbon is minimized to just tab headings, and the Quick Access Toolbar remains visible. To toggle back to Normal view, press F11 again. (You can also click the Full Page View button on the Quick Access Toolbar or click the View tab to make its contents visible and then click Normal View.)

For a less drastic solution, you can collapse the Navigation bar and page tabs bar. Click the Collapse Navigation Bar arrow to the right of the Notebooks heading and the matching Collapse Page Tabs arrow to the right of the New Page button above the page tabs bar. With both elements collapsed, the main OneNote window looks like the example shown in Figure 15-14. Note that the section tabs list is invisible and the list of open notebooks is turned on its side. The page tabs bar is still visible, but it’s reduced to its absolute minimum width.

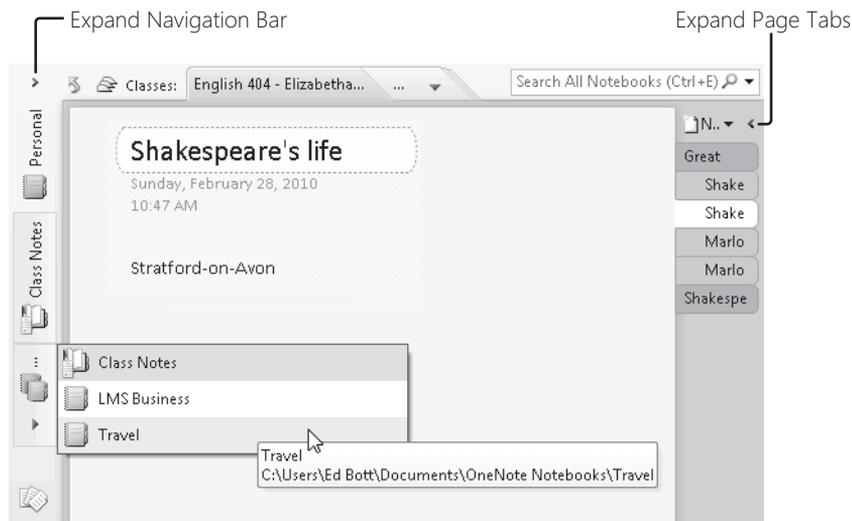


Figure 15-14 Click the arrow at the bottom of the Navigation bar to see additional open notebooks. Use ScreenTips to identify page names and notebook locations.

To restore the Navigation bar and the page tabs bar to their normal widths, click the Expand Navigation Bar shortcut (the arrow just above the first notebook name) and the Expand Page Tabs arrow above the shrunken page tabs bar. In their expanded form, you can adjust the width of either element so that they use less space on a notebook computer or take advantage of the extra desktop real estate on a large monitor. Aim the mouse at the border between either element and the contents pane until the pointer turns into a two-headed arrow, then drag in either direction to widen or narrow the Navigation bar or page tabs bar.

The other personalization options available for the main OneNote interface allow you to change on which side of the screen the Navigation bar, the page tabs bar, and the vertical scroll bar appear. Some OneNote users find it easier to navigate, for example, by moving the page tabs bar to the left side so that the contents of a section appear next to the section tab itself. To adjust this setting, open the OneNote Options dialog box (click File, and then click Options), click the Display tab, and select Page Tabs Appear On The Left.

The other significant personalization option involves the OneNote icon in the notification area. We discuss its settings in more detail in “Customizing the OneNote Taskbar Icon” on page 573.

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About the Authors

Ed Bott is an award-winning author and technology journalist who has been researching and writing about Windows and PC technology, in print and on the Internet, for nearly two decades, with no intention of stopping anytime soon. He has written more than 25 books, all on Windows and Office. His books have been translated into dozens of languages and distributed worldwide. You can read Ed's latest opinions and hands-on advice at Ed Bott's Microsoft Report on ZDNet (www.zdnet.com/blog/bott) and Ed Bott's Windows Expertise (edbott.com/weblog). Ed and his wife, Judy, live in northern New Mexico, in a house full of very lucky pets—Katy the cat, who was plucked from a shelter in the Puget Sound area in 1997, and Mackie and Lucy, who were adopted with the help of English Springer Rescue America (springerrescue.org). All three make cameo appearances in this book.

Carl Siechert began his writing career at age eight as editor of the *Mesita Road News*, a neighborhood newsletter that reached a peak worldwide circulation of 43 during its eight-year run. Following several years as an estimator and production manager in a commercial printing business, Carl returned to writing with the formation of Siechert & Wood Professional Documentation, a Pasadena, California, firm that specializes in writing and producing product documentation for the personal computer industry. Carl is a coauthor of more than 20 books, covering operating systems from MS-DOS 3.0 to Windows 7 and productivity applications from Microsoft Works 3 to Office 2010. In a convergence of new and old technology, Carl's company now operates a popular website for hobby machinists, littlemachineshop.com. Carl hiked the Pacific Crest Trail from Mexico to Canada in 1977 and would rather be hiking right now. He and his wife, Jan, live in Southern California.