

Microsoft®
Office:mac
2004

Discovering
Microsoft Office

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This book, *Discovering Microsoft Office*, describes the programs included in Microsoft® Office 2004 for Mac® and how to use them individually and as a suite. Use this book together with online Help and other sources of information described in “Getting Help,” later in this chapter, to learn how to make the best use of Office 2004. For a description of new features, see **What’s New** on the **Learn** tab of the Project Gallery.

For setup information, see the *Getting Started* guide that came in your Office 2004 media case.

The Office programs

From a simple greeting card to a sophisticated business plan or multimedia presentation, Office 2004 helps you get the job done. New Office tools help you manage your projects and share or protect information.

The following programs are included in Office 2004:



Microsoft® Word 2004 for Mac®

Use this powerful word processing program to create your publications. The new WordNotes feature helps you take meeting notes on your laptop. New template designs, clip art, and drawing tools help you create professional-looking brochures and greeting cards.



Microsoft® Excel 2004 for Mac®

Use this analysis and spreadsheet program to evaluate, calculate, and analyze data. Make use of the improved charting and page layout capabilities to illustrate your data and make it look good in print.



Microsoft® PowerPoint® 2004 for Mac®

Use this presentation graphics program to create everything from slide shows to multimedia presentations to PowerPoint movies. The new presenter tools help you to present your slide show more efficiently.



Microsoft® Entourage® 2004 for Mac®

Use this e-mail program and personal information manager (PIM) to send and receive e-mail messages, and to maintain your address book, to-do list, and schedule. Use the new Project Center to view all Office documents and PIM items relating to specific projects.



MSN® Messenger for Mac 4.0

Use this instant messaging program to communicate in real time with friends and colleagues.

About this book

By default, this book is located in the Microsoft Office 2004/Office/Help/Learn/Discovering Office folder on your hard disk. You can also find it on the **Learn** tab of the Project Gallery. The book is in .pdf format. You can open it either in Adobe Acrobat Reader or in the Apple Preview program. You can print the entire book or specify the pages you want to print.

To keep procedures simple, only one method is given. Typically, the **Formatting Palette** is the quickest way to accomplish a task, so that method is often used. When menus and commands are specified, an angle bracket (>) is used to indicate the path. For example, **File > Print** means that you click the **Print** command on the **File** menu. Elements in the user interface appear in boldface. One-step procedures are preceded by a chevron (▶) to distinguish them from bulleted lists.

Basic tasks

The basic tasks of opening, saving, and printing a document are common to Word, Excel, and PowerPoint, and are explained in the following sections.

Note If more than one person will be using the Office programs on your computer, you can set up separate Office identities in Entourage so that each person can access his or her own mail in Entourage and other user information. For more information see [“Set up identities”](#) on page 82.

Start a program

When you install Office 2004, an icon for each installed program is placed in the Dock on your desktop. By default, an Office 2004 folder is created in the Applications folder on your hard disk.

- ▶ To start a program, do any of the following:
 - Click an icon in the Dock.
 - Double-click the program name in the Microsoft Office 2004 folder.
 - In the **Finder** window, double-click the file name for a document created with an Office 2004 program.

Tip To start a program automatically when you log in, click **Apple > System Preferences**. Under **System**, click **Accounts**. Select the account, and then click the **Startup Items** tab. Click the plus button, click the program name, and then click **Add**.

Begin with the Project Gallery

When you start Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, you'll first see the Project Gallery, which provides you with options for beginning your work.



The **New**, **Recent**, and **Projects** tabs provide you with options for opening a new or an existing document.

Open a new document

- ▶ To open a new document, do any of the following:
 - **Open a blank document** When the Project Gallery opens, **Blank Documents** is selected under **Groups**. Click the type of document you want, and then click **Open**.
 - **Use a template** A template determines the basic structure of a document and contains document settings, such as fonts, page layout, special formatting, and styles. Office 2004 provides you with a wide variety of templates, including many designs new in this release. They are listed under the various headings on the **New** tab of the Project Gallery. You can also create your own templates.
 - **Use a wizard** A wizard helps you create a specific type of document. You can select a wizard from **Blank Documents** on the **New** tab of the Project Gallery.

Open an existing document

- ▶ To open an existing document, do any of the following:
 - On the **Recent** tab of the Project Gallery, select the desired date range under **Date**, and then click the name of the document.
 - On the **Projects** tab of the Project Gallery, select a project, and then click the name of the document.
 - To open a document by making a copy of an existing one, select it in the Project Gallery, and then click **Open as copy**.

If you don't want the Project Gallery to open each time you start a program, on the **Customize** tab, clear the **Show Project Gallery at startup** check box.

Tips If you're not using the Project Gallery, you can open documents by doing the following:

- On the **File** menu of an Office program, click **Open**, and then navigate to the document you want. Or select from the documents you've worked on most recently, which are listed at the bottom of the **File** menu.
- Double-click the document icon in a folder on your hard disk. By default, the documents you create in Word, Excel, and PowerPoint are stored in the Documents folder, which is in your Home folder.

Save a document

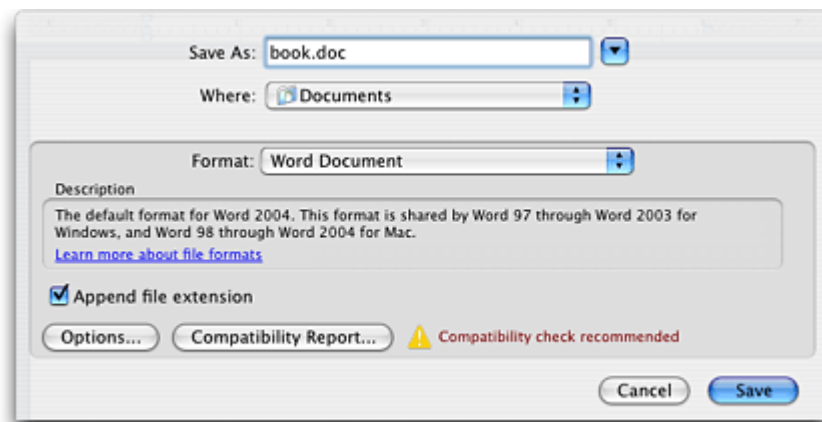
As you're working in a document, it's a good idea to save regularly so that you won't lose the work you've done in the event of a problem, such as a power outage.

- ▶ Click **File > Save**.

In addition, Word and Excel have an AutoRecover feature, which saves backups of your documents at the time interval specified. On the program menu, click **Preferences**, and then click **Save**.

new

The first time you save a document, you see the **Save As** dialog box, where you name the document. Office 2004 supports file names of up to 255 characters.



You'll see this same dialog box whenever you click **File > Save As**. In this dialog box, you can:

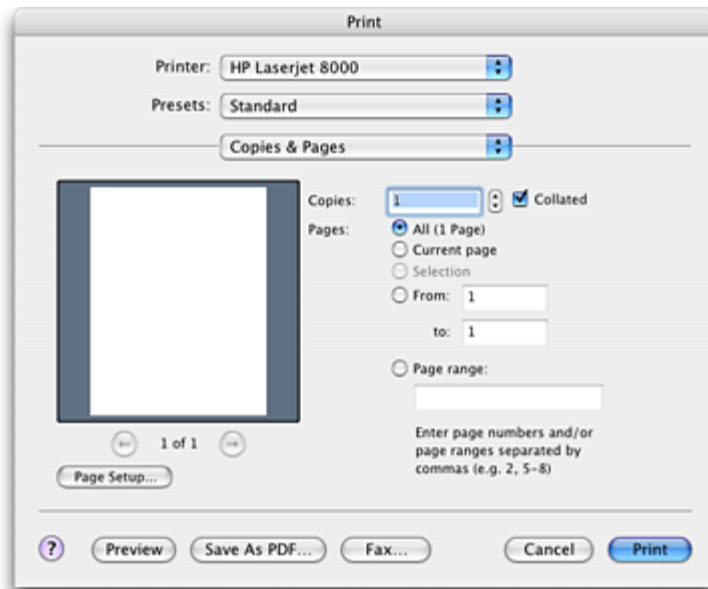
- **Create a copy of the document** Save the document with a different name.
- **Prepare the document to be used by a non-Office program** Save the document in another format. Select a format and read the description in the dialog box to determine if the format is appropriate. It's not necessary to save the document in another format if you'll be opening it in Office for Windows®.
- **Save the document in another location** By default, Office documents are saved in the Documents folder, which is in the Home folder on your hard disk.
- **Save the document to be used in Office for Windows.** Click **Append file extension** to add the three-letter file extension that Windows uses to identify the program needed to open the document. For more information about sharing documents with others, see "[Sharing Information](#)" on page 117.

new

A compatibility report, new to Office 2004, alerts you to specific compatibility issues if you're sharing your documents with other users. For more information, see "[Check compatibility](#)" on page 123.

Print a document

- Click **File > Print**. If necessary, change the printer name and select other printing options, and then click **Print**.



The **Print** dialog box options differ depending on the program and operating system you are using. Program-specific options are described in the chapter for that program. In all print dialog boxes, you can do the following:

- Save your print options as a named preset so that you won't have to select them individually again. To create a preset, first select the printing options you want to include. Then on the **Presets** pop-up menu, click **Save As**.
- Click the **Copies & Pages** pop-up menu to choose from a variety of printing options.
- Click **Page Setup** to change the setup options, such as paper size and orientation.
- Click **Preview** to see how your document will look when printed.

Basic features

An increase in consistency and integration among Office 2004 programs means that you can work with greater efficiency and ease in all of the programs.


Menus and toolbars

Office programs display a menu bar and one or more toolbars at the top of the program window.

- ▶ To perform an action, click a command on a menu or a button on a toolbar.

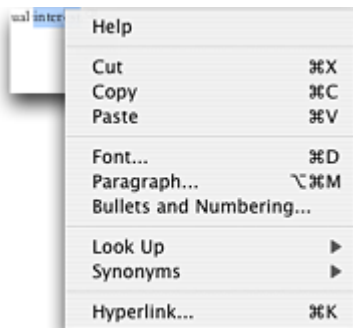


While the menus provide paths to all available commands, the toolbars provide a handy way to access the most common ones. In this document, menu and command paths are represented by an angle bracket (>) — for example, click **File > Save**. Toolbar buttons are

represented by a picture of the button . When working with menus and toolbars, you can do the following:

- To customize your menus or toolbars to display the commands or buttons you want, click **Tools > Customize > Customize Toolbars/Menus**.
- To display or hide toolbars, click **View > Toolbars**, and then select from the list.
- To display the name of a toolbar button, rest your pointer on the button, but don't click it.

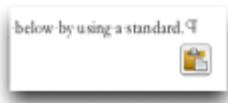
In addition to menus displayed in the menu bar, contextual menus are available when you hold down CONTROL and click text, objects, or other items, or when you right-click using a 2-button mouse.



Smart Buttons

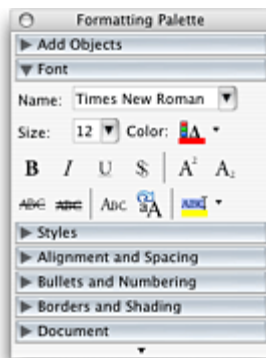
When you make changes in Word or Excel documents, buttons that appear, called smart buttons, give you control over automatic corrections and provide formatting options for text you paste into your document. For example, when you paste a selection of text, a smart button appears at the end of the pasted text. You can indicate whether you want the text to retain its original formatting or match the destination formatting.

- ▶ To select an option from a smart button, click the button, and then select from the list.




Formatting Palette

The **Formatting Palette** gives you quick access to the most commonly used tools for adding objects and formatting text in your documents. The options on the palette change depending on what program you're using and what you're doing. For example, when you select text, the **Formatting Palette** displays text-formatting commands. If you select a picture, it dynamically changes to display picture-editing commands. Note that the **Formatting Palette** does not include all formatting commands. If you don't find what you want, try the toolbars and menu commands.



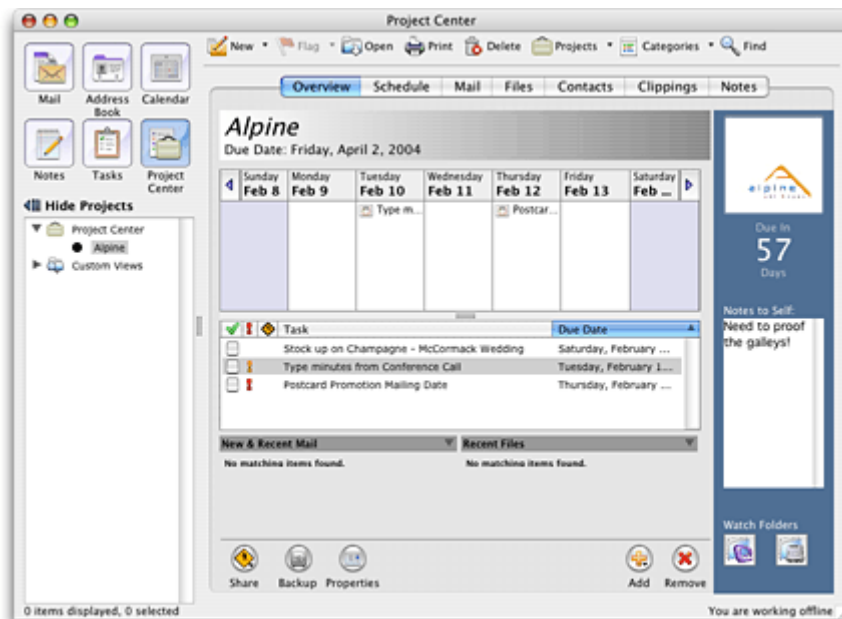
When working with the **Formatting Palette**, you can do any of the following:

- To display or hide the **Formatting Palette**, click . The palette becomes transparent when you're not using it so that its presence is unobtrusive.
- To expand and collapse the options available in a particular section of the palette, click the triangle next to the section heading.
- To see the options relevant to what you're doing, be sure that the appropriate item is selected. For example, to see table options, first click in the table.
- To insert shapes, tables, pictures, text shapes, and other objects from the new **Add Objects** section, drag the object into your document.

new

Project Center


With the new Project Center in Entourage, you can now manage an entire collection of information and communications by project.



