

MANAGING OFFICE FILES AND FORMATS

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THE NEW FILE FORMATS IN OFFICE 2007

If you want to become an Office master, you need to become an expert in file management. Without a sensible file-naming strategy and a clear understanding of where and how Office stores files, you'll quickly be overwhelmed by the sheer number of files that Office programs generate.

Fortunately, Office 2007 integrates well with Windows Explorer, the essential file management tool used throughout the operating system. The common Open and Save As dialog boxes used throughout Office act like mini-Explorer windows, and unlike previous Office versions, the Places bar at the left of these dialog boxes is identical to the one found in other Windows programs.



What is absolutely new in Office 2007 is the use of an XML-based file format. It's officially called "Microsoft Office XML Format" and applies to all documents created in Word, Excel, and PowerPoint. In the next section, we discuss what the advantages are of this new file format and then later on we talk about how to interoperate with older documents.

UNDERSTANDING AND CHOOSING FILE FORMATS

Before we go over the different files themselves, let's discuss what the benefits are to the new file formats. Here are some of the ones that Microsoft documents:

- **Compact files**—Your files are compressed automatically and can, at times, be between 50 and 75 percent smaller. Basically, a zip format automatically zips the document when you save it and unzips it when you open it again. So, when you send files over email, they are automatically smaller in the new Office XML format without any new utilities needed. Smaller files mean less disk space used on your hard drives, and it also means less bandwidth utilized when files are accessed over the Internet or within your internal network.
- **Damage recovery improvements**—Files are saved in a component-oriented structure. Components are tables, charts, images, or document metadata, for example. So if your table or chart becomes corrupted, this won't affect your ability to open the entire document.
- **Safer Office XML files**—Files saved with the default "x" ending (such as .docx or .pptx) cannot include VBA macros or ActiveX controls. There is another file type, as you can see in the next section, that can contain these macros, but they have an "m" ending (such as .docm or .pptm). This means that you have a sense of safety from these types of macro and ActiveX problems that creep into your network. And antivirus software can easily identify which documents might be problems by the extension alone.
- **Metadata removal**—All the little document properties and comments, for example, that might be personal information or company-only information can now be removed from your documents. You can use a tool called the Document Inspector, which you can configure to search for and remove metadata before sharing that document with another department or others outside your company.

- **Integration**—Saving documents in an open XML format allows other applications to utilize that data. To open an Office file, all you need is a Zip tool and an XML editor.

After all these years, you may be wondering why Microsoft would make this change to an entirely new format—especially one that will absolutely make your newer documents inaccessible from earlier versions of Office. Several years ago, Microsoft made a commitment to the XML industry standard. Office 2003 showed that commitment by including the capability to save files as XML. This is the next step in that move toward an open format and toward handling customer requests for the capability that XML will afford their documents.

You may be wondering what the difference is between the XML in 2007 and the one provided in 2003; the 2007 version includes the zip capability we mention earlier and the modular structure for components of the document.

OFFICE 2007 FILE FORMATS AT A GLANCE

The following tables give a list of all the different file extensions for Word 2007, Excel 2007, and PowerPoint 2007. You can find this list within Microsoft help files, either online or within the integrated online help from any of the Office applications. This chart, however, includes the file formats for the backward-compatible side to Office 2007, which we discuss in a future section. Notice that the new extensions have four letters.

WORD 2007

Type of File	Extension
Document	.docx
Macro-enabled document	.docm
Template	.dotx
Macro-enabled template	.dotm

In addition to these new formats, Word will support opening and saving .doc and .dot files for backward compatibility, along with other options such as .htm files.

EXCEL 2007

Type of File	Extension
Workbook	.xlsx
Macro-enabled workbook	.xlsm
Template	.xltx
Macro-enabled template	.xltm
Non-XML binary workbook	.xlsb
Macro-enabled add-in	.xlam

In addition to these new formats, Excel will support opening and saving .xls and .xlt files for backward compatibility, along with other options such as .htm files.

POWERPOINT 2007

Type of File	Extension
Presentation	.pptx
Macro-enabled presentation	.pptm
Template	.potx
Macro-enabled template	.potm
Macro-enabled add-in	.ppam
Show	.ppsx
Macro-enabled show	.ppsm
Slide	.sldx
Macro-enabled slide	.sldm
Office theme	.thmx

In addition to these new formats, PowerPoint will support opening and saving .ppt and .pot files for backward compatibility, along with other options such as .htm files.

ACCESS 2007 FILE FORMATS

Access 2007 comes with a new file format as well. Now files will have the .accdb file extension. This is more than a simple extension change, but it comes with a variety of enhancements. Keep in mind, though, that if you save your databases in the .accdb format they will not be compatible with earlier versions of Access. Access 2007 does provide the capability to Open and Save databases in the older .mdb format if necessary. You may be asked if you want to save these databases in the new .accdb format, which is encouraged so you can take advantage of the new features. However, if you need these databases to be available to older versions of Access, do not convert them.

SAVING FILES IN ALTERNATE FORMATS

You have the flexibility in Office to open up one kind of file and save it as something else. For example, you can open up an .htm file in Word and save it as a .docx file if you would like. Or you can open a Word file and save it as a text file (.txt).

To do this in applications with the updated ribbon format, open the document you want to save and then select the Office button, move your mouse over Save As, and then choose the option you need. If you want to save your document in one of the more obscure formats, you can choose Other Formats from Word, Excel, or PowerPoint.

With Access, you can save documents in older formats, as mentioned earlier, but you cannot save an Access database as a .jpg the way you can with a PowerPoint slide.

From applications that didn't get the updated look, you can save your files in different formats by going to the File menu selection and choosing Save As.

