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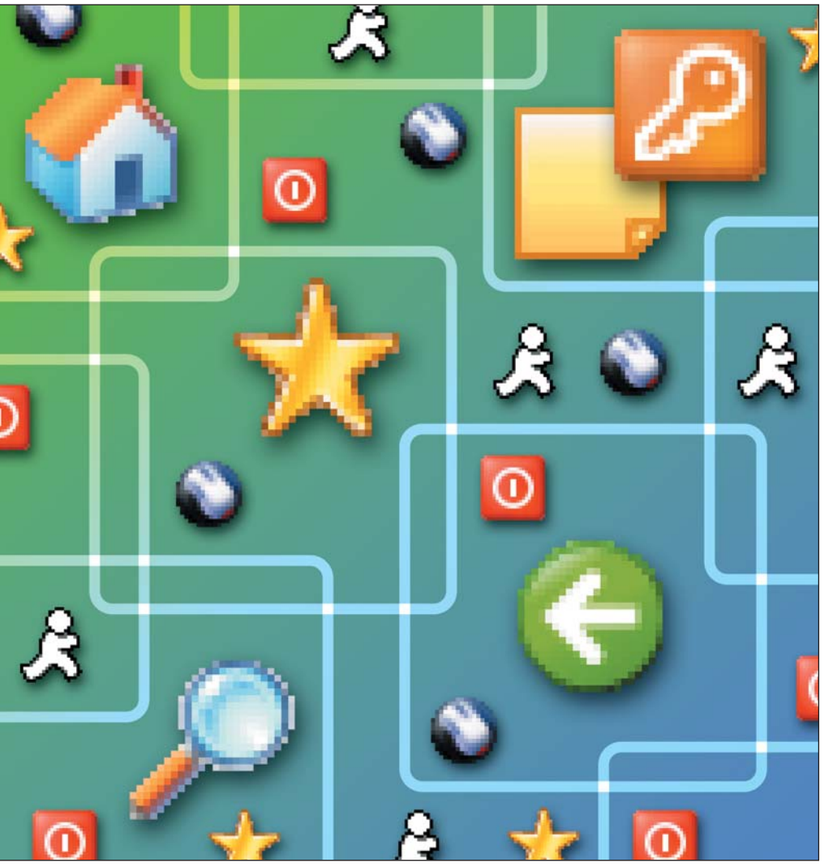
152 Office XP tips & tricks
156 Protect your PC



INDEX

153 Save time by using templates
154 Creating macros: keyboard shortcuts
154 Manage multiple documents
155 Not-so-recently used files
155 Use Smart Tags effectively

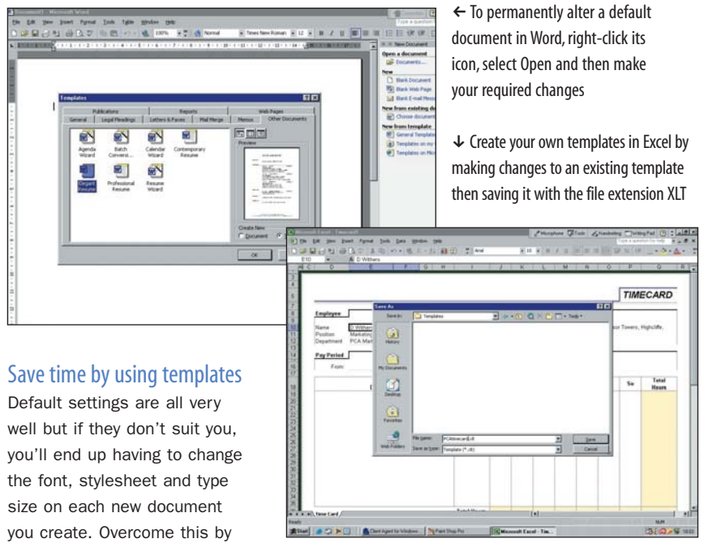
Office XP tips & tricks

Office XP is touted as both easier to use and more customisable than older versions of Microsoft's office suite, but it takes time to learn all the labour-saving ways to tailor Word, Excel and PowerPoint to your needs. Jim Welp shows you how to get more from those everyday applications and build a better Office relationship

When Microsoft released its updated Office suite in the first half of 2001, *PC Advisor* readers greeted its launch with cynicism. Weary of buggy Microsoft software and the huge disk space demands it makes, many readers said they were in no hurry to upgrade to Office XP. Our online poll at the time showed less than half of respondents were intending to migrate anytime soon.

However, Office XP incorporates a number of useful features not found in its predecessor Office 98 and, since the interface is broadly the same as that of the previous version, upgrading shouldn't be too much of a headache. What's more, Microsoft has heeded user complaints about adding bulk rather than functionality, so XP has usability galore.