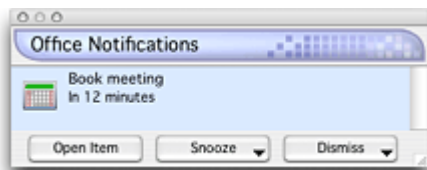
At a glance, you can see all the e-mail messages, contacts, meetings, documents, and clips associated with a project. The **Project Palette** in Word, Excel, and PowerPoint gives you access to this same information. For more information, see [“Managing Project Information”](#) on page 131.

Notifications

You can use Microsoft® Office Notifications to remind you of a task by displaying a reminder on your computer screen. Notifications can be associated with tasks and Calendar events that you created in Entourage or with Office documents that you flagged for follow-up.

- To create a reminder in a task or Calendar event, open the task or the event, and then click the **Reminder** check box. Indicate the time you want the reminder to appear.
- To flag an Office document for follow-up, open the document. Click **Flag for Follow Up** , and then enter the date and time. The flag is saved when you save the document.

The Notifications program runs in the background, and the window is displayed on your screen at the designated time whenever your computer is turned on.



- ▶ In the notification window, do one of the following:
 - For more information, click **Open Item**. For Office document reminders, click the name of the file to open the document.
 - To close the window, click **Dismiss**.
 - To be reminded again at a later time, click **Snooze**.

Getting Help

If you don't find the information you need in this book, see these other sources of information.

- **Online Help** Help provides conceptual and procedural information for all Office 2004 features. To access Help, click the **Help** menu in any program. You can search for the information you want using full-text search, the table of contents, the index, or the glossary.
- **Sample documents** Office 2004 provides several finished documents that showcase many features in Office 2004 programs. If you want to view these documents and learn how they were constructed, open the sample documents located on the **Learn** tab of the Project Gallery.
- **What's New** This document, located on the **Learn** tab of the Project Gallery, describes many of the new features provided in Office 2004 and tells where to find them in the programs. Help provides more details about using new features.
- **On the Web** Microsoft.com contains the latest information about Microsoft products, including Office 2004. Find product updates, downloads, news, and other resources to help you get the most from your software. Visit <http://www.microsoft.com/mac/>.



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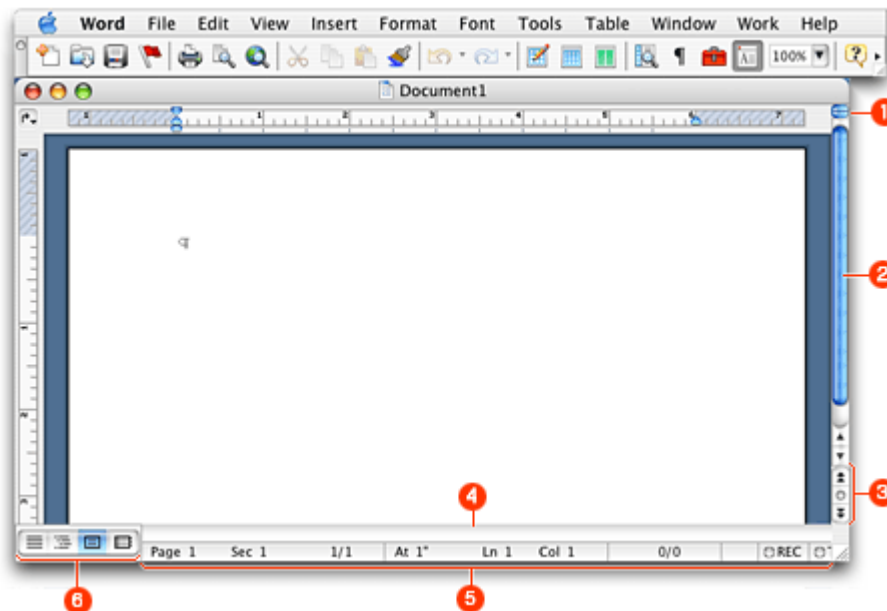
Microsoft® Word 2004 for Mac® is a word processing and publishing program for creating home, business, and school documents. Using Word 2004, you can create letters, reports, flyers, stationery, and other documents — even Web pages.

This chapter describes the primary features of Word and explains how to use them. For more information and for detailed procedures, look in Help. To find out what's new in Word 2004, see **What's New** on the **Learn** tab of the Project Gallery.

If you're creating a specific type of document, such as a flyer or brochure, check the **New** tab of the Project Gallery to see if a template exists that suits your needs; it will save you time and look professional. In addition, sample documents, located on the **Learn** tab of the Project Gallery, illustrate finished documents and explain how to create them.

The Word window

When you create or open a document, you work in the Word window. Some of the standard Office features you'll use in this window are described in [“Office Basics”](#) on page 7. This chapter covers features unique to Word.



- | | |
|-----------------------|-------------------------|
| 1 Split box | 4 Horizontal scroll bar |
| 2 Vertical scroll bar | 5 Status bar |
| 3 Browse buttons | 6 View buttons |

Viewing your document

You work in your document in one of the following views. Experiment by switching from one view to another. Select them from the **View** menu or click a view in the bottom-left corner of the window. Don't worry — none of your content is lost, even if it's not displayed in a particular view.


- **Normal** Use this view to enter text quickly. It doesn't display anchored graphics or page layout features.
- **Online layout** Use this view to see how a page will appear in a Web browser.
- **Page layout** This is the default view. Use it to see how your document will look in print.
- **Outline** Use this view when creating and structuring your document. The outline structure corresponds to the heading levels in your document.
- **Notebook layout** Use this new view when taking notes on your Macintosh. You can even add live recordings by embedding audio notes. For more information, see "[Taking notes with notebook layout view](#)" on page 36.

new

In addition to these views, Word gives you these options when you are looking at your document:

- **Drag the split box** located above the vertical scroll bar to divide the window into separate panes so that you can look at different sections of your document at the same time. Use the scroll bars to find the information you want. Drag the split box back to its original position to revert to one window pane.
- **Zoom in** for a closer look at your document, or zoom out to see more on the screen by changing the zoom percentages in the **Zoom** box . The zoom percentage affects the view on your screen only, not the size of elements on the printed page.
- **Maximize** the window viewing area on your screen. Click **View > Full Screen** to display the window without rulers, toolbars, scroll bars, or the status bar.
- **Navigate** to a specific section of your document using the Navigation Pane, which is new to

new

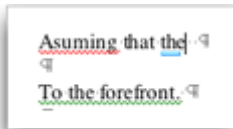
Word 2004. Click **Navigation Pane**  and, in the Navigation Pane that is displayed along the left side of your document, click the section you want. Select **Thumbnail** from the pop-up menu to display the pages of the document as small pictures.

Entering text

As you type in Word, the text flows from one line to the next, in the format and style you choose, within the margins specified on the **Margins** tab of the **Document** dialog box (click **Format** > **Document**). Each time you press RETURN, you start a new paragraph.

As you type, you may see the following:


- A red wavy underline, indicating that the word you typed is not in the spelling dictionary provided in Word.
- A green wavy underline, indicating that your sentence structure may be grammatically incorrect.



To turn off the wavy underline feature, click **Word** > **Preferences**. Click **Spelling and Grammar**, and then clear the **Check spelling as you type** and **Check grammar as you type** check boxes.

- ▶ To turn off the AutoCorrect spelling feature, click **Tools** > **AutoCorrect**, and then clear the **Automatically use suggestions from the spelling checker** check box.





Note that if you make common spelling mistakes, such as typing “teh” instead of “the,” the AutoCorrect feature of Word automatically corrects the mistake for you. If you place the insertion point in the word that has been corrected or if you rest the pointer over it, you’ll see the blue underline and

a smart button showing you that it has been corrected. Click **Undo**  to revert to the original spelling, or click an option from the smart button list. The AutoCorrect feature corrects only simple spelling mistakes. Sometimes you’ll need to do it yourself!

- ▶ To correct a misspelling, retype the word, or click **Tools** > **Spelling and Grammar**, and then use the Word spelling dictionary to correct the misspelling.

Copy or move text

If you want to repeat text or move it to another location in your current document or in another document, Word provides several alternatives to retyping the text.

- ▶ First select the text. Then do any of the following:
 - **Drag and drop** To move the selected text a short distance within a document, drag it to the desired location. To copy text, hold down **OPTION** while you drag.
 - **Cut/Copy/Paste** To move the selected text, click **Cut** . Click where you want the text to appear, and then click **Paste** . To copy selected text, use **Copy**  and **Paste** . Copied or pasted items are placed on the Office Clipboard and can be pasted multiple times and in other documents. For more information, see [“Copy and paste information”](#) on page 118.
 - **Use the Office Scrapbook** If you anticipate needing a block of text at some later time, you can copy it to the Scrapbook, new to Office 2004, and leave it there indefinitely. Click **Tools > Scrapbook**. Select the text, and then click **Add**.

new

Tips

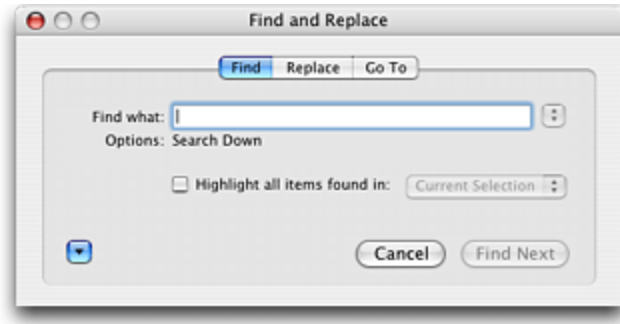
- Choose a formatting option for the pasted text by clicking the smart button that appears next to the pasted text.



- Use the same methods to move or copy an object, such as a photo or drawing.

Find and replace text

- ▶ Click **Edit > Find** or **Edit > Replace**, and then enter what you want to find.




Your find options include the following:

- **Find Next** Word highlights the first occurrence it finds. Click **Find Next** to find each occurrence in the document.
- **Replace** You can replace text, either for a single occurrence or for all occurrences. You can also find and replace punctuation or formatting.

Click the arrow button for more search options.

Undo an action

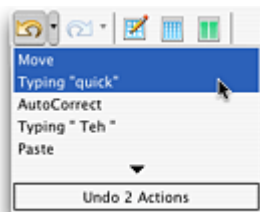
If you make a mistake or change your mind, there's a quick way to back out of your actions.

- ▶ Click **Undo** . Each click reverses one more action.

or

Click the **Undo** arrow, and then click the action you want to undo. Note that when you undo an action by selecting it from the list, you also undo all actions above it in the list. Remember

that you can always click **Redo**  to undo the undo!



new Look up information

Word puts the additional information you need to create an informed document at your fingertips through the **Reference Tools** tab of the Toolbox, which is new to Office 2004. For example, look up the definition of a word using the Encarta® World English Dictionary, which is built into Office.

- ▶ On the **Tools** menu, click **Dictionary**. In the **Word or Phrase** box, either type or paste the word you want defined, and then click **Go**.




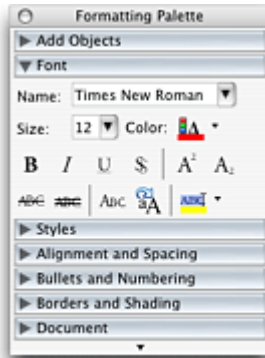
Alternatively, hold down CONTROL and click the word in your text. On the pop-up menu, point to **Look Up**, and then click **Definition**.

In addition to getting definitions, you can find synonyms, look up articles from the Encarta Encyclopedia, or search the Web.

Formatting text

Change the look of text by applying formatting. To get an idea of the possibilities, click **Formatting**

Palette . Formatting options are also available on the **Formatting** toolbar and the **Format** menu.



You can apply formatting to characters, paragraphs, lists, and tables.

Apply character formatting

- ▶ Select the formatting options you want, such as font, text size, or bold, and then type your text.

or

Select the text you want to apply the formatting to, and then select the formatting options.

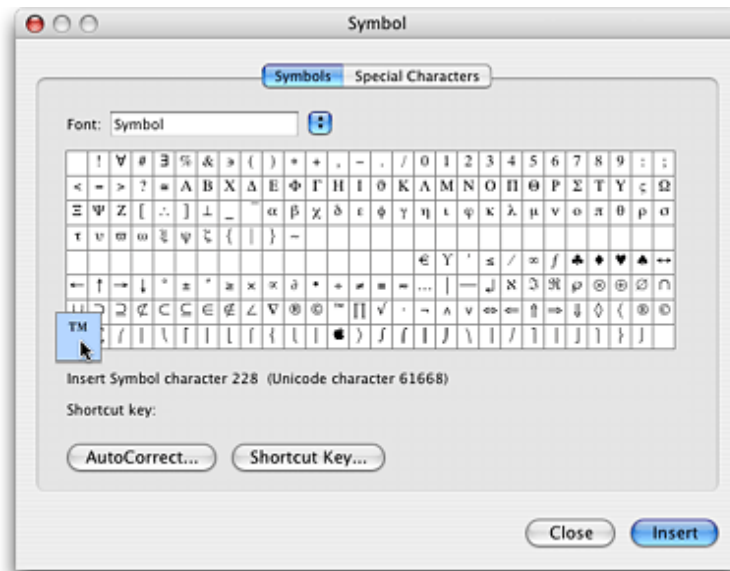
The following line of text illustrates different fonts and sizes, italics, and bold face.