PUBLISHING DOCUMENTS AS PDF AND XPS FILES

One of the latest and greatest features of Office 2007 is the capability for many of the applications to save (or publish) a document as a PDF or XPS file. For anyone who has needed to do this in the past, you already know how frustrating it used to be. But with the free add-in, which you have to download first, you can publish within seconds.

For those of you who may not know what PDF or XPS is, here is a quick review. PDF is a file format that is very common because it takes your document and preserves it for sharing. So you don't have to worry that someone will work on it or make changes; it's already set, all formatting included, for others to read. To read PDF files, you need a reader program, and the most popular is Acrobat Reader, which is free from Adobe. XPS is the XML Paper Specification, which is also a format for sharing documents.

In either case, if you want to save a file in PDF or XPS format, you have to download and install an add-in from Microsoft. It's free, though. Go to Microsoft.com and do a search (or go to the Downloads center and look for) "2007 Microsoft Office Add-in: Microsoft Save as PDF or XPS." It's only a 696KB file. Keep in mind that this add-in is going to enable not only Word, but Access, Excel, PowerPoint, Publisher, and Visio to save documents in the PDF or XPS file format.

For applications that have the updated interface, you select your Office button, choose Save As, and then select PDF or XPS. You could also choose it as an option when you are saving a document normally. For applications such as Publisher or Visio, which haven't received the ribbon overhaul, you go to the File menu and choose Publish as PDF or XPS.

After you make configuration choices for your PDF or XPS file, you can choose Publish to complete the conversion.

→ For a deeper look at converting to PDF in Word 2007, see "Secrets of the Office Masters: Saving Files as PDF or XPS" p. 453.

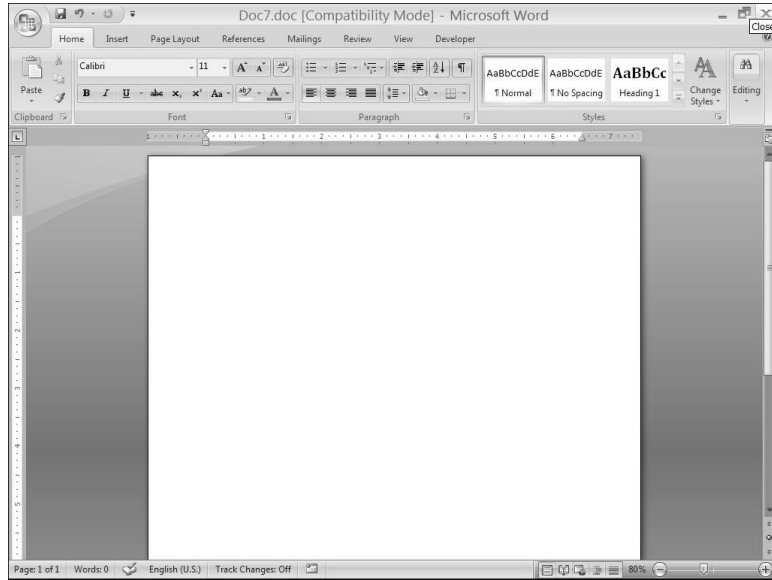
USING OFFICE FILES WITH OLDER OFFICE VERSIONS

When you create a new document in Office 2007, you have to consider a few things. Is the document for you only? If you are going to send it to others, what versions of Office are they running? If you have any doubt that they are using Office 2007, you should save your documents in a backward-compatible file format.

If you open a document that has been created in an earlier version of Word (or if you create a new document and save it in a backward-compatible format), the document will be in Compatibility Mode, and you will see this in the title bar of the document, as shown in Figure 3.1.

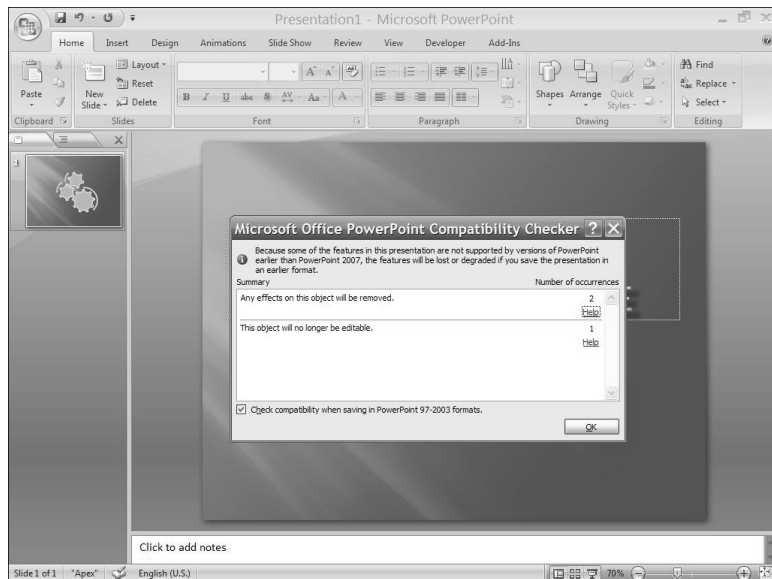
If you have a document that you have created in the newer file format and you know that to share it with others, you have to convert it to an older version, you may be concerned that you will lose some functionality in the document. This is very possible, especially if you have used special features like the new SmartArt tools. To check what functionality you might lose, go to your Office button, and then to the Prepare options. From here you run the Compatibility Checker.

Figure 3.1
Compatibility Mode ensures that 2007 enhanced features are unavailable.



You'll notice in Figure 3.2 that a list of issues will be reported to you so that you can prepare mentally for the lack of functionality, make modifications before saving the document, or choose to avoid the change.