Since last year's Office XP launch, Microsoft has also released a brand-new version of its Windows operating system which, on the whole, has been favourably received. This will no doubt have prompted some of you to update your system software and, along with it, your office suite too. Next month, we'll be comparing the different office suites and individual applications available. Here, we highlight some of Office XP's features and show you how to make the most of the enhanced user controls it provides.



← To permanently alter a default document in Word, right-click its icon, select Open and then make your required changes

↓ Create your own templates in Excel by making changes to an existing template then saving it with the file extension XLT

Save time by using templates

Default settings are all very well but if they don't suit you, you'll end up having to change the font, stylesheet and type size on each new document you create. Overcome this by creating a template – that is, a boilerplate document containing settings, formatting and styles you frequently use in your most-used application, be it Word, Excel or PowerPoint.

• Word 2002 Whether you regularly have to create letters, memos, legal documents, web pages, faxes or marketing materials, Word offers templates that you can customise. To find these, choose File, New, which will open the Task Pane with the New Document Pane onscreen. Under 'New from template', click General Templates. Select a file document, such as fax, and follow the directions, replacing the boilerplate text with your own.

If you'd prefer to create from scratch a template, which will automatically open every time you open Word, you need to edit Word's blank document template called normal.dot. You can change the default font (to Arial, for example) or point size and your changes will apply to every subsequent document you create.

First, locate normal.dot on your system – its location will depend on your Windows configuration. To find this file, go to the Windows Taskbar, choose Start, Search, For Files or Folders and type normal.dot in the Search field. When Windows displays the file, right-click its icon and choose Open. To change the default font to Arial, choose it in the Font drop-down list, then save the document and close it.

If you don't want all your new documents to default to Arial, create a new template and use that instead. Open a new document, adjust the required settings, then save the file to the Templates folder, making sure to use the DOT file extension.

Click General Templates in the Task Pane to open the Templates dialog box and select the General tab. Click on the blank document to highlight it. This will be the basis for your custom template. Under Create New, in the lower righthand corner of the dialog box, choose Template, ok. Edit the template to suit your needs then save. Your new template will now appear under the General tab. Just click its icon to open a blank document.

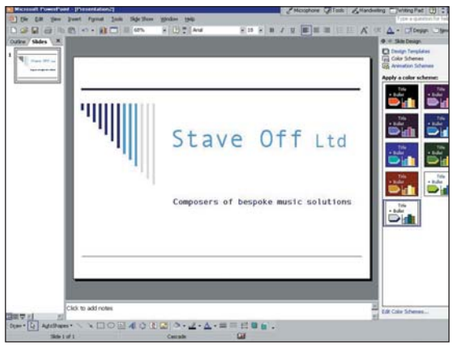
• Excel 2002 Custom templates can also save a lot of time in Excel, particularly if you often create routine worksheets such as invoices or purchase orders. To check out Excel's built-in templates, open the Task Pane by choosing File, New. In the Task Pane's 'New from template' section, click General Templates. In the Templates dialog box, click the Spreadsheet Solutions tab to display the templates that come with Excel. Just like in Word, you can use these as your worksheets, customise them or, if you prefer, create your own templates from scratch from a blank worksheet.

To use an existing worksheet to create your own template, open the Task Pane by choosing File, New. Next, click 'Choose Workbook' from the Task Pane's 'New from existing workbook' section. Find and select your worksheet, click Create New and customise the file as you wish.

To save a new template, whether you've customised an existing one or created it from scratch, choose File, Save As. In the 'Save as type' drop-down list, choose Template (*.xlt). Excel automatically switches it to the Templates folder. Name your template, making sure to keep the XLT file extension, and click Save. As with Word, you can access your template from General Templates on the Task Pane, then click the General tab in the Templates dialog box and double-click the template's icon.

• PowerPoint 2002 To customise PowerPoint templates, go to the Task Pane and click General Templates to open the dialog box. Here, you'll find three tabs: General, Design Templates and Presentations. The Design Templates tab offers a slew of slide designs, while the Presentations tab offers complete presentations, ready for you to fill in the blanks. Simply double-click a design to launch a template.