Insert symbols

Not all fonts consist of letters. For example, use the Symbol font to insert symbols, such as scientific symbols and international monetary symbols, into your documents. The Wingdings® and Zapf Dingbats fonts provide additional symbols.

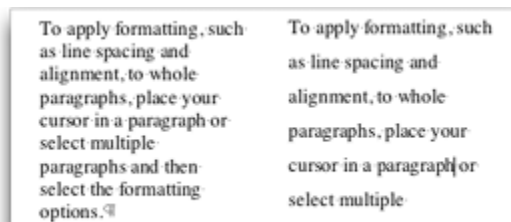
- ▶ To insert a symbol, click where you want to insert it, and then click **Insert > Symbol**. On the **Symbols** tab, click the symbol you want to insert. If the symbol you want is not displayed in the chart, try selecting another font.





Tip Some of the most common symbols are available on the **Formatting Palette** under **Add Objects**.

Apply paragraph formatting

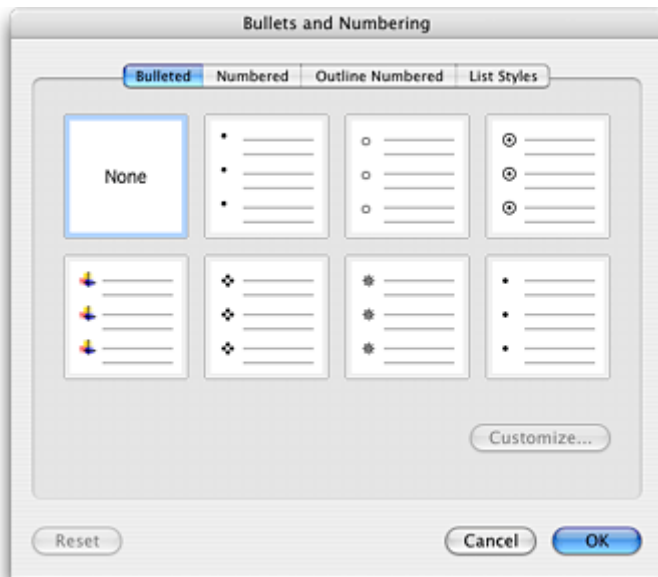
- ▶ Place your insertion point in a paragraph or select multiple paragraphs, and then select formatting options, such as line spacing and alignment, on the **Formatting Palette** or from **Format > Paragraph**. In the following example, the paragraph on the left is single spaced and the one on the right is 1 ½ spaced. Both are left aligned.



Create a bulleted or numbered list

- ▶ Click **Bullets**  or **Numbering**  and type the text. To end the list, click the button again or press RETURN twice.
 - **Auto bullets.** If you begin a paragraph by typing a hyphen (-), a chevron (>), or an asterisk (*) and then press the SPACEBAR or a TAB and type some text, Word automatically converts the paragraph to a bulleted list when you press RETURN. You can turn this AutoFormat feature off by clicking **Format > AutoFormat** and then clicking **Options**. On the **AutoFormat** tab, clear the **Automatic bulleted lists** check box.
 - **Auto numbering.** If you begin a paragraph by typing **1.**, pressing SPACEBAR or TAB, and then typing some text, Word automatically converts the paragraph to a numbered list when you press RETURN. Press RETURN again if you don't want to continue paragraph numbering.

You can change the look of the bullets and the numbers under **Bullets and Numbering** on the **Formatting Palette** or by clicking **Format > Bullets and Numbering**.



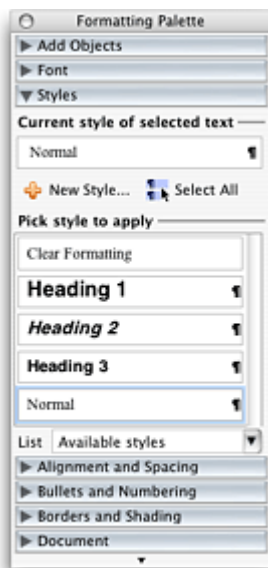
Tips

- To insert paragraphs that you don't want numbered within a numbered list, press SHIFT+RETURN.
- If you change a bullet style, it becomes the default style for all subsequent bullets.
- In Word 2004, you can create a style for your lists so that they are always formatted the way you want them, as described in the following sections.

Apply styles

The Styles feature provides a shortcut for applying multiple formatting characteristics all at once. For example, a paragraph style named Title might format text in the Arial font, in 24-point bold type, centered on the page. A paragraph style controls all aspects of a paragraph's appearance, while a character style affects only the selected text.

Word templates include predefined styles, which are listed under **Styles** on the **Formatting Palette** or on the **Formatting** toolbar. The default template is named Normal, and the default paragraph style is also named Normal. Other templates are based on the Normal style.



Apply an existing style

- ▶ To apply a style, click in the paragraph or select the text, and then select the style under **Styles** on the **Formatting Palette** or on the **Formatting** toolbar.

The list consists of styles created for the template, together with any styles you have created for the document. You can choose to display available styles, which includes commonly used styles and styles you have created, or all styles, which includes all styles in the template.

Create a style

You can create a new style in either of the following ways:

- ▶ Click **New Style** under **Styles** on the **Formatting Palette**. Name and define the style you want to create.
- ▶ Use individual formatting options to create the style you want, and then select the text. You'll see the attributes of the text under **Styles** in the **Formatting Palette**. Click **New Style**, and then name the style.

Tip You can copy styles from one document or template to another. Click **Format > Style**, and then click **Organizer**.

Modify a style

- ▶ Select the text, place your pointer in the style box, and then click **Modify Style**.

All paragraphs or text in your document that are formatted in that style will automatically reflect your changes.

Tip You can also modify the default styles in Word to look the way you want. If you modify heading styles, it's a good idea to keep the same names if you're planning to create an outline and table of contents. Word uses these names to automatically generate certain parts of a document.



Changing a page layout

Any document you work on has a default page size and margins defining the area in which text and other objects are displayed and printed. The page layout depends on which template you are using.

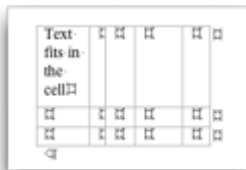
- ▶ You can change page layout in the following ways:
 - To change margins, select the text for which you want to change the margins, and then drag the margin markers on the horizontal ruler at the top of your document window. Or, click **Format > Document**. On the **Margins** tab, enter the margins you want.
 - To change the page layout of a portion of a document, first insert a section break by clicking **Insert > Break**, and then clicking the appropriate section break command.
 - To format content in columns, click **Format > Columns**, and then select your column options.
 - To include specific text at the top and/or bottom of every page, place the text in a header or footer. Click **View > Header and Footer**. Type the text you want to appear in the box. Use the toolbar that appears to enter AutoText or information that is updated automatically, such as page numbers or the date or time.

Creating tables

If you need to arrange text, numbers, or any other objects into columns and rows, consider using a table instead of tabs or spaces to align your information. Tables consist of rows, columns, and cells. First, look at your data and decide how you want to lay it out, making a rough guess at the number of rows and columns you'll need (you can adjust the numbers later). Word provides two starting points for creating the table:

- If you want a table with uniformly spaced rows and columns, click **Insert Table** , and then indicate the number of rows and columns you want.
- If you are creating a more complex or irregular table, click **Tables and Borders** , and then use the drawing tools to draw the outline and the cells of the table. For more information, search for “draw a table” in Help.

The default table format includes borders separating each cell. Note that the gray gridlines outlining each cell in the following table will not be printed.



Text fits in the cell				

Word provides many powerful table features. One way to learn about them is to explore the items listed on the **Table** menu. Here are some useful table features:

- **Navigation** You can quickly move from one cell to the next by using the TAB key. Use SHIFT+TAB to move backwards, and use the arrow keys to move horizontally or vertically.
- **Sizing** You can change the width of a column by selecting it and dragging the boundary. Change the width of the entire table by pointing to the bottom-right corner of the table and dragging in or out. Or, click **Table > Table Properties** and make the adjustments there. Make the size of the cells fit the content by clicking **AutoFit** on the **Table** menu, and then selecting a sizing option.
- **Format** You can control the look of the table by clicking **Format > Borders and Shading** or by using the drawing tools if you have drawn your table. Or you can modify your table by using one of the many table formats that Word provides. Click **Table > Table AutoFormat**, and then select a format from the list.
- **Spreadsheet features** In tables, you can perform some spreadsheet-like actions, such as sorting a column or inserting a formula in a cell. See the relevant items on the **Table** menu.

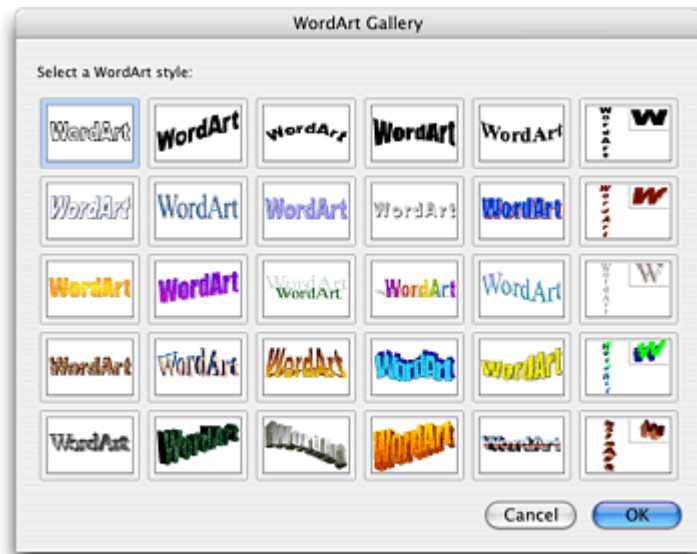
new

Tip In Word 2004, you can create your own table styles so that all your tables will look the same. After you create them, you can select them from the Style list.

Adding graphics

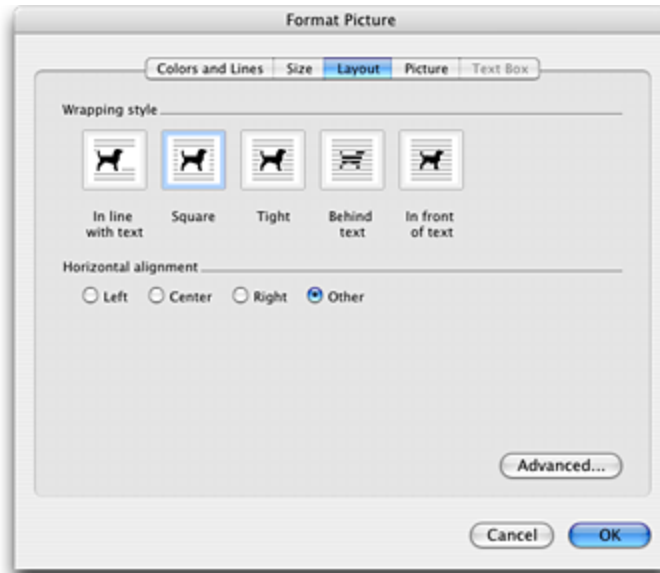
You can add graphics, or pictures, to your documents in two basic ways:

- **Insert existing art** These can be pictures (graphics files) stored on your computer or clip art installed with Office. Click **Insert > Picture > From File or Clip Art**. If you are looking for graphics to use in your documents, there are many sources, such as Microsoft Office Clip Art and Media at <http://office.microsoft.com/clipart/>.
- **Create art in Word** Use the drawing tools on the **Formatting Palette** to create many different graphics, including AutoShapes, which are a variety of basic shapes. You can also create decorative text by using WordArt on the **Insert** menu under **Picture**.



When you place a graphic in a document by clicking **Insert > Picture**, it is placed in line with the text and is attached to the character next to which it is placed. If you want to display a graphic in another manner — for example, to have it remain in the same location on the page or to have text wrap around it or in front of it (called a floating graphic) — you'll need to anchor the graphic.

- ▶ To create a floating graphic, select the graphic, and then click **Format Picture** on the **Picture** toolbar. On the **Layout** tab, click any wrapping style except **In Line with Text**. To choose from additional wrapping styles, click **Advanced**.



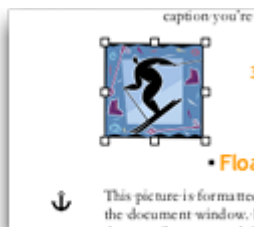
Tips

- To see floating graphics, you need to be in page layout view.
- When you insert a graphic into your document, you can link it rather than save it with the document. This helps keep the file size small. When changes are made to the graphic, they are automatically reflected in your document.
- For information about graphic file formats, see [“Save pictures as files”](#) on page 125.

Manipulate floating graphics

Once a floating graphic is in your document, it can be moved, resized, or reformatted.


- ▶ Click the graphic to select it. (The square selection handles indicate that it’s selected.)



With the graphic selected, you can do the following:

- To move the graphic, place the cursor on the boundary of the graphic. When you see an icon in the shape of a hand, drag the graphic to the desired location.
- To resize the graphic, place the cursor over a selection handle. Drag the double-angled cursor in the desired direction.
- To reformat a graphic, look on the **Formatting Palette**. The formatting options available to you depend on the type of graphic.

The upper-left corner of a floating graphic is attached to the nearest paragraph marker by an anchor. You can see the anchor, shown in the picture above, if you select the graphic and show paragraph

markers (click **Show/Hide** ). If you move the graphic on the page, you may see the anchor jump to attach itself to a new paragraph marker. If you edit previous sections of the document, this may cause the graphic to reposition itself in unexpected ways. To minimize this, it's a good idea to lock the anchor to the first paragraph marker on a page.

- To lock the anchor of a graphic, in the **Format Picture** dialog box, click **Advanced**. On the **Picture Position** tab, under **Options**, click **Lock anchor**.