Figure 3.2
The Compatibility Checker gives you a summary of issues with saving files in an older format.



If you would like to work with the newer features, you have to convert your document to the new file format. That will be addressed in the next section.

TIP FROM*EQ & Woody*

We keep saying that you cannot open an Office 2007 document in an older version of Office. This is accurate, by default. However, you can download and install Office Compatibility Packs (<http://www.microsoft.com/office/preview/beta/converter.msp>) that will allow you to open the XML file formats in Office 2000/XP or 2003 applications. If you download this Compatibility Pack and then open the document, you won't have complete functionality. But you will be able to at least open it, edit a few items (not all, depending on how complicated the document is), and save those files. After they are saved, if you open them again in Office 2007, all the functionality will return.

CONVERTING AND IMPORTING FILES BETWEEN OFFICE PROGRAMS

There is an actual Convert button that will help you to move your files into Office 2007. If you have a document that is in Compatibility Mode and you want to convert it, select your Office button and choose Convert. The dialog box shown in Figure 3.3 appears and gives you instructions on moving forward. You select OK, and the document is converted to the new format.

Figure 3.3
The conversion process is simple and the benefits are broad.

**TIP FROM***EQ & Woody*

Initially, after converting your document, you might not notice anything different. Even the .doc extension for your document might be left in the document bar. But if you close the document and open it again, you will see that the document is now in the .docx format.

Now, you might not want to convert the document, but save it as another file altogether (this way, you have a copy of the original format). To do this, choose Save As and select the new file format up at the top.

USING OFFICE PROGRAMS TO CREATE AND EDIT WEB PAGES

Saving your documents as web pages is a very easy task in Office applications. You can select the Office button and hover your mouse over Save As. Then choose Other Formats, find the .htm/.html formats, and save the document. You can see the results if you open the web page in your web browser.

TIP FROM*EQ & Woody*

Word 2007 now has a Blog feature that can help you to post your blog thoughts to the Web. To learn more about this, go to Chapter 13 under the section, "Secrets of the Office Masters: Using Word as a Blog Editor."

SETTING UP OFFICE FILE STORAGE LOCATIONS

Office 2007 works especially well in the typical well-connected office, making it easy to store and retrieve Office files in a variety of locations. You might keep some files on your local hard disk, others on a network file server, and still others on a web server with Microsoft Windows SharePoint Services installed. In an environment this complex, having a well-thought-out storage system is the only way to stay organized.

MANAGE FILES LOCALLY

Microsoft introduced the My Documents folder in Windows 95. The idea was simple: to create a default location for personal data files, making it easier for users to find and back up files they create. In practice, however, the first implementations of this idea were poorly thought out, and most expert Office users ignored the My Documents icon on the desktop—or quickly figured out how to delete it.

Since its first appearance in 1995, the My Documents folder has evolved into a standard feature of Windows. In Windows 2000 and Windows XP, the My Documents icon—located near the top of the Windows Explorer hierarchy, just below the desktop—isn't actually a folder at all; instead, it is a system shortcut that points to a standard location in your personal profile. By default, the Open and Save As dialog boxes used throughout Office applications start out in the My Documents folder, and this system shortcut is also hard-wired to one of the large icons on the Places bar in those dialog boxes.

NOTE

In Windows Vista, the My Documents folder has been renamed Documents. My Computer has also been renamed Computer. In this chapter, we will continue to refer to My Documents, but keep in mind that if you are working on a Vista system, some of these names have changed, but the underlying functionality remains the same.

The My Documents icon on the desktop, in Windows Explorer windows and on the Windows XP Start menu, is actually a *shell extension*—a virtual folder like the My Computer and Network Neighborhood or My Network Places icons, not an actual physical location. Opening this shortcut opens the folder that's registered as the current user's My Documents location. The exact physical location of the My Documents folder varies, depending on which Windows version you have installed and whether it was a clean installation or an upgrade. On most computers running Windows 2000 and XP, the My Documents folder appears in your user profile, normally `C:\Documents and Settings\\My Documents`. On computers running Vista, it resides under `C:\Users\\Documents`.

Advanced Office users might cringe at the name of the My Documents folder, but if you currently store data files in other locations and you're willing to reorganize your storage system, you can substantially increase the odds that you'll find files you're looking for when you need them. Doing so also makes it easier to back up data files.

You can change the default location that individual Office programs use for data files; it's also possible to point the My Documents shortcut to another location. (If the name bugs you,

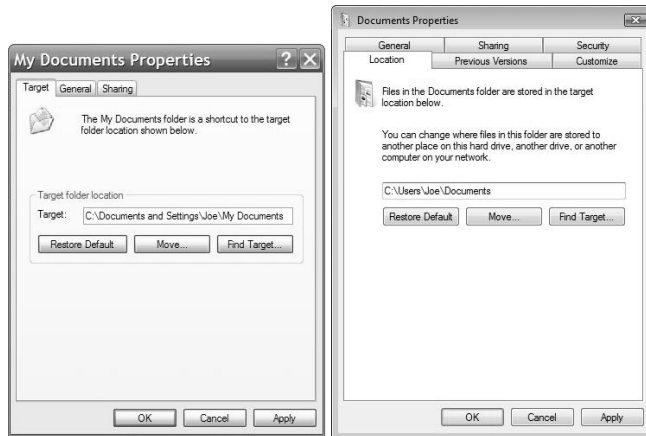
just change it, or you could update to Vista and you might just find that you miss the “My” part. Now you might think, “Well, if they aren’t my documents and this isn’t “My Computer,” then whose is it?)

