

Microsoft Office System Tips & Tricks



Outlook 2003

- 1. Outlook Reading Pane** – View/Reading Pane/ Right. Displays 40% more info on the screen with easier to read vertical orientation.
- 2. Navigation Pane** – Outlook folders and Navigation Pane share space on left. Click & drag horizontal divider bar to adjust buttons visible.
- 3. Grouping Options** – View/Arrange By/Show in Groups to group emails. Date, Conversation, Size, From and other categories. View/ Expand/ Collapse Groups to see more or less.
- 4. Show Attachment Size** – Listed next to attachment icon.
- 5. Download Headers** – Remote users can choose to download headers only and avoid downloading large attachments over slow lines. Tools/ Options/ Mail Setup/ Send Receive/ Choose group & Edit to enable.
- 6. Attachment blocking** – Blocks opening of self-executing attachments with message in Infobar. This can be overridden by Exchange administrator, or attachments can be bound into a compressed (zip) folder
- 7. Virus detection** – Warns user when address book is being accessed, access can be denied or granted for limited amount of time Warns user on attempt to send mail in the background
- 8. Folder Archives** – Archiving allows you to remove older email from your inbox and other folders and store in a local archive folder. Individual Folders can have unique archive settings. Right click on a folder/ Properties/ Auto Archive to set options.
- 9. Mailbox Cleanup** – A single tool that does four important cleanup tasks. Tools/Mailbox Cleanup to do 1) Mailbox size check 2) Find old and large items 3) Archive old items and 4) Empty deleted items
- 10. Favorite Folders** – Add frequently used folders to a Favorites list. Drag & drop a folder from the Mail Folders pane up to the Favorite Folders area. Drag & drop to reposition in favorites. Right click to remove.
- 11. Search Folders** – Create a virtual dynamic folder with content that match search criteria. File/ New/ Search Folder to set criteria. Folder updates as new messages match criteria.
- 12. Save Searches as Folder** – F3 Activates the find toolbar. Save the results of searches by selecting Options/ Save as Search Folder in the Find toolbar.
- 13. Reminders Window** – All reminders are listed in a single dialog box. View /Reminders Window to view or pops up on reminder date. Dismiss individually or Dismiss All. Shift+Click to select multiple reminders and snooze all.
- 14. Color Appointments** – Apply color labels by right clicking appt, Label, choosing from 10 predefined colors. Select Edit Labels to change names. Also select labels in Appointment dialog.
- 15. Auto Formatting of Appointment Colors** – Apply colors automatically based on key words. Edit /Automatic Formatting /Add to create formatting rule, Condition to set criteria. Order of rules determines priority of formatting applied.
- 16. Viewing multiple dates in calendar** - CTRL+ Date in calendar = discontinuous dates
- 17. Keyboard Shortcuts for multiple days** - alt-1 =1 day, alt-7=7 days up to 10 days
- 18. Side by Side Calendars** – View other calendars by opening those you have permission to view. In navigation Pane select with check box if listed or Open A Shared Calendar. Select calendars with check box & list side by side. Cool!
- 19. Junk Mail Filtering** – Tools/ Options/ Preferences/ Junk Email to set options. SmartScreen technology will automatically filter out junk email to Junk Email folder. Select level of filtering and create lists of Safe Senders “White list” and Blocked Senders “black list”.
- 20. Spam Image Blocking** – Control automatic downloading of pictures in HTML email. This may prevent “beaconing” your address to spammers. Tools/ Options/ Security/ Change Automatic Download Settings.
- 21. Flags** – Add six colorful flags to messages to flag for follow-up. Arrange Inbox by flag color or select Follow-Up search folder to see flagged emails.
- 22. Person Names Smart Tag** – Lists icon with person’s online status. Select Tag for actions including sending instant message, adding contact, opening contact, scheduling a meeting and calling the contact.