Tip To add a graphical element to your document that is displayed faintly in the background, click **Insert > Watermark**, and then specify the content. You can use text (such as "Draft") instead of a picture.


Insert a text box

If you want text to appear within a contained area in your document, distinct from the margins on the page, you can use a text box.

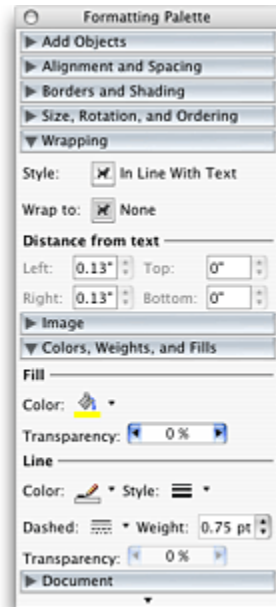
1. Click **Insert > Text Box**.
2. In the document, click where you want to place the box, and then drag your cursor to create the box.
3. Click inside the box, and then type your text.

With text boxes, you can do the following:

- Format the text in a text box just as you format any text in your document.
- Reposition and resize the text box just as you do with a picture or object.
- Link text boxes so that text flows from one box to the next. This is helpful, for example, in a newsletter where you want to continue a headline story on page 3. To link two text boxes, first create the two boxes. Click the first box to select it. On the **Text Box** toolbar, click **Create Text**

Box Link . You'll see an upright pitcher, which turns into a pouring pitcher as you move the insertion point to the second text box. Click the second box. Note that the second text box must be empty when you create the link.

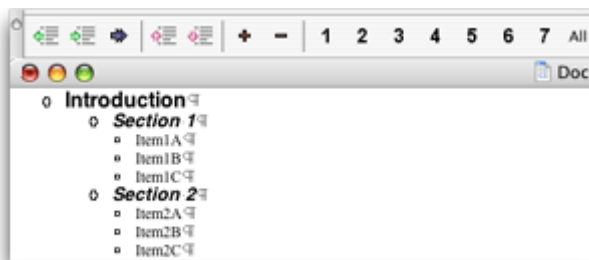
- Wrap text around a text box. Click a text box border, and then on the **Formatting Palette**, under **Wrapping**, select the options you want.








Creating an outline

Use the outline view to create an outline or as a starting point for structuring a long document. It also gives you a quick way to restructure documents once they're written.

An outline consists of heading levels and body text.



In outline view, you can do the following:

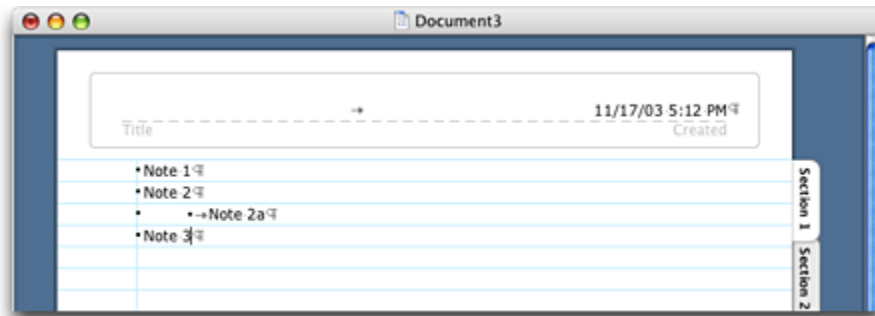
- Display only the heading levels you want to see. Click a heading level number, or click **All**.
- Restructure your document. Select one or more headings and click **Move Up**  or **Move Down** . All subheadings and body text move with the heading.
- Change heading levels. Select a heading and click **Promote**  or **Demote** . Click **Demote to Body Text**  to change a heading to body text.

new

Taking notes with notebook layout view

Notebook layout view is a new Word 2004 feature that you can use whenever you want a quick and easy way to take notes and organize them into sections on tabs. You can also incorporate AudioNotes to track all the information you need. Notebook layout view comes with its own toolbar to apply basic formatting.




- ▶ To display notebook layout view, click **View > Notebook Layout**, or click **Notebook Layout View** at the bottom of the window.



- ▶ To create a note entry, type your text, and then press RETURN. Each time you press RETURN you create a new entry.

In notebook layout view, you can do the following:

- To rearrange your notes, drag a note handle to the desired position.
- To create an outline structure for your notes, press TAB to demote an entry or SHIFT+TAB to promote an entry. When you demote an entry, the entry preceding it becomes a heading with a triangle that you can click to expand or collapse the display of subheadings.
- To create a new section, click the + tab under the section tabs that appear along the right side of the document.

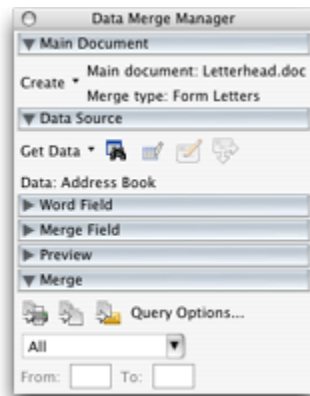
- To create an audio note, click **Audio Notes Toolbar** . On the toolbar, click **Start Recording** . An audio icon appears in the left margin, at the place in the notes where the recording was made.
- To flag a note entry, under **Note Flags** on the **Formatting Palette**, click the arrow, and then click the symbol you want to insert into the left margin of the note.
- To create an Entourage task from a note entry, in the **Formatting Palette** under **Note Flags**, click **Create Entourage Task**. The task is linked to this entry. You can also click **Flag for Follow Up**  on the toolbar to create an Entourage task when you save the file.

Note Notebook layout view documents can be opened in Word for Windows; however, it is not compatible with OneNote™.

Working with mass mailings

Word includes a data merge feature that you can use to combine any type of boilerplate text with unique information that is stored in a separate file. For example, you can create form letters and envelopes, each with a different name and address, or personalized legal documents or contracts. You can print sheets of labels with unique information, such as a series or a tracking number, on each label.

- To create a document that uses the data merge feature, click **Tools > Data Merge Manager**. Beginning with the **Main Document** section in the Data Merge Manager, complete the sections in order.

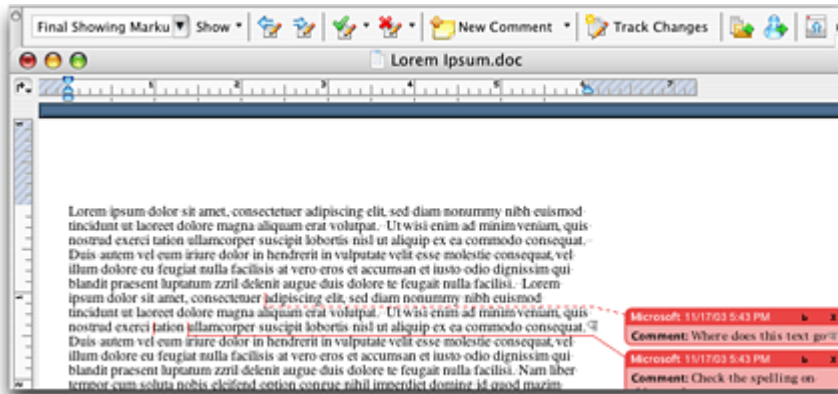




For more details, search for “data merge” in Help.

new

Reviewing documents

Use the reviewing feature, a color-coded change-tracking system, to collaborate with others on a document. The reviewing feature allows the author to see suggestions or changes made by other contributors and provides options to accept or reject the changes. Also, look for the comment bubbles, new to Word 2004. The bubbles are color-coded by reviewer, and include the name, date, and time when the change or comment was made.



- ▶ To prepare a document for reviewing, click **View > Toolbars > Reviewing**. On the **Reviewing** toolbar, click **Track Changes** .
- ▶ To make editing changes, insert and delete text as usual. The changes appear in a balloon to the right of the document. To add a comment, click near the related text. On the **Reviewing** toolbar, click **New Comment** .

To incorporate tracked changes, first indicate what you want to view in the first two boxes on the toolbar, and then click a button to accept or reject changes.



Creating a Spreadsheet by Using Excel

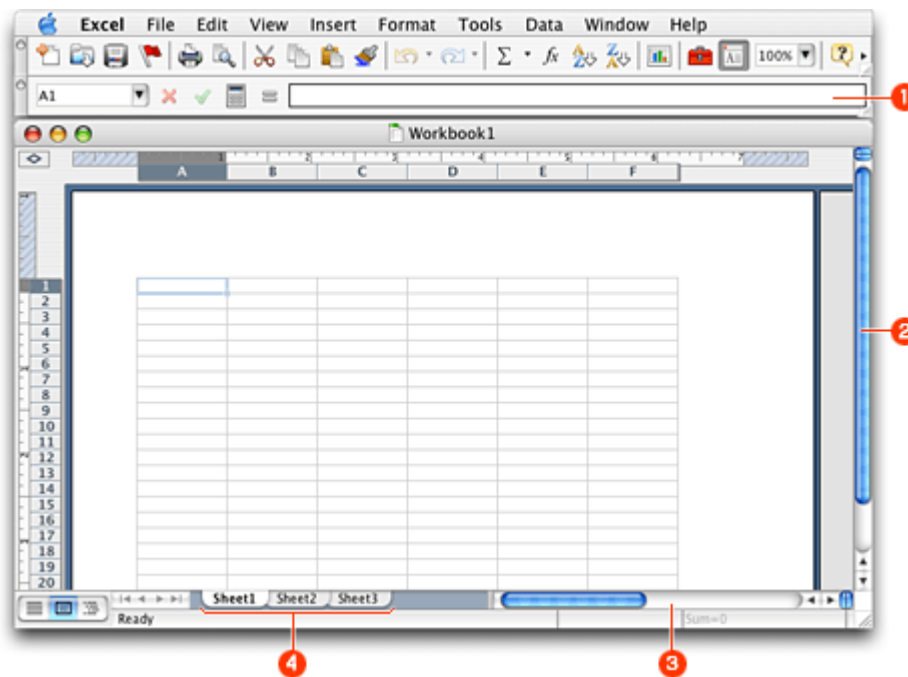
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Microsoft® Excel 2004 for Mac® is a feature-rich spreadsheet program that helps you evaluate, calculate, and analyze data. At home, you can use Excel to create monthly budgets, evaluate a car loan, or catalog a home inventory. At the office, you can use advanced features to manage, track, and chart critical business data.

This chapter describes the primary features of Excel and explains how to use them. For more information and for detailed procedures, look in Help. To find out what's new in Excel 2004, see **What's New** on the **Learn** tab of the Project Gallery. In addition, sample documents, also located on the **Learn** tab, illustrate finished workbooks and explain how to create them.

The Excel window

When you create a workbook, you work in the Excel window. Some of the standard Office features you'll use in this window are described in [“Office Basics”](#) on page 7. This chapter describes features unique to Excel.



- 1 Formula bar
- 2 Vertical scroll bar
- 3 Horizontal scroll bar
- 4 Sheet tabs

A workbook is made up of worksheets, which are identified by the tabs at the bottom of the window.

new

Viewing worksheets

Excel opens in page layout view, which is new in Excel 2004. The various Excel views are useful for different phases of creating your worksheet.


- ▶ To switch from one view to another, click a view button in the bottom left corner of the Excel window, or click a view on the **View** menu.

The following views are available:

Page layout This view makes it easy to see how your data will look on the printed page, without using **Print Preview**. You can see and edit headers and footers, view print titles, adjust margins, and view multiple pages of a worksheet at once. You can more easily work with columns, rows, and drawing objects.

Normal In this view, you can focus on the data across a worksheet rather than on the page.

Page break preview In this view, you can easily adjust page breaks before printing.

Before printing, click **Print Preview**  to see how your worksheets will look when printed.

Tips

- You can specify a view for opening all new workbooks. Click **Excel > Preferences**. Click **View**, and then under **Show**, select the view you want to use.
- To see multiple pages in page layout view, on the **View** menu, click **Zoom**, and then select a percentage, for example, 25%.

Entering data

Worksheets are grids made up of cells arranged in vertical columns and horizontal rows. Each cell can contain a value (numbers or text) or a formula.

- ▶ To enter data in a cell, click the cell and type the value. You can move one cell at a time in any direction by using the arrow keys.

You can also enter data in an active cell by typing in the formula bar.

The active cell has a border, and the cell reference appears in the **Name** box. A cell reference is the set of coordinates that a cell occupies on a worksheet. For example, the reference of the cell that appears at the intersection of column B and row 3 is B3.



You can name a cell or a range of cells so that you don't have to use the cell references to refer to them.

- ▶ To name a cell or range of cells, select the cells, type the name in the **Name** box, and then press RETURN.

If you have added labels to the cells, you can also refer to the cells by their labels, which are displayed at the top of the columns and the left of the rows to describe the data within the worksheet.

Tip You can change the color your computer uses to indicate selections. Click **Apple > System Preferences**. Under **Personal**, click **Appearance**. Select the highlight color you want from the list.


Change the cell data format

The cell data format indicates the kind of information the cell contains. Excel includes several built-in number formats so that you can display data as currency, percentages, decimals, dates, and times.





- ▶ To change a cell format, select the cell, and then click **Format > Cells**. (The default cell format for a number is General.)

The cell format is important for calculations and display purposes. It also affects the way cells are sorted. For example, because Excel sorts text values separately from numbers, the sort order is affected if some cells in a column are stored as numbers and others as text.

Select cells

- ▶ To act on a cell or a group of cells, first select them in one of the following ways:
 - To select a single cell, click it.
 - To select a range of cells, drag across the range.
 - To select nonadjacent cells or cell ranges, select the first cell or range of cells, and then hold down **⌘** and select the other cells or ranges.
 - To select a large range of cells, click the first cell in the range, hold down **SHIFT**, and then click the last cell in the range. You can scroll to make the last cell visible.
 - To select an entire row or column, click the row or column heading.
 - To select all of the cells on a worksheet, press **⌘ + A** or click **Select All**  in the top left corner of the worksheet.