TIP FROM

EQ & Woody

To move the My Documents folder to a new location, right-click My Documents (or Documents in Vista), go into Properties, and on the target tab (or the Location tab, shown in Figure 3.4), click Move, and then click OK or Apply. If you want to leave all your documents in their current location and point the My Documents folder to a new location, enter the full path to that folder in the Target box and click OK. To rename the My Documents folder, open Windows Explorer, right-click the My Documents icon, and choose Rename from the shortcut menu. Renaming the shortcut doesn’t change the actual name of the folder that it points to.

Figure 3.4
Moving the location of the My Documents (Documents) folder.



Finally, you can change the default working folder for any individual Office application, although the exact procedure is slightly different, depending on the program you’re working with. Why would you want to reset the default working folder? If you’re working on an extended project that requires constant access to files on a shared network folder, for example, you might want to define that location as the default working folder; whenever you choose File, Open or File, Save As, the dialog box will display the contents of this folder. Follow these steps, for example, to adjust the default document folder in Word: go into the Word Options from the Office button. On the Save settings dialog box, notice the Default file location setting. You can choose Browse and find a new location.

Follow the same basic procedure for Excel, PowerPoint, Publisher, and Access, with the following exceptions: Excel and PowerPoint don’t have Browse buttons to find the location you want. Access does have the Browse button, but the settings are not on the Save settings dialog box (which doesn’t exist in Access) but on the Popular settings dialog box.

The default file location setting for each application is independent. If you set Word’s default Documents folder to a location on your network, for example, Excel and PowerPoint continue to open to the default location—typically the local My Documents folder.

Logically, you can save your files wherever you like. The default settings may make life easier, but essentially, when you go to save, you are asked where you want to put that document. At that time, you can determine the location. However, especially for larger projects or projects that require collaboration with others, you will want to put these files up on a server and maybe use a special set of services to assist in collaboration.

MANAGING FILES AND FOLDERS REMOTELY

Office 2007 lets you work with files over a network or on the Web in much the same way that you access files and folders on a standalone PC. If you are connected to a network, contact your network administrator to find locations on the network where you're permitted to read or write files. You should get a network share address for the location, using *UNC syntax* (`\\Server_name\Share_Name\`). Unless the network administrator has restricted your rights, you can create and manage your own subfolders in this location.

Although you can type UNC-style network addresses directly from within Open or Save As dialog boxes, doing so is usually more trouble than it's worth. For easier access, browse to the My Network Places (in Vista, just Network) folder and navigate to the correct server, share, and folder.

Aside from the additional navigation steps, there is no difference between using network shares and using local drives, assuming that you have proper authorization from your network administrator.

Using the UNC path that you are given, if you know how to, you can map a drive letter that's available on your system to a network folder. The concept is this: You have a C: drive, a D: drive, and so on. You can tell the computer that your G: drive (or whatever letter you have available, usually starting from Z backward to make sure it really is available) is now going to be such-and-such server and such-and-such folder (essentially the UNC path of `\\servername\share`). You do this by right-clicking the My Network Places (or Network in Vista), selecting Map Network Drive, and then putting in the information. You can choose to have this connection occur every time you reconnect.

STORING FILES ON THE WEB OR AN INTRANET

Storing files on the Web—whether to a web server or to an FTP server—is almost as simple as working with files on a local network. You can usually open a web-based file by copying the URL from your web browser's Address box and pasting it into the File Name box on the Office program's Open dialog box. On servers that support the Web-based Distributed Authoring and Versioning (WebDAV) standard, you need only the URL for the location (for example, `http://www.example.com/someplace` or `ftp://example.com/incoming`) and logon credentials (a username and password) to save files to that location. In Windows Explorer, collections of documents on a WebDAV-compatible server appear as folder icons in the My Network Places folder. (In previous Windows and Office versions, this feature was known as *Web folders*.)

To save a file to a web server or an FTP site on the Internet or an intranet, choose File, Save As, and click the My Network Places icon in the Places bar. If the list of available network places includes the location you want to use, double-click it and then enter a filename. If the location does not have an icon in the My Network Places folder, enter the full URL for the location and then fill in your logon credentials when prompted.

NOTE

From a technical standpoint, there are almost no differences between publishing to an intranet web server and publishing to one on the Internet. The format of the URL that you use likely will be different—intranet servers are typically identified with a one-word name (such as `http://marketing`) rather than a fully qualified domain name (such as `http://www.example.com`). You'll likely encounter different security issues, including password-protected logons and possibly disk quotas (which limit the amount of disk space a user can fill with web content) on both types of server.

SAVE DOCUMENTS TO A SHAREPOINT SERVER

Some editions of Office XP included an add-on called SharePoint Team Services. An updated version of this software, Windows SharePoint Services, is included with Microsoft Windows 2003 Server. Microsoft sells a more powerful version of this collaboration platform, called SharePoint Portal Server, for use on large networks. With a SharePoint server available (usually on an intranet), co-workers can share and discuss files on a web server, using an attractive web-based front end.

Office 2007 integrates exceptionally well with SharePoint servers. Depending on how the SharePoint administrator has configured the network, you can access SharePoint document libraries directly from Office common dialog boxes. Storing an Office document on a SharePoint server also allows Office 2007 users to take advantage of a number of collaborative functions.