23. **Rules Wizard** - Tools/Rules & Alerts/E-mail Rules/ New Rule. Create rules from templates or step through wizard - Customize all types of conditional moving, deleting, forwarding of items based on many factors including from, content, subject. Very powerful. Test complex rules carefully. Also sends Alerts to changes in items on a SharePoint Server
24. **Message Recall** - Open sent message in Sent Items folder, Actions/Recall This Message will recall unread copies.
25. **CTRL Key Shortcuts** – CTRL+1,2,3,4,5 will display Mail, Calendar, Contacts, Tasks, Notes.
26. **Surf in Outlook** – View/ Toolbars/ Web to display Web address bar. This turns view pane into a browser yet retains Outlook Navigation Bar.
27. **Remote Outlook** – For remote users attaching to an Exchange Server, Outlook is enhanced to allow for intelligently detecting server connection status and working seamlessly offline, allowing RPC over HTTP to reach the server without a VPN, and allowing browser access to the server with Outlook Web Access which mirrors the full client interface with features including drag & drop, calendar, contacts, tasks and spell check.
28. **Email Notification** – Tools/Options/Preferences/ Email Options/ Advanced E-Mail Options/ Desktop Alert Settings will set options for Alerts to fade in & alert you to new email. Disabled during PPT show.

Windows SharePoint Services

29. **Shared Workspaces** – A powerful new way to create workspaces hosted by a SharePoint web site that allows users to share documents & information. Users can access site info from both the web site or within Office via task panes. Shared info includes documents, lists, calendars, announcements, contacts, tasks, and links. Capabilities include check out of documents and versioning. This is a part of Microsoft Windows Server 2003 or SharePoint Portal Server.

Word 2003

30. **Reading Layout View** –View/ Reading Layout, displays documents in an optimized layout for your screen. Options include one or two pages, document map & thumbnails. Tools/ Options/ General/ Allow starting in Reading Layout to disable on file open.
31. **Task Panes** – Without hiding the current document, task panes allow easy access to many features in Office. View/ Task Pane or Ctrl+F1 to display. Drop down at top of pane lists various functions in Word including New Document, Help, Clip Art, Research, Shared Workspace, Styles & Formatting, Mail Merge, Protect Document and XML Structure.
32. **Custom My Places Sidebar** – In File open dialog, select folder to add, Tools/Add to My Places. Right-click sidebar to choose Small Icons and to adjust order. Resize dialog by grabbing lower right corner. Lists a lot of files!
33. **Folder Contents** – In File Open Dialog point at folder for 2 sec. to see folder size & sample of contents.
34. **AutoCorrect Smart Tag** – Hover over text to view Smart Tag. Click on tag to undo, turn off or set other automatic options.
35. **Diagram Gallery** – Insert & create six diagrams including Org Chart, Cycle, Radial, Pyramid, Vann and Target diagrams. Insert/Diagram.
36. **Office Clipboard** – Copy up to 24 clips from Office apps and IE, paste/delete one or all. Appears as task pane for previewing clips.
37. **Insert Symbol** – Larger symbol viewing, no enlargement required, resizable dialog box, recently used list.
38. **Text Pasting Smart Tag** – After text paste hover over text to view Smart Tag. User can choose to match local formatting or source formatting.
39. **Person Smart Tags** – Informational Smart Tag appears as purple dotted underline. Hover to see Smart Tag. Recognizes person name & allows email, schedule meeting, add to contacts, insert address. Inserted address matches format of name.
40. **Address Smart Tags** – Informational Tag looks up map or driving directions on internet or in MapPoint if installed.
41. **Smart Tag Options** – Set which tags are automatically recognized. Tools/AutoCorrect/Smart Tags or Smart Tag Options from any highlighted Smart Tag. Free developers kit available from Microsoft.
42. **Continue Numbering Smart Tag** – When adding a second numbered list to a document a Smart Tag asks if you want to continue numbering from previous list.

- 43. Formatting Lists** – Format bullets & list numbers by selecting the numbers & apply normal formatting. Click & drag to indent.
- 44. Research Task Pane** – Allows you to quickly reference information online or on your system without leaving Office. Tools/ Research or Alt+Click on word to open research task pane. Default services include Dictionary, Thesaurus, Encyclopedia, Translations, MSN Search and subscription services like eLibrary and Gale Company Profiles.
- 45. Live Attachments** – Documents can be shared as live attachments with one copy in an email and a live copy on a shared workspace on a SharePoint server. Opening the local copy can trigger an automatic update from the web site and vice versa. Email attachments can now be current and up to date. File/ Send to/ Mail Recipient (As Attachment), Attachment Options, Shared Attachments.
- 46. Annotations & Balloons** – A returned document from send for review will show graphical balloons that call out changes & comments by color per user. Hover over balloon to reveal user ID and time of edit. Optional balloon printing. Select which reviewers you want to see. View/ Toolbars/ Reviewing to see options.
- 47. Document Recovery** – If an Office application stops responding or crashes, on restarting it will offer you the Document Recovery Task Pane where you can select from a list of recovered files to keep.
- 48. File Encryption** – File/ Save As/ Tools/ Security Options to set password for opening and editing document.
- 49. Formatting Restrictions** – Tools/ Protect Document/ to set restrictions on formats available to document editors. Users gain access by password or authentication.
- 50. Editing Restrictions** – Tools/ Protect Document/ To set editing restrictions on document. Can select type of editing, and areas individual users can edit. Users gain access by password or authentication.
- 51. Information Rights Management** – Limit who can see a document, copy it, print it and for how long. File/Permission/ Do not Distribute, allows selection of specific users and their associated permissions. Part of Office Professional. Requires authentication from IRM Server or MSN Passport by document owner and document user. IE viewer available for non Office 2003 users.
- 52. Outlook - Do Not Forward** – Limit who can see an email, copy it, print it, forward it and for how long. File/Permission/ Do Not Forward, allows selection of specific users and their associated permissions. Part of Office Professional. Requires authentication from IRM Server or MSN Passport by document owner and document user. IE viewer available for non Office 2003 users.