Move or copy cells

1. Select the cells.
2. Click **Cut**  or **Copy** . A moving border appears around the cells.
3. Select the top left cell where you want to start pasting, and then click **Paste** . You can click **Paste Options** , which appears beside the pasted text, to select a formatting option.

You can also move cells by dragging them:

1. Select the cells to be moved, and then place the pointer on a border of the selection.
2. When the pointer changes to a hand, click and drag to the desired position. To copy instead of move cells, hold down CTRL and then drag. Click an option from the list that appears.

Note that when you move or copy cells, Excel also copies the formulas and their resulting values, comments, and cell formats. Click **Edit > Paste Special** to paste specific elements of the cell.


Delete or clear cells

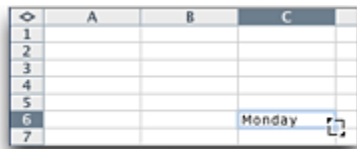
You can delete a cell, which removes the cell itself from the spreadsheet, or you can clear a cell, which removes the data but leaves the cell.

- ▶ To delete a selected cell, click **Edit > Delete**, and then indicate how you want to shift the adjacent cells.
- ▶ To clear a selected cell, press the DELETE key or click **Edit > Clear**, and then indicate what you want to clear.

Enter a series

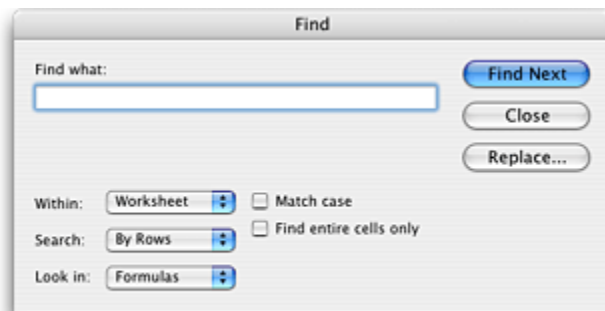
Excel automatically fills in data that belongs in a series, such as the days of the week, months and years, or a series of numbers, so that you don't have to enter all the information manually. Type one or two entries, as needed, to identify the series. For example, enter January and February, and Excel will fill the selected cells with the months of the year.

- ▶ To enter days of the week automatically, select a cell, and then type a day of the week. Rest the pointer on the lower-right corner of the cell until it becomes a fill handle, and then drag the fill handle over the cells you want to fill. If the sequence inserted is not the one you want, click **AutoFill Options** , and select another.



Find or replace data

- ▶ To find or replace data or formulas in one or more spreadsheets, click **Edit > Find** or **Edit > Replace**, and then enter data in the boxes.



new **Tip** In Excel 2004, you can search and replace across multiple worksheets.

Creating lists and charts

Excel wizards help you create professional-looking lists and charts. The wizards provide a variety of formatting options.

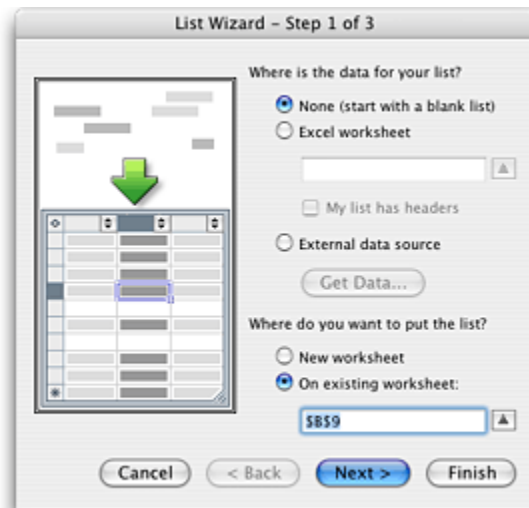
Create a list

A list is a set of rows and columns. By defining your data as a list, you'll be able to search, analyze, and sort the data faster and more effectively.

In Excel 2004, lists are contained within list frames so that you can easily distinguish them from the rest of the worksheet. When you specify a range of cells as a list, you automatically get AutoFilter drop-down arrows on your headings that allow you to view data based on specific values from the list. You can insert or delete rows of data in your list without affecting adjacent data on the worksheet.

1. Select the data you want included in the list.
2. Click **Insert > List**.

Excel displays the List Wizard, which asks you to define the list.



3. Verify that the correct data has been specified, and then select a location for the list.
4. Click **Next** to define columns and name the list, or click **Finish**.

You can modify the data and the look of the list by using options on the **List** toolbar.

-  To sort the cells in a selected column, click **Data > Sort**, and then select your sorting options.

Note Excel sorts cells formatted as text separately from cells formatted as numbers. For more information, search for “sort” in Help.

You can display only the rows in a list that meet your specified criteria. Filtering doesn’t rearrange a list; it simply hides rows temporarily.

1. To display only the rows that contain a specific value, click the arrow in the column heading that contains the data you want to display.
2. Click the value.

The arrow in the column heading changes color to indicate that the list is filtered.

For more information, search for “AutoFilter” in Help, or see the **Lists** sample document on the **Learn** tab of the Project Gallery.

Tip You can apply conditional formatting. For example, values greater than 100 can be formatted as bold. Double-click the column heading. In the **Column Settings** dialog box, click **Conditional Formatting**.

Create a chart

Use Excel charts as a quick way to view your data graphically. Make use of the new default colors, color schemes, and other formatting features to make your charts look appealing.

1. Select the data. Include header rows and columns, which will become labels. You'll get better results if you don't select totals.


2. Click **Chart Wizard** .



Tip At this point, you can click **Finish**. A column chart appears with default formatting. To define the look of the chart before creating it, continue with the rest of the procedure.

3. In step 1 of the Chart Wizard, select a chart type. Different chart types lend themselves to different types of data. For example, pie charts are good for showing percentages.
4. In step 2, indicate whether the series for your chart is in the rows or columns you selected. Click the **Series** tab to label your chart.
5. In step 3, click the different tabs to define additional elements of your chart.
6. In the final step, indicate whether you want the chart to appear on its own sheet or as an object on another sheet (typically the same sheet as the data).

After you complete your chart, be sure to experiment with the chart options available on the **Formatting Palette** so that your chart looks exactly the way you want it. ScreenTips identify the elements of the chart so that you know what you'll be changing.

- ▶ To modify your chart, first select the chart, and then make changes using options provided on the **Formatting Palette** .

For an example of a chart, see the **Chart** sample document on the **Learn** tab of the Project Gallery.

Using formulas and functions

Formulas are equations that perform calculations on values in your worksheet. Formulas can perform mathematical operations, such as addition and multiplication, or they can compare worksheet values or join text.

Functions are predefined formulas that perform calculations by using specific values, called arguments, in a particular order or structure. Functions can be used to perform simple or complex calculations. For example, the SUM function totals values or ranges of cells, and the PMT function calculates the loan payments based on an interest rate, the length of the loan, and the principal amount of the loan.

Create a formula

All formulas in Excel begin with an equal sign (=) followed by a sequence of values, cell references, names, functions, or operators.

Here's an example of a formula displayed in the formula bar:



In this example, the sum of the values of B1, B2, and B3 is subtracted from the sum of the values of A1 and A3. This value is then divided by 12.


The formula consists of the following elements:

- =** Indicates a formula.
- A1 + A3** Adds the values in cells A1 and A3.
- Subtract (operator).
- SUM** Function.
- ()** Indicates that this calculation should be done first.
- B1:B3** Add the values in the cell range (B1, B2, and B3).
- /12** Divide the total from the preceding by 12.

To create this formula:

1. Enter numbers in cells A1, A3, B1, B2, and B3.
2. Click cell A4 to enter the formula.
3. In the formula bar, enter an equal sign (=).
4. Type (.
5. Click cell A1, and then click cell A3.
6. Type). The + (plus) add operator is entered automatically.
7. Type -SUM(.
8. Select cells B1 through B3.
9. Type)/12.
10. Press RETURN. The result of the formula is displayed in the cell.

Tips

- Click **Calculator**  on the formula bar to work in a calculator-style interface rather than in the formula bar.
- To edit the formula, click the cell, and then press CONTROL+U. The new Range Finder automatically shows the cells referred to by the formula. Each reference to a range is color-coded. To change the cells included in the reference, drag the handle in the lower-right corner of the range.

For more information, search for “common error messages” and “mathematical operators” in Help.

Copy and paste a formula

Do any of the following:

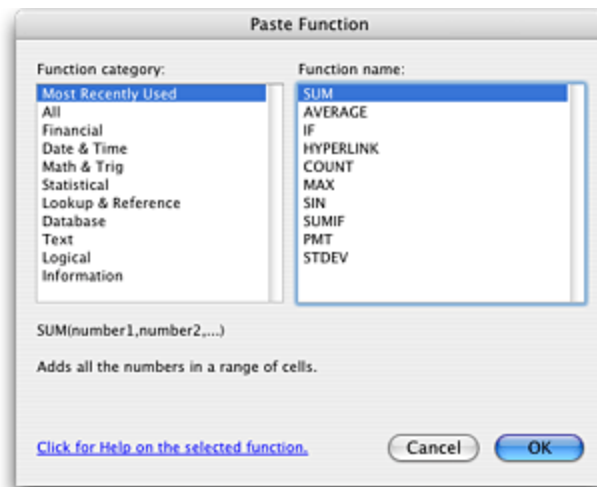
- To enter a formula into a range of cells, select the range first, type the formula, and then press CONTROL+RETURN.
- You can also enter a formula into a range of cells by copying a formula from another cell. If you’re using absolute cell references, they won’t change. An absolute cell reference retains the exact address of a cell, regardless of the position of the cell that contains the formula. If you’re using relative cell references, Excel automatically adjusts the references in the pasted formula to refer to different cells relative to the position of the formula. Search for “relative cell reference” in Help for more information.
- To copy a formula into adjacent cells, select the cell that contains the formula, and then drag the fill handle over the range you want to fill.



Insert a function

Excel includes a library of over 140 functions, such as SUM, AVERAGE, and PMT, to meet most of your computing needs.

To use a function, select the function name and enter the arguments (the values the function uses to perform the operations or calculations).

1. Select a cell, and then click **Insert > Function**.



2. Click a function category and a function name. Excel displays the syntax and a definition. Click **OK**.
3. In the formula palette that appears, enter the arguments, using either of these methods:
 - Type the data or the cell references in the argument boxes.
 - Click **Collapse Dialog**  to select a cell or cell range in the worksheet. Press RETURN or click **Expand Dialog**  to return to the formula palette.

The results appear in the cell. The formula is displayed in the formula bar.

new

Tip When you begin entering a function in the formula bar, a ScreenTip, new in Excel 2004, displays the syntax for the function. Click the function name to display the Help topic for that function.

AutoSum

Summing is the most common function in Excel. Use the AutoSum feature to find a quick total.

1. Click the cell where you want to place the sum.

2. Click **AutoSum** .

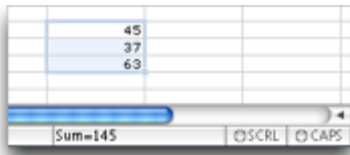
If you want an average, a count, or the maximum or minimum value, click the **AutoSum** arrow, and then select the function.

Excel places the total in the selected cell and displays the formula in the formula bar.

Excel makes a best guess at the cells that should be summed. For example, if you've selected a cell at the bottom or to the right of a range of numbers, it will total these numbers. To change the range, drag your pointer across the desired range.

3. Press RETURN to see the results in the cell.

Note Whenever you select two or more cells with numeric values, Excel displays the sum in the status bar. Click the **Sum** box for other options.



Analyzing your data

In addition to displaying and performing calculations on your data, Excel provides features that you can use to analyze the data in sophisticated ways. The following sections include examples of these features. Search for the feature names in Help for more information.

Change a variable to reach a goal

Goal Seek helps you to see how much you need to change a variable to reach a specific goal. When goal seeking, Excel varies the value in a cell you specify until a formula that's dependent on that cell returns the result you want. For example, use Goal Seek to change an interest rate incrementally until the payment value equals the value that you want (for example, \$900).

- ▶ To use Goal Seek, click **Tools > Goal Seek**, and then set a cell value.

Change a set of values to examine the outcome

The Scenarios feature helps you examine different variables to see how they affect the outcome. A scenario is a set of values that Excel saves and can substitute automatically in your worksheet. For example, if you want to create a budget but are uncertain of your revenue, you can define different values for the revenue and then switch between the scenarios to perform what-if analyses.

- ▶ To create a scenario, click **Tools > Scenarios**, and then click **Add**.

Analyze your data from different angles

PivotTable reports are interactive tables that rotate rows and columns of data so that you can see your data in different ways. Use PivotTable reports to make comparisons, reveal patterns and relationships, and analyze trends. For example, if you are a buyer for a store that sells three different models of a product for two different branches of the store, you can use a PivotTable report to review the sales data for last year and decide which models to buy for next year.

- ▶ To create a PivotTable report, click a cell in the data you're going to analyze, and then click **Data > PivotTable Report**.

For an example of a PivotTable report, see the **PivotTable Report** sample document on the **Learn** tab of the Project Gallery.

Modifying workbooks

The previous sections of this chapter discussed workbook content. Excel also provides you with many options for modifying the structure of the workbook.

Change rows and columns

- ▶ Do any of the following:
 - To insert a row or column, click in the row below or in the column to the right of where you want to insert it. Click **Insert > Rows** or **Insert > Columns**.
 - To adjust a column width, in a column heading, drag the boundary of the column until it's the width you want. To adjust the column width to fit the longest entry for a cell in that column, double-click the boundary to the right of a column heading.
 - To delete a row or column, select it, and then click **Edit > Delete**.
 - To cut or copy a row or column, click the row or column, and then click **Edit > Cut** or **Edit > Copy**. If you want to insert it between two columns or rows without overwriting existing data, click where you want to insert the row or column, and then select **Insert > Cut Cells**.