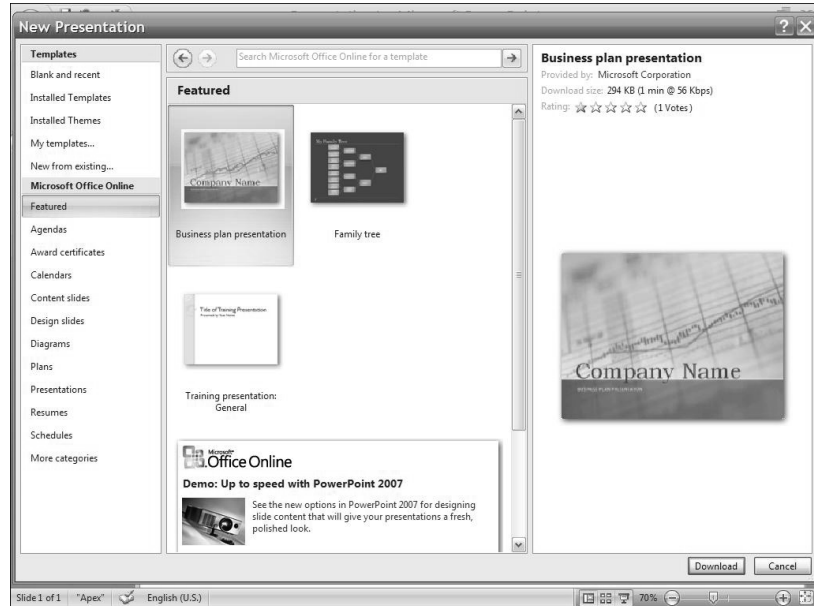
→ For more details on how to use SharePoint services with Office 2007, see, "Office Collaboration and SharePoint," p. 908.

To save documents to a SharePoint site, you use the Publish options located off the Office button and then choose Document Management Server.

CREATING NEW FILES

When you choose the Office button and then select New in an Office 2007 program, the New Document, New Workbook, New Presentation, New Publication, or New File task pane opens (the exact name varies, depending on the Office program in use). As Figure 3.5 illustrates, these task panes are simpler and less cluttered than their predecessors. Choose an option from the Templates block at the top of the task pane to create a blank document (or blog post) or to create a new workbook, database, or presentation from an existing file. There are standard templates, and those that have been used recently show up. Or select from the templates available from Microsoft Office Online, where you can look for custom templates that match the needs of your current project.

Figure 3.5
Every Office program offers a variation of this task pane, which gives you options for creating a new blank file or one based on existing content.



Templates are stored in different locations depending on the template, as noted below:

- The default collection of Office templates is stored in a subfolder that corresponds to the system's current language settings; on a default U.S. English installation, this is %programfiles%\Microsoft Office\Templates\1033. All users of the current system see these templates.
- Each user's custom templates are stored in the location specified for User Templates. By default, this is %appdata%\Microsoft\Templates. The actual location can be changed in Word's File Locations dialog box. You go into the Word Options, to the Advanced settings dialog box, and then to the File Locations button. Choose to Modify the location for these files.
- If you've used Word's File Locations dialog box to specify a Workgroup Templates folder, Office displays templates from this location in the New dialog box as well. If a template in the Workgroup Templates location and one in the User Templates location have the same name, the Office program displays and uses only the one from the User Templates location.

NOTE

The default Office installation does not install all available templates; instead, you'll find shortcuts to some templates in the task pane and the New dialog box. The first time you use one of these templates, Office attempts to install the supporting files.



If you're having trouble finding templates that you've saved, see "Putting Templates in Their Place" in the "Troubleshooting" section at the end of this chapter.

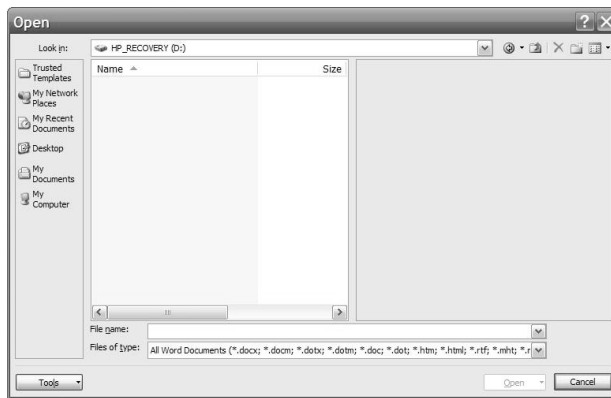
→ For more details on how to install templates and other Office components, see "Adding and Removing Office Features," p. 937.

Although you can manage the contents of template folders in an Explorer window, the easiest and safest way to make new templates available to an Office program is to save the file in Template format.

USING AND CUSTOMIZING COMMON DIALOG BOXES

The Open and Save As dialog boxes used throughout Office have a series of shortcut icons on the left side, called the Places bar (see Figure 3.6), designed to speed navigation through common file locations. As we noted earlier in this chapter, the Office version of the Places bar looks identical to the one available in the common Open and Save As dialog boxes found in other Windows programs. However, with a small amount of effort, you can easily customize the Office version. The default icons are as follows:

Figure 3.6
Customize the Places bar by adding shortcuts to commonly used data folders. To see more choices, use the Small Icons option.



- **My Recent Documents**—Opens the Recent folder, which contains shortcuts to files and folders that you’ve worked with. When you click this icon from within an Office program, Office displays only shortcuts appropriate to the application you’re using.

NOTE

Don’t confuse the Office Recent folder with the Windows system folder of the same name. Office manages a separate Recent folder for each user profile on a system. To manage the Office shortcuts from an Explorer window, enter `%appdata%\Microsoft\Office\Recent` in the Run dialog box or in the Address bar of an Explorer window.

TIP FROM

EQ & Woody

The Tweak UI utility allows you to turn off tracking of recently used files throughout Windows; its settings affect all Office programs. For more information on Tweak UI and to download the utility, go to <http://www.microsoft.com/windowsxp/downloads/powertoys/xppowertoys.mspx>.