A Word about XML

- 53. XML** – XML makes it easier to share information. It is an industry standard for moving data between business systems. Office 2003 now supports reading and writing XML data in Word, Excel, Access and InfoPath. This means information previously locked in Office documents can be repurposed throughout the organization. Richest support is in Office Professional.

Excel 2003

- 54. List Management** – Data/ List/ Create List or Ctrl+L applies list tools to lists in Excel. List range is marked with a resizable blue border. Features include AutoFilter headers, Inert Row and Total Row. List can be imported/exported to both XML and SharePoint sources.
- 55. Auto Fill Smart Tag** – Choice of copying, with or without formatting. Click on Smart tag to see options.
- 56. Colored Tabs** – Right click Sheet tabs/ Tab Color to select from 56 designer colors. Colors can be modified.
- 57. Expanded AutoSum** – Adds common functions like average, count, max, min. Click dropdown next to AutoSum button.
- 58. Show #### Values** – See value of cells displaying #####'s due to column width by pointing to the cell.
- 59. Formula Smart Tags** – Alerts to inconsistent formulas. Adjusts sum formula to include adjacent cells. Appears as green triangle in upper left of cell.
- 60. Formula Help** – Typing function & left bracket will show variables names. Insert/ Function for dialog listing all functions descriptions and variable descriptions. Includes Most Recently Used list.
- 61. Text to Speech** – Excel will read back cells as they are entered or as selected. Tools/Speech /Show Text to Speech Toolbar.
- 62. Web Query** – Link to web pages for updated data on demand. Data /Import External Data /New Web Query. Also Option with paste into XL from web page. Selecting Properties in Web Query toolbar allows automatic updating on file open, or at specified intervals.

- 63. Pivot tables** – Create with Data/PivotTable & PivotChart Report, follow wizard. Drag & Drop data headings on report layout. Resulting pivot can be drilled down by double clicking results cells, collapsed by double clicking category cells, and pivoted by dragging heading cells.
- 64. Pivot Charts** – Pivot chart allows graphical view of data. Can be filtered & pivoted in Chart view. Create from Pivot table by selecting Chart Wizard in Pivot Toolbar. Drag & drop fields as desired. Select field dropdowns to filter.
- 65. Office Online Help** – Connects to Office Web for up-to-date information on Office. Features Office use articles, templates, clipart, downloads, and detailed tutorials. Tools/ Options/ General/ Service Options/ Online Content to change settings.