Change worksheets

▶ Do any of the following:

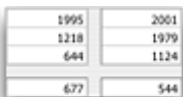
- In page layout view, a worksheet is displayed in pages, as they will be printed. To activate a page, click it. All inactive pages above and to the left will also become active and will be printed when you print the worksheet (you can specify the pages to print in the **Print** dialog box).
- To navigate between worksheets, click the worksheet tab at the bottom of the window.
- To add a worksheet, click **Insert > Worksheet**.
- To move a worksheet, click the worksheet tab at the bottom of the window and drag it to the desired position.
- To move a worksheet to another workbook, click **Edit > Move or Copy Sheet**, and then select a location. Select the **Create a Copy** check box if you want to copy the worksheet instead of moving it.
- To delete a worksheet, click **Edit > Delete Sheet**.
- To rename a worksheet, double-click the worksheet tab, and then type the new name.

Viewing your data

It can be difficult to track the contents of a large worksheet when viewing it on your computer. Excel provides features to make this task easier.

Split a window into multiple panes

You can view different areas of a worksheet at the same time by splitting the window into panes.



1995	2001
1218	1979
644	1124
677	544

▶ You have the following options:

- To split a window, drag one of the split bars to the desired location.
- To split a window into four panes, drag both split bars.
- To restore a split window to a single pane, double-click the split bar.

Freeze a pane

You can freeze panes so that they're always in view. For example, if your top row and leftmost column contain headers, you can freeze them so that you'll always be able to see the labels for your data no matter where you scroll.

- ▶ In normal view, you have the following options:
 - To freeze the top row of your worksheet, click in cell A2, and then click **Window > Freeze Panes**.
 - To freeze the first column of your worksheet, click in cell B1, and then click **Window > Freeze Panes**.
 - To unfreeze the panes, click **Window > Unfreeze Panes**.

Create a custom view

After you set up a workbook for viewing and printing a certain way, you can save those settings as a custom view so that you don't need to recreate it. Custom views are saved with the workbook.


- ▶ To save a group of display and printing settings, click **View > Custom Views**, and then click the **Add** tab. Name the view and indicate what you want to include.
- ▶ To display a custom view, click **View > Custom Views**, and then select the name from the list.

Formatting data

- ▶ To create spreadsheets that are easy to read and look good on the printed page, use formatting options on the **Formatting Palette**. For example, you might want to try the following:
 - To distinguish between different types of information, add colors under **Font** or borders under **Borders and Shading**.
 - To more easily read the contents of a narrow column, rotate the text and apply rotated borders under **Alignment and Spacing (Orientation)**.
 - To format certain cells in a list differently if they meet specific criteria, click **Format > Conditional Formatting**, and specify the criteria.

Format headings

The first row of a worksheet often contains headings, which can be formatted differently from the rest of the cells.



- ▶ To format a heading, select the cells in which you want the heading to appear, and type the text. Then, on the **Formatting Palette**, select font and alignment options:
 - To merge cells, under **Alignment and Spacing**, click **Merge cells**. Click the up arrow in the **Indent** box to specify the left indent.
 - To bold the text, under **Font**, click **Bold** .
 - To center the text, under **Alignment and Spacing**, click both a **Horizontal** and a **Vertical** centering option.
 - To increase the row height, in the row number column on the left, rest the pointer on the lower border of the cell containing the row number and drag the border down.

Printing and saving workbooks

Before you print, you'll want to give some thought to how your data looks on the page. Excel provides several ways to preview and adjust the data on the page.

Create headings

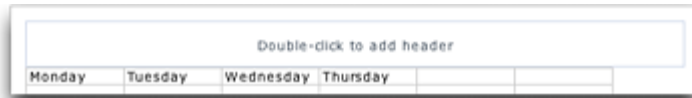
You can create print titles, which are rows and column labels that will be repeated as headings on every printed page when you print a worksheet.

1. Click **File > Page Setup**, and then click the **Sheet** tab.
2. To repeat either a row range or a column range, click the **Collapse Dialog** button  and, in the worksheet, select the cells containing the labels you want repeated. Click the expand button .

Create headers and footers

You can add headers and footers to your workbook so that page numbers or other text will appear above or below the worksheet area of every page.

- ▶ In page layout view, double-click the white space immediately above or immediately below the worksheet. Type your text in the box that appears. Or click buttons on the toolbar to indicate the type of information you want to include, and then click **Close** on the toolbar.



Fit data on the page

For information about how your data will look when printed, see [“Viewing worksheets”](#) on page 41.

- ▶ To fit data on a single printed page, you can do any of the following:
 - To change the page orientation to fit more columns on the page, on the **Formatting Palette** under **Page Setup**, click **Landscape**.
 - To scale the content to have data appear as you want it to, use one of the print scaling options under **Page Setup** on the **Formatting Palette** or in the **Print** dialog box.
 - To change the page margins quickly, drag the margins on the rulers in page layout view. Or you can specify the margins exactly on the **Formatting Palette**. Under **Page Setup**, in the **Sheet** section, click **Margins**.
 - To control the amount of data on a page, click **View > Page Break Preview**, and then click and drag the page breaks with your mouse.

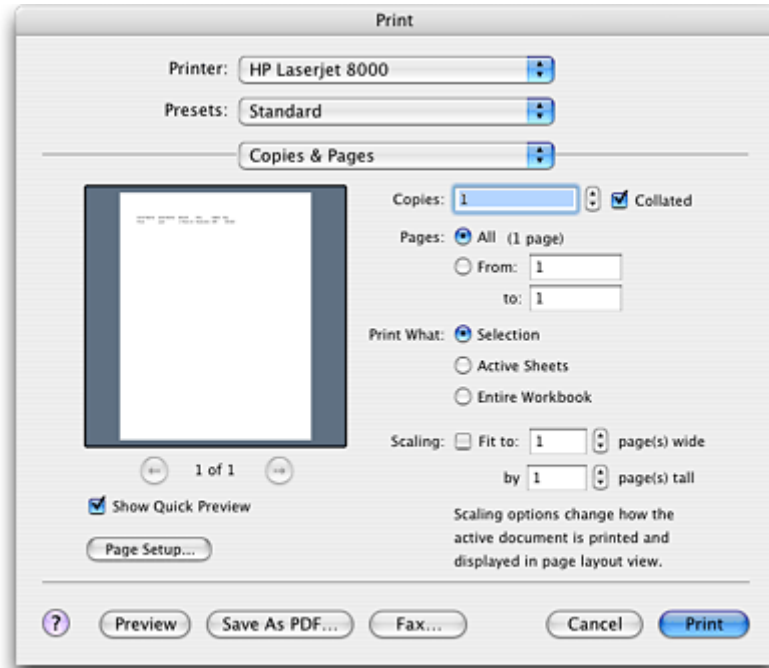
Print data

For basic printing information, see [“Print a document”](#) on page 13. If you have created your worksheet in page layout view, you can see how your data will look when printed.

You can define a specific set of cells as a print area in Excel. You can then print this area at any time.

1. In the worksheet, select the cells to be included in the print area.
2. Click **File > Print Area > Set Print Area**.

Whenever you print, with **Active Sheets** selected under **Print What** in the **Print** dialog box, only the print areas of the worksheets will be printed. You'll see the print areas in the preview area of the dialog box.



Save your workbook

Save your work in Excel just as you do in any Office program, as described in “[Save a document](#)” on page 12 in Office Basics.

- ▶ When saving a document in Excel, note the following:
 - To share your workbook with others who are using earlier versions of Excel, click **File > Save As**, and then select an appropriate format.
 - To share your workbook with others who are using non-Office programs, select a format such as SYLK in the **Save As** dialog box.

To save selected data, a worksheet, or a workbook as a Web page, click **File > Save as Web Page**. Note that charts become graphics in .gif format.



Creating a Presentation by Using PowerPoint

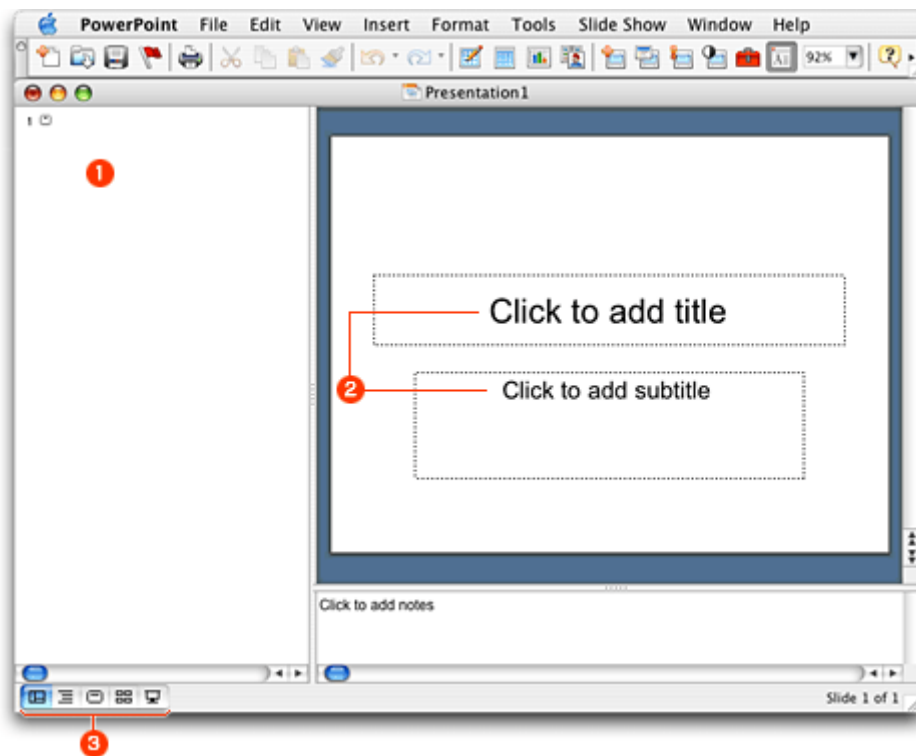
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Microsoft® PowerPoint® 2004 for Mac® is a graphical presentation program that helps you create professional, attention-getting presentations. Your presentations can include animations, transitions between slides, charts, and multimedia elements, including pictures, movies, and sounds. Be sure to see the new animation and transition effects! PowerPoint provides many ways for you to deliver a presentation — as a slide show on your Mac, on the Web, and as a QuickTime movie.

This chapter describes the primary features of PowerPoint and explains how to use them. For more information and for more detailed procedures, look in Help. To find out what's new in PowerPoint 2004, see **What's New** on the **Learn** tab of the Project Gallery. Sample documents, located on the **Learn** tab of the Project Gallery, illustrate finished presentations and explain how to create them.

The PowerPoint window

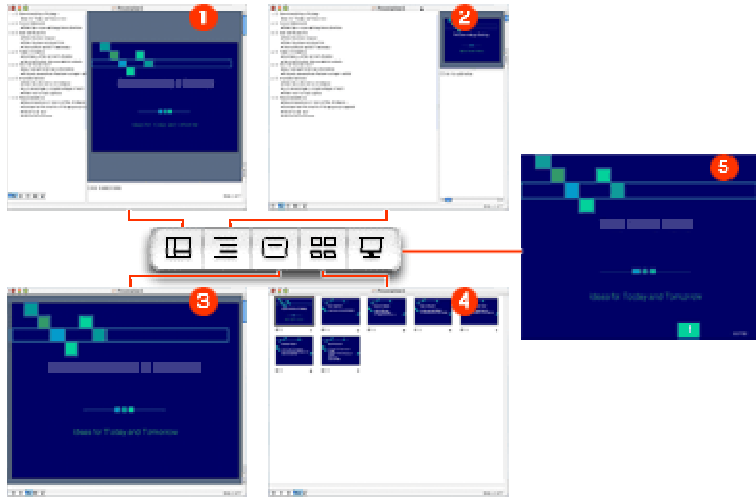
When you create a presentation, you work in the PowerPoint window. Some of the standard Office features you'll use in this window are described in [“Office Basics”](#) on page 7. This section covers features unique to PowerPoint.



- ❶ Outline pane
- ❷ Text placeholders
- ❸ Views

Viewing presentations

PowerPoint provides different views in which to create, review, and give your presentation. Switch among views by selecting commands on the **View** menu or by clicking a view button in the lower-left corner of the window.




- ❶ **Normal** Use this view to work directly on the slide, in the outline structure, and in the notes pane. (When you are focusing on notes for your presentation, click **View > Notes Page** to work in a large view of this area.)
- ❷ **Outline** Use this view when you're concentrating on the slide text and textual structure.
- ❸ **Slide** Use this view when you're working on the slide content and don't want to be distracted by the outline or notes.
- ❹ **Slide sorter** Use this view to quickly rearrange the order of the slides by dragging the thumbnails from one position to another. You can also preview transitions in this view.
- ❺ **Slide show** Use this view to preview and give the presentation. You'll see both animations and transitions. Move from one slide to the next by clicking the mouse. Press ESC to exit the slide show. Be sure to see the new "[Presenter tools](#)" on page 77, which you can use when giving your presentation from a second monitor.

Creating slides

A presentation consists of a series of slides. Each slide acts as a container for different types of information, including text, pictures, charts, tables, sounds, music, and animations. Each slide is based on a slide layout, which provides the structure for the slide.

Create a new presentation by choosing a design from the Project Gallery or by clicking **File > New Presentation**.

- ▶ To create a new slide, click **New Slide** .
- ▶ To select a slide layout that will best accommodate the type of information you want to include on the slide, on the **Formatting Palette**, under **Add Objects**, click **Slides**, and then click a slide layout.



Slide layouts include placeholders for different types of text or objects. By clicking a placeholder and entering your own content, you don't have to worry about sizing or positioning, although you can easily resize and move the elements after they're on the slide.