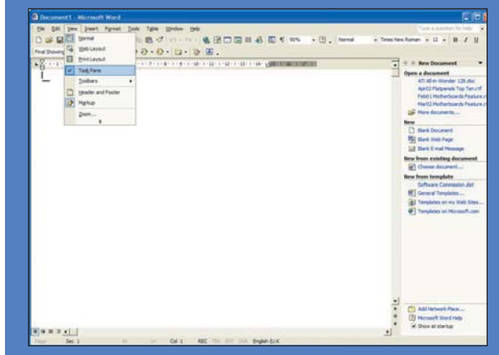
To create a custom template, open the file you want to save as a template by clicking 'Choose presentation' from the Task Pane's 'New from existing presentation' section (or create one from scratch). Choose File, Save As. In the Save as type drop-down list, choose



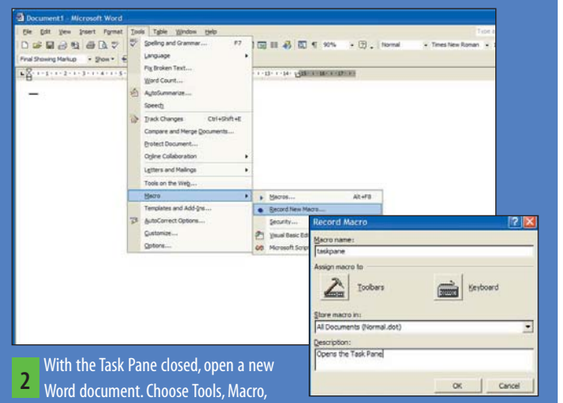
→ Choose from a variety of readymade presentation templates in PowerPoint – simply fill in the blanks for a quick, easy and professional looking presentation

Creating macros: keyboard shortcuts

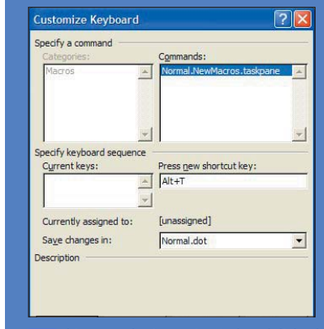
Office XP lets you create macros that perform fiddly or repetitive tasks, then run them whenever you want by clicking an icon or pressing a key combination. There's almost no limit to the kinds of tasks you can automate in Word, Excel and PowerPoint, and the process for recording a macro is very similar in each application. Here we show you how using Word.



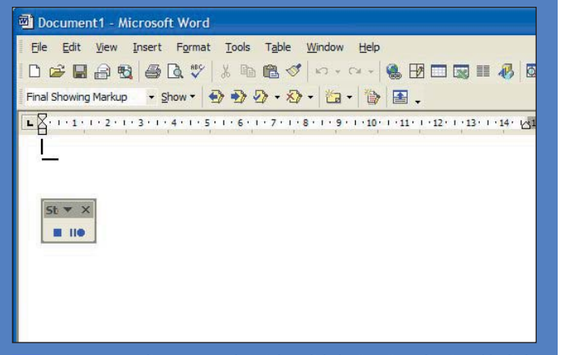
1 To open the Task Pane, choose View, Task Pane and the Task Pane appears on the right. You can also bring up the Task Pane using a three-key shortcut (Alt, V, K). The macro we are creating will simplify this process to Alt, T



2 With the Task Pane closed, open a new Word document. Choose Tools, Macro, Record New Macro. In the Record Macro dialog box, type 'taskpane' under Macro name. Leave the 'Store macro in' list set to All Documents (Normal.dot) and highlight the text in the Description field. Type 'Opens the Task Pane'. Next click the Keyboard icon



3 This opens the Customize Keyboard dialog box. Move the cursor to the Press new shortcut key field and press Alt, T. Leave the Save changes in list set to Normal.dot. Finally, click Assign, then click Close



4 You're now recording, so press Alt, V, K then click the Stop Recording icon (the little square) on the floating Macro toolbar. Word opens the Task Pane and the Macro toolbar disappears. Now, any time you want to open the Task Pane, just press Alt, T

Template (*.pot). PowerPoint automatically switches to the Templates folder. Choose a name for your template, making sure to preserve the POT file extension, and click Save. You'll find your new template on the General tab in the Templates dialog box.

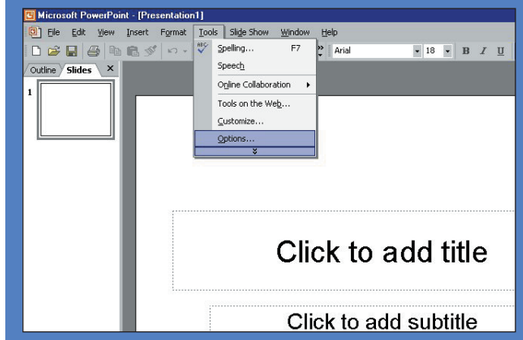
Manage multiple documents

Even after all these years, Microsoft is still grappling with making application and document windows convenient, without cluttering up the joint. Office XP offers more flexibility on how you display documents in windows than previous versions. Depending on which version of Office you upgraded from, you'll be used to viewing either a single Taskbar for Word, Excel and PowerPoint or an extra Taskbar icon for open documents in each.