To clear the Most Recently Used Files (MRU) list for all Office programs, fire up Registry Editor (Regedit.exe) and navigate to `HKEY_CURRENT_USER\Software\Microsoft\Office\12.0\Common\Open Find`. Delete the entire Open Find subkey to remove all MRU lists for all Office programs. Office will begin building a new set of MRU lists the next time you use an Office program. This procedure is documented in detail in Knowledge Base article 826208, <http://support.microsoft.com/kb/826208>. Although the article itself discusses previous versions of Office (XP and 2003), the same registry key exists for 2007.

- **Desktop**—Opens or saves files on the Windows desktop. Use the desktop as a holding area when you want to create a file and move it elsewhere using Windows Explorer. Using the desktop as a permanent storage area is generally a bad idea because most Office applications have a tendency to create temporary files in the same location as the file you're working with. Those temporary files disappear when you close down the original file.
- **My Documents**—Opens the personal data folder for the user currently logged on. As noted earlier in this chapter, Windows allows you to change the target folder that Office opens when you click this icon.
- **My Computer**—Displays icons for local drives and document folders.
- **My Network Places**—Lets you manage files stored in shared folders on your network, an FTP server, or on WebDAV-compatible servers.

In Open and Save dialog boxes, Office includes two features that make it easier to find a file by name:

- As you type in the File Name box, the AutoComplete feature suggests the first name that matches the characters that you've typed so far. Keep typing, or press Enter to accept the suggestion. Note that the list of files does not scroll as you type.
- If you click in the list of files and then type a character, Office selects the first file that begins with the letter or number that you typed. If you quickly type several characters in rapid succession, the selection moves to the first file that begins with those characters. If you pause for more than a second between characters, this type-ahead feature resets. Note that as you select files in this fashion, Office does not fill in the File Name box.

To adjust the display of files in the Open and Save As dialog boxes, use the Views button. The drop-down arrow lets you choose from a list of views, or you can click the button to cycle through the following icon arrangements:

- Thumbnails, Tiles, Icons, and List views mirror their counterparts in Windows Explorer.
- Details view displays size, file type, and other information. Click any heading to sort the list by that category.
- Properties displays summary information about the selected document in the right half of the dialog box.
- Preview displays a thumbnail version of the document in the right half of the dialog box as you move from file to file in the list. In general, you should avoid this option because of the performance penalty you pay: As you scroll through a dialog box, the program that you're working with has to open each file. Find an import filter, if necessary, and generate the preview. Switch to this view when you want to quickly verify that the file you're about to open is the correct one, and then switch back to List or Details view after peeking at the file.
- WebView uses an HTML template to display files stored in a SharePoint document library.



Some files, especially certain Excel worksheets, can't be seen in the Preview pane. For suggestions on the possible reasons, see "No Preview in Common Dialog Boxes," in the "Troubleshooting" section at the end of this chapter.

TIP FROM

A stylized signature in cursive script that reads 'EQ & Woody'.

To manage files in Open and Save As dialog boxes, select the filename and right-click. Shortcut menus here work the same as they do in an Explorer window. You can move, copy, delete, or rename a file, for example, as long as the file you select is not currently open.

The Places bar can be customized to make it easier and faster to get to frequently used folders. To add your own folders to the Places bar, select the icon for the folder that you want to add, and then right-click in the Places bar and choose to Add or Remove it from the Places bar. (You can't rename or delete the five default locations on the Places bar.) Keep in mind that you select the folder and then right-click in the Places bar in a grey part of the bar.

TIP FROM

A stylized signature in cursive script that reads 'EQ & Woody'.

If you add more icons than can be displayed in the Places bar, small scroll arrows appear at the top and bottom of the list. You can see more icons in the Places bar if you right-click it and choose Small Icons. Put no more than 15 locations in the Places bar; with any more, you'll spend too much time scrolling.

To rearrange folders in the Places bar, right-click an icon that you want to move, and choose Move Up or Move Down.

NOTE

Changes you make to the Places bar apply to all Office programs.

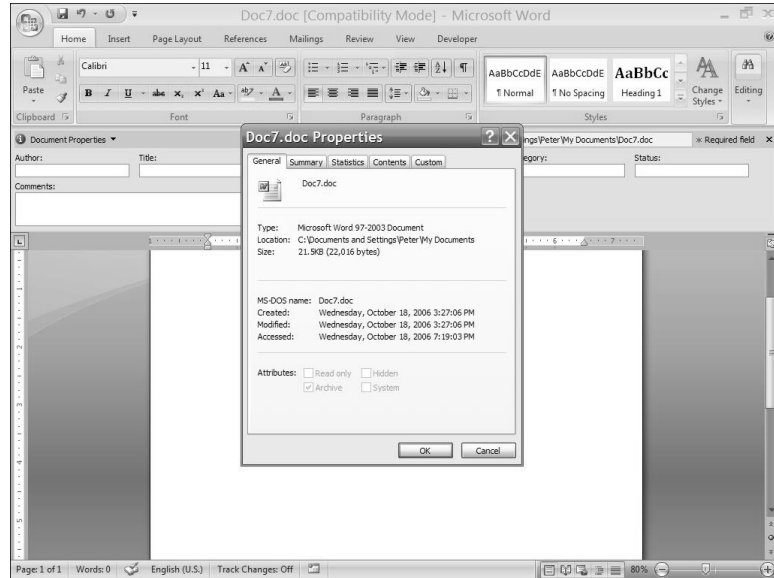
STORING DOCUMENT DETAILS

The Windows file system keeps track of details about each file: its size, when it was created, and when you last modified it, for example. Windows enables you to store extra details about Office file types; these *properties* include the author's name, a title and a subject for the file, and comments or keywords that you can use to search for documents later. A Custom properties sheet lets you track more than two dozen built-in categories or add your own.