You can include information or an object, such as a logo, on all slides in your presentation by using the slide master layout. The slide master holds the formatted placeholders for the titles, main text, and any background items you want to appear on all slides based on that slide master.

- ▶ To make changes to the slide master, click **View > Master > Slide Master**.

Choosing a template

When you installed PowerPoint, a set of templates was installed on your computer. It's a good idea to create your presentation by using one of these templates, especially if you're new to PowerPoint. The overall look of the slides — including such elements as background design, text styles, and colors — is controlled by the template.

- ▶ To select a template before you begin to create your slides, on the **New** tab of the Project Gallery, under **Groups**, click the **Presentations** triangle, and then click **Designs**. Click the design you want, and then click **Open**.
- ▶ To select a template at any point after you've started to create the slides, click **Format > Slide Design**.

Tips

- In the Project Gallery, you can select a content template instead of a design template. Content templates provide you with both design and suggested content.
- You can find additional PowerPoint templates on the PowerPoint page of Microsoft.com. Visit <http://www.microsoft.com/mac/>.
- You can change the color scheme of the template you're using by selecting a color scheme on the **Formatting Palette** under **Presentation**. A color scheme gives colors to the text, background, and other elements on your slides.

Adding content to slides

At its simplest, a presentation consists of a title slide and a series of slides with bulleted text. PowerPoint provides you with many other options if you want to get creative.

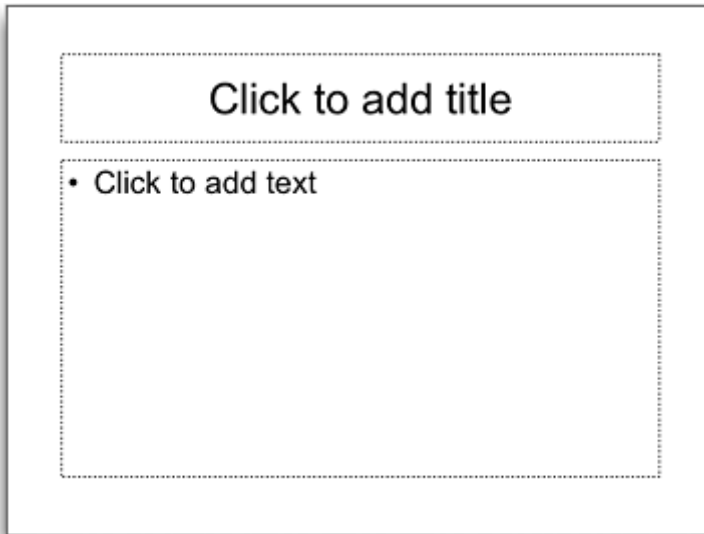
Insert text

Text placeholders in PowerPoint are structured either in a title style or as bulleted items.

- ▶ To enter text in a text placeholder, click the placeholder, and then type your text.

For bulleted lists, type the text for a bulleted item, and then press RETURN to create the next bullet. To indent a bulleted item, press TAB before typing the text.

The size of the text is automatically adjusted to accommodate the amount of text you enter.



Tips

- When you paste text from other sources, the text adopts the formatting of the current Slide Master.
- You can check spelling the same way you do in Word by clicking **Tools > Spelling**. PowerPoint also has an AutoCorrect feature similar to the one in Word. To turn off specific AutoCorrect features, click **Tools > AutoCorrect**.

Change text format and design

The initial look of the text is defined by the template you're using. Make text design changes for all slides in your presentation on the Slide Master. Make changes on specific slides by first selecting the text on the slide.

- ▶ You can make the following types of changes to the text:
- Change the font, size, color of text, or text style by selecting an option under **Font** on the **Formatting Palette**.
 - For bulleted text, change the color and style of the bullet by selecting an option under **Bullets and Numbering** on the **Formatting Palette**.
 - Change the alignment of the text and the spacing between lines of text or between paragraphs by selecting an option under **Alignment and Spacing** on the **Formatting Palette**.
 - Change the size or transparency of the text by clicking **Format > Font**. Transparent text is new in PowerPoint 2004 and allows you to create any effect where text appears to float over an image. Also see the new condensed and extended font effects.

new

Insert a text box

You can enter text in a text box instead of using a text placeholder. The text style matches that of the template you're using, but you'll need to size and position the text box on the slide yourself. Note that text entered in a text box does not appear in the outline.



1. Click **Insert > Text Box**.
2. Click in the slide, and then drag to create the box.
3. Type the text.

After you create a text box, you can select it by clicking its border, and then you can do any of the following:

- Change the text style just as you would for placeholder text.
- Resize and reposition the text box just as you would any object. For more information, see [“Manipulate floating graphics”](#) on page 33.
- Add a fill color, outlines, and transparency to the box by selecting options on the **Formatting Palette**.

Insert a table or chart

You can create tables and charts in PowerPoint or copy them into your presentation from another program, such as Word or Excel.

- ▶ To create a table or chart in PowerPoint, click **Insert > New Slide**, and then click a slide layout that includes a table or chart. On the slide, double-click the placeholder to create the table or chart.
- ▶ When you insert tables or charts created in Excel or Word, you have the following options:
 - To insert a table created in Word, first select the table in Word, and then copy it. In PowerPoint, click **Edit > Paste**. The chart becomes a picture that you can move and resize but not edit.
 - To insert a chart created in Excel, first select the chart in Excel, and then copy it. In PowerPoint, click **Edit > Paste**. The chart becomes a picture that you can move and resize but not edit.
 - To embed a chart from Excel, click **Edit > Paste Special > Microsoft Excel Chart Object**. When you embed a chart, you can edit the chart in Excel by double-clicking it on the slide.

Insert a picture or drawing

Pictures in PowerPoint presentations can originate from existing art that you copy to a slide, or they can be objects that you draw in PowerPoint directly on the slide.

Insert a picture

1. With the slide displayed in normal view, click **Insert > Picture > From File**, and then locate the picture you want to insert.
2. Do one of the following:
 - To embed the picture in your slide, click **Insert**.
 - To link the picture in your slide to the picture file on your hard drive, select the **Link to File** check box, and then click **Insert**.

Note If you link a picture to a presentation, the picture will reflect any changes made to the original file. A linked picture does not become part of the presentation, which is an effective way to keep the file size of the presentation small. If your presentation contains linked files, you might want to save it as a PowerPoint package so that all the files remain attached to the presentation. See [“Save a presentation as a PowerPoint Package”](#) on page 76.

If you used a picture placeholder, the sizing and positioning will be done for you. For information about graphic file formats and compatibility considerations, see [“Ensure document compatibility”](#) on page 125.

Insert photos from a scanner or digital camera

You can insert photos directly from a scanner or digital camera if your scanner or camera is either TWAIN-compatible or supports Adobe Photoshop plug-ins.


1. Place the picture in the scanner, or connect the digital camera that contains the picture to your computer.
2. With the appropriate slide displayed in normal view, click **Insert > Picture > From Scanner or Camera**.
3. Select your scanner or digital camera on the **Devices** menu, and then click **Acquire**.
4. Do one of the following:
 - If the selected device is a scanner and you want to use default settings for scanning the image, click **Web Quality**, and then click **Insert** to scan your picture.
 - If the selected device is not a scanner (for example, a digital camera) or you want to customize any settings before you scan the picture, click **Custom Insert**. PowerPoint will start the program that came with your device. Follow the instructions that came with the device.

Notes

- Some devices come with more than one software program. If you are not sure which software to use, check the device documentation or contact the manufacturer of the device.
- The **Insert** button might be unavailable with some scanners because the scanner software doesn't support an automatic scan. Use the **Custom Insert** button instead.

Insert clip art from the Clip Gallery

The Clip Gallery contains a wide variety of pictures, sounds, and motion clips (animated .gif pictures) that are ready for you to insert into your presentations.

1. Display the slide you want to add clip art to.
2. Click **Insert Clip Art** .
3. Click the category you want, and then click the image.
4. Click **Insert**.

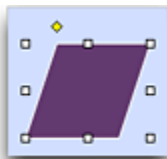
Tips

- To insert pictures of your own into the Clip Gallery, search for “Add a clip to the Clip Gallery” in Help.
- If you can’t find a picture, music, sound, video, or animation clip you want to use, connect to Design Gallery Live, a Microsoft Web site that contains additional clips available for download. Visit <http://office.microsoft.com/clipart/>.

Create your own art

You can create your own art by using the shapes, lines, and other drawing options available in PowerPoint.

- ▶ To draw a shape or other graphical element on a slide, do one of the following:
 - On the **Formatting Palette** under **Add Objects**, select the type of object you want, and then drag the object onto the page.
 - On the **Drawing** toolbar (click **View > Toolbars > Drawing**), click the type of object, such as **AutoShapes** or **Lines**. For AutoShapes, point to a type of AutoShape, and then click a shape. Then click in the slide to insert the shape.



▶ With a shape selected, you can do the following:

- Type text inside the shape.
- Use options on the **Formatting Palette** or the **Drawing** toolbar to change the line style, line color, and fill color. Be sure to see the soft shadows, new to PowerPoint 2004.

new

Tip To use guides to align the shapes, click **View > Guides**. Click the vertical or horizontal guide outside the slide margins and drag to where you want them. To add a new guide, hold down the **OPTION** key while you click the guide.

Insert a movie or sound

You can include movies or sounds in your slides. Because of their large size, movies and large sound files, which are created outside PowerPoint, are linked to the presentation rather than being placed in the presentation. If you're going to move a presentation to a different computer, be sure to save it as a package so that the movies and sound files are included.

A sound on a slide is represented by an icon. A movie on a slide is represented by the first frame of the movie. You can choose to have sounds and movies play as soon as the slide appears or when you click the movie or sound icon on the slide.

▶ Click **Insert > Movies and Sounds**, and then click a command. Insert the file you want.

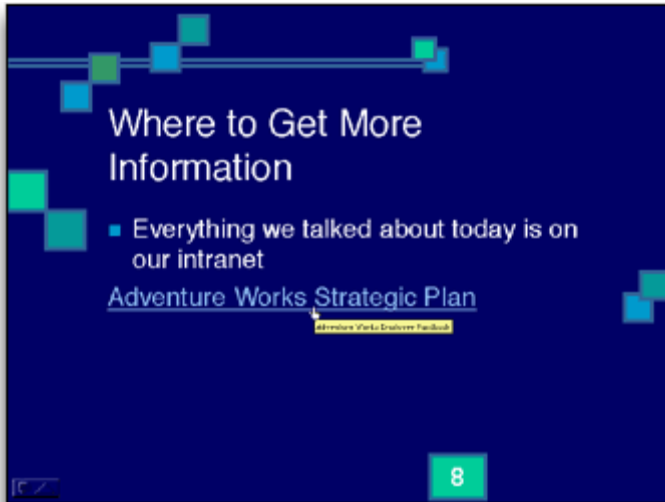
Tips on sounds

- When you installed PowerPoint, some sample sounds were installed. These are available to you through the Clip Gallery. If you insert your own sound, use a file format that is compatible with PowerPoint, such as Apple QuickTime Movie Sound (MOV) or Microsoft Windows Waveform (WAV). For the complete list of supported sound formats, see Help.
- In addition to associating a sound with a specific slide, you can create a soundtrack that plays during an entire PowerPoint movie. Click **File > Make Movie**, and then click **Movie Options**. On the **Background soundtrack** pop-up menu, click **Select soundtrack**.
- To change play settings — for example, to loop the sound — click **Slide Show > Custom Animation**.

Tip on movies Acceptable movie formats include QuickTime, MPEG, and AVI. For more information, see "[Ensure document compatibility](#)" on page 125.

Insert a hyperlink

Broaden the scope of your presentation by linking a slide to an appropriate site on the Web.



- ▶ Select the text or object you want to link, and then click **Insert > Hyperlink**. In the **Link to** box, type or paste the Web address you want to link to, and then click **OK**. The link appears on the slide.

Tips

- To display a cue when you rest the pointer on the hyperlink, click **Insert > Hyperlink**, and then click **ScreenTip**. Type the text you want, and then click **OK**.
- To preview how a hyperlink will appear in the slide show, click **View > Slide Show**, and then click the hyperlink.
- You can also add a hyperlink to text or to an object in a presentation that will open another presentation, another slide in the same presentation, or a file in another program. For an example of hyperlinked slides, see the **Kiosk** sample document on the **Learn** tab of the Project Gallery.

Preparing the presentation

After you create the slide content, you can think about the overall appearance of the presentation and any enhancements you want to make.

Rearrange slides

In slide sorter view, you can preview your entire presentation as miniature slides so that it's easy to change the slide order.



▶ To move a slide, click **View > Slide Sorter**. Drag your slides to the desired position.

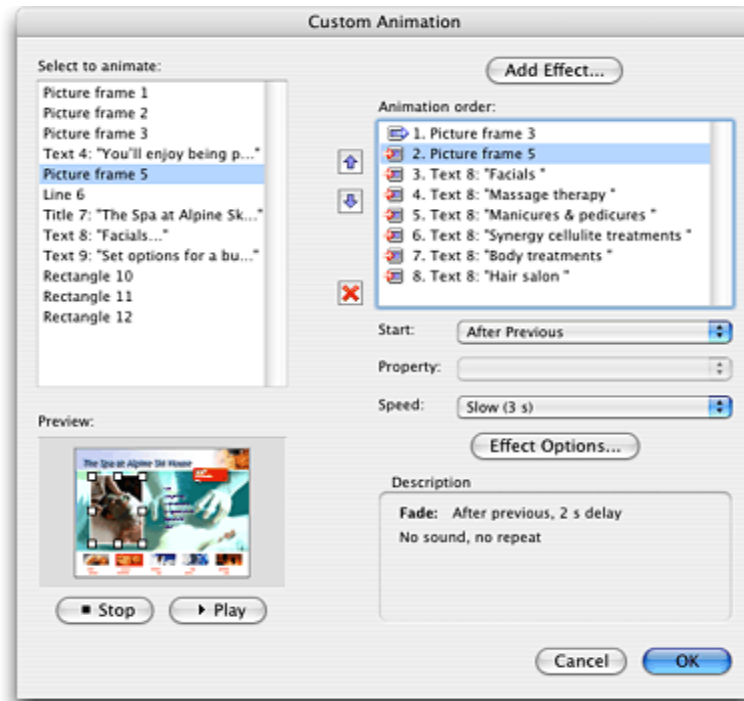
You can also drag slides from one position to another in the outline pane in normal view.

new Animate text or pictures

You can keep your presentation lively by using animations to enhance a line of text or an image. PowerPoint 2004 offers over 200 custom animations.