The default Office XP setting for Excel, PowerPoint and Word is to display a separate icon in the Windows Taskbar for each open document. This tends to be less confusing than using both the toggle Taskbar and the Window menu, but if you routinely work with several documents at once, the Taskbar can get pretty messy. You can change the setting in Word, Excel and PowerPoint by choosing Tools, Options. Select the View tab, then navigate to the Show section of the dialog box and click to turn off the Windows in Taskbar option. You can also try using Ctrl, F6 to toggle between documents, again with Windows in Taskbar turned off. Similarly, switching off this option means you can use the same set of icons, rulers and other tools for multiple documents you've got onscreen at any one time.

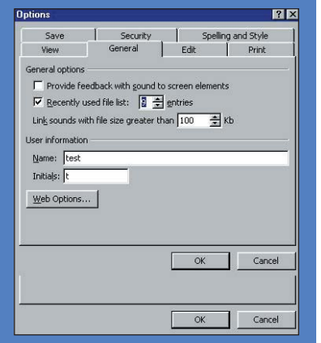
Not-so-recently used files

Office XP has added on a handy feature for retrieving files you've recently opened in Word, Excel, and PowerPoint. You'll find a list of these most recent documents at the bottom of the File menu in each Microsoft application, as well as in the New Document (or New Workbook or New Presentation) Task Pane.



1 By default, the File menu and Task Pane let you choose from the four most recently opened documents. To lengthen this list to nine, choose Tools, Options and click the General tab

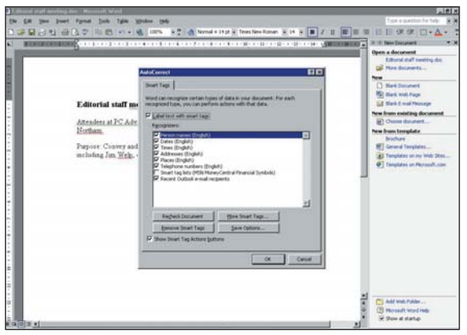
2 In the box next to Recently used file list, type the number of files you'd like your File menu or Task Pane to display. If you don't want recently used files to appear on the File menu or in the Task Pane, uncheck the box. You'll need to open more than four files to notice the change taking effect. You can also retrieve recently used files from any Windows application by selecting Start, Documents, then choosing a file from the list that appears



Use Smart Tags effectively

When Office XP was released, a lot of controversy surrounded Smart Tags because they appeared to direct users to sites and services in which Microsoft had an interest. However, the UK version has (allegedly) fewer Smart Tags and its ability to recognise when people's names, dates, telephone numbers and the like recur in one or more applications makes this feature extremely useful.

• Word 2002 Let's say that you were writing a memo in Word about a forthcoming meeting, so you type in the names of attendees and the date of the meeting.



↑ You can customise Word 2002's Smart Tags – or turn them off completely, if you so choose – from the AutoCorrect dialog box

If these details are listed in your Outlook 2002 contacts and calendar databases, Word will underline the keywords in purple to alert you. Click on this underlined name, date or phone number and a small icon will appear above it with the Smart Tag drop-down menu.

From here, you can synchronise related tasks such as sending an email invitation to the meeting in Outlook or finding free time for it to take place. You can also import contact details for someone whose name appears in a Word document by simply hitting the Add to Contacts option from the pop-up menu hovering over the name in question. This saves lots of chopping and changing between applications.

An Options list is accessed by choosing Tools, AutoCorrect and clicking on the Smart Tags tab. Here, you can specify which sort of keywords to alert you to. If you find that recognising names, phone numbers, dates, times, recent email recipients and addresses isn't a sufficiently comprehensive list, you can click on the More Smart Tags tab and find further elements to add to the list from Microsoft's website. If you decide you no longer wish Office XP to apprise you of commonly used names or dates, go to Tools, AutoCorrect, Smart Tags and hit the Remove Smart Tags button.

• Excel 2002 Unlike Word, which highlights Smart Tags by underlining keywords, Excel 2002 displays a purple triangle in the lower righthand corner of a cell. This application only recognises two types of text: recent email recipients and financial symbols. However, the Smart Tags pop-up menu is identical to Word's, so use the directions explained earlier to alter your Excel Smart Tag preferences.

Excel's email-recipient Smart Tag lets you initiate various Outlook actions, as it did in Word. From the Smart Tag drop-down menu, you can send an email, schedule a meeting, open an Outlook contact, add to contacts or insert an address into your worksheet.

If you enter a stock, or financial, symbol in your worksheet, Smart Tags will recognise it and offer a menu of options. You can choose to insert a refreshable stock table into your Excel worksheet, or link to the latest price for that stock, news about that company, or get a report on that company from the web (at MSN MoneyCentral, naturally). ■