Maintaining file properties takes a fair amount of up-front work, but it can have a profound payoff, especially in a networked office where many users share documents.

To view and edit the properties of a file currently open in an Office program, go to your Office button, select Prepare and choose Properties. Initially you will see a subset of properties, but you can select the down arrow and choose Advanced Properties to add more detail (as shown in Figure 3.7).

Figure 3.7
The Properties dialog box displays summary information about Office file types.



The Properties dialog box for an Office file includes the five tabs described in Table 3.1.

TABLE 3.1 OFFICE FILE PROPERTIES

Properties	Description
General	Basic information from the Windows file system: name, location, size, and so on.
Summary	Information about the current file and its author, including fields for company name, category, and keywords. The Comments field is particularly useful when you use Outlook's file management capabilities because the text appears beneath each filename when you turn on AutoPreview.
Statistics	Details about the size and structure of the file, such as the number of words in a document or the number of slides in a presentation; also displays revision statistics and total editing time. This tab is not visible when inspecting file properties from within Windows Explorer; instead, the information is displayed on the Summary tab. This information is frequently incorrect, especially when you inspect it from within an Explorer window. Professional writers and students who rely on these statistics should always inspect them from within the document itself to guarantee that the information is up-to-date.
Contents	The parts of the file: the outline of a Word document, based on heading styles; worksheet titles in an Excel workbook; or slide titles in a PowerPoint presentation. This tab is not visible when inspecting file properties from within Windows Explorer.

Properties	Description
Custom	Twenty-seven built-in fields that you can choose from, including Client, Document Number, and Date Completed. Alternatively, you can add a field of your own. Custom fields can contain text, dates, numbers, or Yes/No information; they can also be linked to Word bookmarks, named Excel ranges, or PowerPoint text selections

NOTE

You can inspect most Office file properties by right-clicking a filename in Windows Explorer and choosing Properties from the shortcut menu. Information in this dialog box is arranged differently from what you see within an Office program, and many properties are not available when the file is open for editing. For data files located on a disk formatted with the NTFS file system, you'll see an additional tab that contains security settings.

For simple projects, you might choose to ignore file properties; in these cases, a descriptive filename can tell you everything you need to know about the file. For more complicated documents, however, adding file details—including keywords and categories—can help you or a co-worker quickly find a group of related data files, even months or years after you last worked with them. Use the Comments box to add freeform notes about a given file.

To enter additional details about an Office file, you must open the Properties dialog box before you save the file. If you use this feature regularly, you can configure Word, Excel, and PowerPoint to display the File Properties dialog box every time you save a file.

SEARCHING FOR OFFICE FILES

The Open dialog box displays a list of all files and subfolders in a single folder. Searching for a specific file can be tedious if the folder is full of files with similar names or if it's organized into many subfolders. To make this task easier, you are going to have to use the operating system integrated search options.

NOTE

In Office 2003, you had the option of using a task pane Search tool. But, in case you are wondering where it is—it has been removed. The reason given was that this feature just wasn't used and the new search features in Outlook 2007 are better, at least for searching email.

WINDOWS DESKTOP SEARCH AND INSTANT SEARCH

A new search tool has been included in Windows Vista (and can be downloaded from Microsoft for Windows XP) called Windows Desktop Search (WDS). This tool provides the following features to enhance your searching capabilities:

- **Fast search capability**—You can now find what you need through your documents and your email in seconds.

- **Multiple file type support**—You can search through various Office documents, images, video, pdf, and so on.
- **Indexing**—The file index is done when the system has idle time so that performance isn't affected.

This search component allows a new feature in Outlook 2007, called Instant Search, to function. This pane is available in Mail, Calendar, Contacts, Tasks, Notes, Folder List, and Journal.

Working with Instant Search will be discussed in the Outlook section of this book.

WORKING WITH MULTIPLE FILES

Word, Excel, PowerPoint, and Publisher allow you to open more than one file at a time. Access does not, and you can't open multiple files directly by using the New File task pane. To open multiple files using the common dialog boxes, follow these steps:

1. Choose the Office button, Open (or press Ctrl+O) to display the Open dialog box.
2. Hold down the Ctrl key and click to select multiple filenames.
3. Click the Open button or press Enter to open all selected files.

To open multiple files from an Explorer window, hold down the Ctrl key and click each icon; then right-click and choose Open.

You can also open any file by dragging its icon from an Explorer window into an Office program window. When you drag an Excel or PowerPoint icon from an Explorer window into an open program window, Office opens the new file in its own window. On the other hand, if you drop a Word icon into an open document window, Word assumes that you want to insert the file at the point where you dropped it. To open the document in a new window instead, drop the icon onto the title bar of the Word program window.

In Office 2007 (as in previous Office versions), each new data file gets its own button on the Windows taskbar, and you can switch between document windows the same way you switch between programs.