OneNote 2003

- 66. Sections** – Each OneNote section is a separate .ONE file in the My Notebook Folder. File/New to create New sections in the New Task Pane. Right click sections tabs at top to change color.
- 67. Pages** – Exist in Sections. File/ New to create or click on blank New Page tab on right side. Click & drag to move within a section, right click to move to another section.
- 68. Typing Anywhere** – Click & type to enter notes anywhere on a page. Move notes with selection handle on the left. Format text with fonts, color & bold italics etc.
- 69. Note Flags** – View/ Toolbars/ Note Flags to apply flags to notes.
- 70. Custom flags** - Create custom flags with Customize my Flags Task Pane. Format/ Note Flags/ Customize or click on Note Flags toolbar.
- 71. Outlook Tasks** – Send notes to Outlook as Outlook Tasks with Format/ Note Flags/ Create Outlook Task, or click on Note Flags toolbar.
- 72. Note Flags Summary** - View/ Note Flags Summary to see task pane listing all Note Flags in all open sections. List is linked to notes. Options include grouping by flag type: checked, unchecked, questions, etc.
- 73. Search** – Edit/Find to search for text. Task pane lists matches with links to notes.
- 74. Audio Recording** – Tools/ Audio Recording to record audio with your notes. Playback is linked to text. Audio file is stored separate from notes file. Right click OneNote icon in taskbar for quick recording when OneNote is not open.
- 75. Tablet PC** – Ink support built in with various pens, erasers and highlighters.
- 76. Ink to Text** – Ink is searchable and converts to text. Right click on note selection handle/ Convert Handwriting to Text. On paste into Word handwriting is automatically converted to text.
- 77. Office Inking** – Office 2003 supports inking on Tablet PC. Insert/ Ink Annotations. Also ink for email messages and Ink comments in Word.
- 78. Send to Email** – Share notes by emailing in Outlook. File/ E-mail will send notes as HTML content to any recipient and include OneNote file attachment for OneNote users.
- 79. Web Content** – Copy & paste or drag & drop content from web page into OneNote. Web content appears with hyperlink to source page.
- 80. Side Notes** – To open a mini OneNote window click on the OneNote icon in the taskbar.

Visio 2003

- 81. Flow Chart** – Visio templates make it easy to create diagrams. File/ New/ Flowchart to select palette of drawing shapes. Drag & drop to place on the drawing. Dynamic connectors stay connected to shapes as they move & rotate.
- 82. Background** – Drag & drop a background shape onto drawing to add a professional look.
- 83. Color Schemes** – Tools/ Add-Ons/Visio Extras/ Color Schemes to apply color schemes for a unified look.
- 84. Save drawing as Web Page** – File/ Save as web page to save to web so users can see drawings in IE even if they do not yet have Visio.

InfoPath 2003

- 85. Templates** – InfoPath comes with dozens of sample forms to use as templates for designing your own forms.
- 86. Form layout tools** – Step form designers through the process of adding custom elements, like optional sections in a smart form.
- 87. Data Fields & Views** – Form designer can select data sources from schemas, set validation properties, and various views of the form like data entry and data summary.
- 88. Spell Check** – InfoPath marks and corrects spelling errors for good data entry.
- 89. Adding lines** – Smart form is flexible in adding lines, removing lines
- 90. Memo Fields** – Allow for rich text editing like bulleted lists.
- 91. Error checking** – Form check for correctness like Expense item date past Expense report date, and flags the error.
- 92. Sharing Forms** – Forms may be distributed via Web, Email, and Forms Library, notify users when new forms are available.

Office Picture Manager

- 93. Picture Manager** – A handy tool included in Office 2003 for viewing, & editing images. Also does batch conversion of graphics files.

PowerPoint 2003

- 94. Slide Layout** - Task Pane allows one click formatting of slide layout. Choose from many layouts. Task Pane appears with new slide button from toolbar.
- 95. Slide Thumbnails** – Appear in Normal view. Use for rearranging slides with drag & drop.
- 96. Design Templates** – Task Pane lists visual images of templates. Choosing applies template. Task Pane appears with Design button from toolbar.
- 97. Different Backgrounds** – Apply different templates & background to individual slides with Design Template Task Pane. Select slide & choose Apply to Selected Slides in dropdown menu on design preview
- 98. ClipArt** – Search across multiple sources including web sources. View /Task Pane /Insert Clip Art. Rotate and flip any type of image file in a PowerPoint presentation, including bitmaps. Select green handle on graphic object to rotate.
- 99. Animation Task Pane** – Applies new animation effects for Entry, Emphasis & Exit, multiple settings for timing & order. View / Task Pane / Custom Animation. Draw object animation path on slide. In Custom Animation Task Pane, Add Effect /Motion Path. Cool!
- 100. Photo Album** – Quick & easy way to get pictures from camera or disk into a slide show. Insert / Picture /New Photo Album.
- 101. Sound Tracks** – Add music to slide show with Insert/ Movies & Sounds/ Sound from File. To have music play over multiple slides: Slide Show/ Custom Animation. Select music object (speaker) on slide, in task pane select arrow on selected item/ Effect Options/ Effect/ Stop Playing after, enter # of slides.
- 102. Package to CD** – Save show, related files, and PowerPoint Viewer to a CD. Step through wizard to select shows, order, optional password. CD then auto plays on any Windows 98 and greater system even without PowerPoint installed.