SETTING UP AUTOMATIC BACKUP AND RECOVERY OPTIONS

Like its predecessor, Office 2007 comes with “air bags”—a sophisticated set of programs that are designed to make crashes less frequent, to make crashes less devastating when they do occur, and to increase your chances of recovering a document when Office does crash. Following are the important points to keep in mind:

AutoRecover is an option found in most Office programs, whereas AutoSave is in Outlook. These can help you avoid losing your data. The process is quite simple. First, your data is

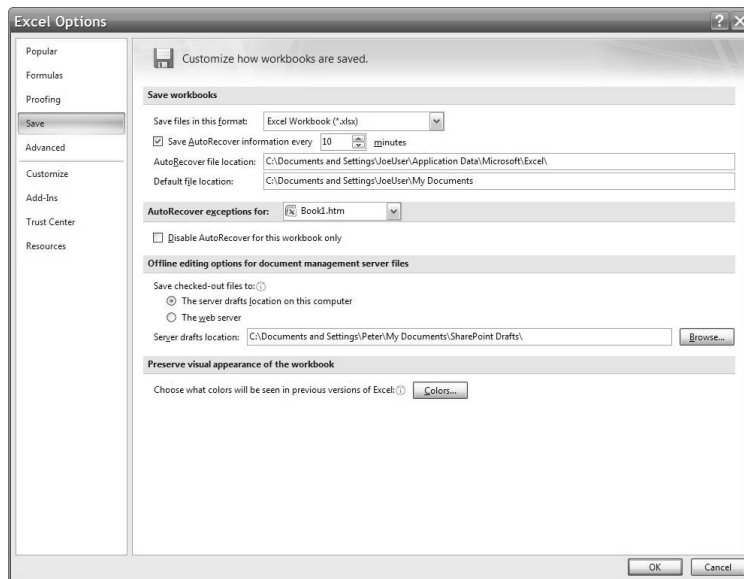
saved automatically if you enable these options. That can really help you out if, for example, you are working for a while and forget to save your document and then the power goes out or your little brother comes along and spitefully turns over the powerstrip (or, although this should never happen, if your Office crashes).

Along with the data itself, the program state is saved. For example, you might have Excel workbooks open and you are working with multiple windows in a specific layout. When Excel opens up again, the windows should be restored in the same working state. Or course, these are ideal restore possibilities and they may not always work exactly as promised.

In some cases, the recovery procedure will actually repair damage to a file when reopening it. In this case, you can use the drop-down menu to open a dialog box that shows you which repairs were made.

To configure these options depends on the application you are working in. If you are setting them for Word, Excel, or PowerPoint, go to Options and to the Save tab, shown in Figure 3.8. There you can configure the number of minutes between saved documents and the location of the AutoRecover files.

Figure 3.8
Configuring
AutoRecover in Word,
Excel, or PowerPoint
2007.



To do the same thing in Outlook, go to the Tools menu, to Options. From there, go to the Preferences tab, select E-mail Options, and then select Advanced E-mail Options. Select the Auto Save Items Every __ Minutes check box and specify the number of minutes you want.

The fewer the number of minutes you choose, the more frequently the recovery file is saved.

TROUBLESHOOTING



PUTTING TEMPLATES IN THEIR PLACE

I created a group of templates and saved them along with the standard Office templates in the %programfiles%\Microsoft Office\Templates\1033 folder. But when I choose File, New, none of my custom templates are visible.

Microsoft designed the folder that stores system templates so that users cannot add templates to it. Instead, you should save your templates to the default User Templates location. The safest way to save templates to this location is one at a time. If you choose Template from the Files of Type list in the Save As dialog box, all Office programs will save your work to the correct location. If you want to add a large number of files to this location, open Word, and under your Word Options on the Advanced settings dialog box, go down to the bottom and select the File Locations button and verify the location of your User Templates to make sure they will be put in the right location.

COMPATIBILITY ISSUES

I just created a PowerPoint presentation, saved it, and emailed it to a friend. My friend says the presentation will not open. What can I do?

Remember that the new Office 2007 file formats do not, by default, allow for backward compatibility. There are a couple of ways you can make it so that your friend can open the document. You could save the document in the 97–2003 file format and re-send it. You could encourage your friend to download the Office Compatibility Pack, which will open documents in the new format. Or your friend could just install Office 2007. It is the future, albeit that's probably the most expensive solution.

NO PREVIEW IN COMMON DIALOG BOXES

I selected Preview from the drop-down menu of views in an Office common dialog box, but when I click a file in the pane on the left, Windows displays the words Preview not available instead of showing my file.

The Preview pane shows a static snapshot of the document as it existed the last time you saved it. By default, this option is not selected because it tends to add roughly 60KB to every file that you create. To make this preview picture available, you must go into your Advanced Document Properties. Select the Office button, go to Prepare, and select the Properties option. Then you select the down arrow to get into Advanced Properties. On the Summary tab, select the Save Preview Picture box. You can do this at any time with a Word document or PowerPoint presentation. However, this option is effective with Excel workbooks only if you use it when you first create the file. Checking this box on an Excel workbook after you've saved it with this option off has no effect at all. To enable the preview, select the Save Preview Picture check box and save the file under a new name. Then close the file and use Windows Explorer to delete the old version and rename the new one with the old name.

SECRETS OF THE OFFICE MASTERS: FOLDER OPTIONS THAT MAKE YOUR LIFE EASIER

In common dialog boxes, trying to use information in the Type column is an exercise in frustration. Making all file extensions visible is a crude solution to this problem, but Explorer windows don't allow you to sort by this information anyway.

So here's a better idea: Regain control of the file types that you use most often, removing the useless Microsoft tag at the beginning of each one and making extensions visible for selected file types, such as HTML documents, where you might want to edit that change on demand.

Open any Windows Explorer window (the My Documents or My Computer folder is a good choice), choose Tools, Folder Options, and then click the File Types tab. Scroll through the list of registered file types until you reach the Microsoft block, and begin editing each file type. Select a file type (Microsoft Office Excel Worksheet, for example) and click the Advanced button. In the Edit File Type dialog box, remove the unnecessary "Microsoft" from the file type name. Click the Always Show Extension box to ensure that .xlsx extensions are always visible (and editable) in Explorer windows.

Repeat this process for other file types, such as Microsoft Word Document and Microsoft Office Document Imaging File. Now, when you use Details view, you'll really see the details that matter.