1. In normal view, select the slide that contains the text or object you want to animate.
2. Click **Slide Show > Custom Animation**.

3. Under **Select to animate**, select the text or object you want to animate.



4. To change the order of animation, select the animation, and then click one of the arrows to move it up or down in the list.
5. To set the timing, select the animation, and then select either of the following on the **Start** pop-up menu:
 - To start the animation manually by clicking the mouse button, click **On Click**.
 - To start the animation automatically, click **Automatically**, and then enter the number of seconds you want to elapse between animations.
6. Under **Preview**, click **Play** to see how your selection looks when animated.

Tip A quick way to apply animation effects is to select the object you want to animate (in normal view), click **Slide Show > Preset Animations**, and then click the option you want.

Set slide transitions

PowerPoint comes with a set of special effects that enhance transitions from one slide to the next. Be sure to see the new transitions available in PowerPoint 2004, including two new Mac-only transitions (3-D Cube and Flip). You can apply them to one or more slides, and you can choose whether to activate them automatically or with the click of a mouse.

1. In slide sorter view, select the slides you want to apply the transitions to.
2. Click **Slide Show > Slide Transition**.
3. Select the desired transition effect and other options. Note that you can select a sound to play during the transition.
4. To view the transition, click **Slide Show > Animation Preview**.

Note PowerPoint 2004 does not support QuickTime transitions.

Create speaker's notes


You can create notes for each slide to help you remember key points during a presentation.

1. Click **View > Notes Page**.
2. Click the notes box, and then type your notes for the current slide. You can change the font and font size if you want. Note that text you type in the notes box is not visible on the slide itself.



3. Use the scroll bar to move to other slides you want to add notes to.

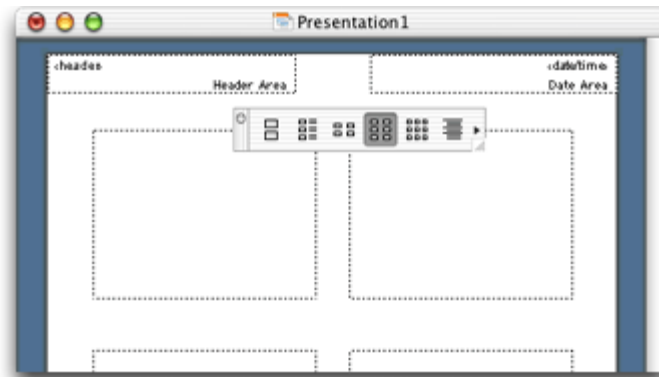
Tips

- To magnify your view, click **Zoom** , and then click a percentage.
- You can also type notes in normal view. Click in the area under the slide, and then type your notes.

Create audience handouts

Slide handouts help those attending the presentation take notes and retain key points for future reference. Handouts show only the slides; they don't include speaker notes.

1. Click **View > Master > Handout Master**.



2. Click **File > Print**.
3. On the **Print What** pop-up menu, click the number of slides you want on each handout, and then click **Print**.

Tip To add a date-and-time stamp to your handouts, select **<date/time>** in **Date Area**, and then click **Insert > Date and Time**. Select the format you want, and then click **OK**.

Showing the presentation

Use the slide show view to display your presentation. If you'll be using two monitors, use the presenter tools described later in this chapter.

1. Click **View > Slide Show**. Or click the **Slide Show** view button in the bottom-left corner of the window.
2. Click to advance through the presentation one slide at a time. (If you have specified animations to occur on mouse clicks, each click displays the next animation.)

If you want to end a presentation before you reach the last slide, press **ESC**.

Save a presentation to always open as a slide show

You can save a presentation so that it automatically starts the slide show when you open it from your desktop or the Finder. You might want to do this if you set up a computer to give a presentation at a meeting and you want to start the slide show from your desktop.

- ▶ Open the presentation you want to save as a slide show, and then click **File > Save As**. On the **Format** pop-up menu, click **PowerPoint Show**, and then click **Save**.

PowerPoint saves your presentation with a .pps file extension rather than the normal .ppt extension.

Note You might want to save the PowerPoint show with a different name so that you can continue to edit the original file.

Save a presentation as a PowerPoint Package

If you have linked other files to your presentation, save your presentation as a PowerPoint Package. When you save a Package, PowerPoint automatically gathers all of the linked files (images, sounds, and movies) that your presentation uses into one folder. This makes your presentation portable — easy to copy, store on compact disc, send, and share.

1. Open the presentation you want to save as a PowerPoint Package.
2. Click **File > Save As**.
3. On the **Format** pop-up menu, click **PowerPoint Package**.
4. In the **Save As** box, type a new name for the presentation.
5. Click **Save**.

new Presenter tools

If you're going to give your presentation on a second monitor, use presenter tools, a new feature in PowerPoint 2004. With Presenter tools, you can display the slide show on the public monitor as usual, while your monitor shows a new view that allows you to easily see the next slide, your speaker notes, and the elapsed time. Large navigation buttons allow you to easily navigate to any slide you want. A **Help** button displays a list of keyboard shortcuts.

- ▶ To prepare for giving your presentation by using presenter tools, click **Slide Show > View Presenter Tools**. With just one monitor attached to your computer, you'll see your presentation with the Presenter tools — a good way to practice for the real thing! To exit the presentation, press ESC.
- ▶ To give a presentation by using presenter tools, first attach a second monitor and turn video monitoring off. Then click **Slide Show > View Presenter Tools** to give the presentation.



Other presentation options

PowerPoint provides you with several alternatives for saving and giving your presentation. If you're planning to share your presentation with Windows users or with users who do not have PowerPoint installed, see "[Sharing Information](#)" on page 117 for more information.

Save a presentation as a PowerPoint Movie

After you create your presentation in PowerPoint, you can make it into a QuickTime movie. You can share your PowerPoint Movie by sending it through e-mail, posting it on the Web, or playing it on your computer.

1. Click **File > Make Movie**.
2. To specify PowerPoint Movie options, click **Movie Options**, and then click **Next**.
3. Select the options you want, and then click **OK**.
4. In the **Save As** box, type a name for your PowerPoint Movie.

If your PowerPoint Movie will be viewed by Microsoft Windows users, select the **Append file extension** check box.

5. Click **Save**.

Tips

- To play a PowerPoint Movie, make sure the computer you're using has QuickTime version 4.1 or later installed, and then double-click the PowerPoint Movie file.
- To control your PowerPoint Movie by advancing the presentation one slide at a time, add an action button to the slide master that hyperlinks to the next slide. Click **Slide Show > Action Buttons**, and then click a command.

Save a presentation as a Web page

Turning your presentation into a Web page allows you to share it with more people. Users need only a Web browser to see a Web presentation.

1. Open the presentation you want to save on the Web.
2. Click **File > Save as Web Page**.
3. Name your presentation, click a location, and then click **Web Options**.
4. On the **General** tab, type a title for your page in the **Web page title** box, and then click **OK**.
5. Click **Save**.

When you view a PowerPoint presentation in a Web browser, you can use the buttons on the slide control pane to advance through the slides.

Tips

- To publish a Web page on the Internet, ask your Internet service provider (ISP) about space and File Transfer Protocol (FTP) requirements.
- You can save your presentation as a self-running show for display at an unattended kiosk. First make sure that all transitions and animations are set to automatic. Click **Slide Show > Set Up Show**. Click **Browsed at a kiosk (full screen)**, and then click **OK**.



Communicating through Entourage

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Microsoft® Entourage® 2004 for Mac® is an e-mail program and a personal information manager (PIM) that makes it easy for you to communicate with others and organize your personal information. Be sure to see the new e-mail security features and Exchange support. The new Project Center, which helps you manage an entire collection of information and communications for a single project, is described in “[Managing Project Information](#)” on page 131.

This chapter describes the primary features of Entourage 2004 and explains how to perform tasks in each area of the product. For more information and for detailed procedures, look in Help. To find out what’s new in Entourage 2004, see **What’s New** on the **Learn** tab of the Project Gallery.

Setting up Entourage

The setup process required when you first start Entourage depends on the information that the Office 2004 Setup Assistant was able to detect on your computer and import during the installation of Office. For example, you may see that your account information, e-mail messages, and contacts have already been imported from a previous version of Entourage.

Set up e-mail accounts

Before you can use Entourage to send and receive e-mail, you’ll need to have an Internet connection. This connection might be through an Internet service provider (ISP) or a corporate network. You’ll also need to set up an account in Entourage that sends and receives your mail by using that Internet connection. As mentioned, Office 2004 attempts to import existing account information and e-mail messages during setup. If this information is not found, the Account Setup Assistant will appear when you start Entourage and step you through the setup.

If you are part of a large organization that uses an Exchange server, you would enter only your e-mail address, password, and domain. For other types of accounts, you may be asked for the following information, which you can get from your ISP or system administrator:

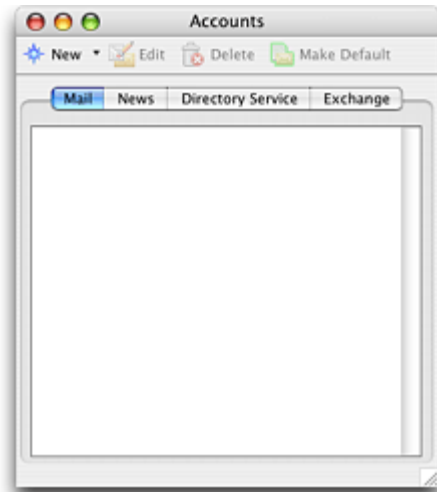
- The type of mail account you have: POP, IMAP, or Hotmail®
- Your e-mail address
- Your account ID and password

Note The account ID is not your full e-mail address. Typically, it is the text in your e-mail address before the at sign (@).

- The address of your incoming and outgoing mail servers (except for Hotmail accounts)

You can create multiple e-mail accounts for yourself if, for example, you want a Hotmail account, a home account, and a work account. If you set up multiple accounts, they will appear one after another in the folder list in Entourage. In addition to e-mail accounts, you can set up newsgroups and Internet directory services.

1. To set up an account, click **Tools > Accounts**, and then click the tab for the type of account you want to set up.



2. Click **New**.
3. Follow the instructions in the Account Setup Assistant to create the account.

To set up your account without the Assistant, click **Configure account manually**.

Note If you select the **Save password in my Mac OS keychain** check box while entering your account information, Entourage stores your password so that you do not have to enter it each time you connect to the server. However, if you save your password, anyone who has access to your computer also has access to your account.

To indicate which account you want to use as your default, select the account in the **Accounts** dialog box, and then click **Make Default**. This account will be processed first and will be used to send your Entourage mail.

Set up identities

When you install Office, an identity is created for you using the information you entered during installation. An identity stores information such as account settings and e-mail messages. When you set up Entourage, you might want to create multiple identities if more than one person uses Entourage on your computer, or you might want to copy an identity folder if you want to use Entourage on more than one Mac.

Create multiple identities

If more than one person uses Entourage on the same computer, separate identities will ensure that each person sees only his or her own messages, Calendar events, and other items, without having to log on to the computer as a separate user.

- ▶ To create a new identity or to switch from one identity to another, click **Entourage > Switch Identity**, and then follow the directions on the screen. Select the **Show this list at startup** check box so that each person is required to select his or her own identity whenever Entourage is started.

Note Identities have no passwords attached to them and are not secure. To make your identity information secure, set up multiple user accounts in the Mac OS preferences. (Click **Apple > System Preferences**, and then click **Accounts**.)

Import identities

The easiest way to copy your e-mail and PIM information from one Macintosh to another — for example between your desktop and laptop computers — is to copy the identity folder. When you installed Office 2004, an identity was either created for you or copied from a previous version of Office and placed in the following location on your computer: `Users/Username/Documents/Microsoft User Data/Office 2004 Identities`. That identity is called the Main Identity. If you've created other identities, they will be located here also.

- ▶ To copy an identity from one Macintosh to another, connect the two computers and drag the folder from one computer to the other.

Import e-mail and PIM information

You can import information that you created in other programs, including contacts, Calendar events, notes, tasks, messages, rules, signatures, and account information. You can also import many national and religious holidays to the Calendar.

- ▶ To import e-mail messages and contact information from another e-mail program, click **File > Import**, and then follow the instructions in the Import Assistant.

If the program you are importing from is not listed in the Import Assistant, you'll need to import your e-mail messages and contacts from text files, as described in "[Import and export contacts](#)" on page 98.

You can import PST files created in Outlook 2001 for Mac into Entourage by using the PST Import Tool. You can download the free PST Import Tool from the Download center at <http://www.microsoft.com/mac/download/>. System requirements and installation instructions are included on the Web site.

Synchronize with a Palm handheld device

If you have a Palm handheld device, you can synchronize items, including contacts, tasks, notes, and Calendar events, between Entourage and your handheld so that you have the same items on both computers. To install the necessary files on your computer, including the Entourage conduit, open the Additional Tools folder located inside the Microsoft Office 2004 folder. Double-click the **Handheld Sync Installer**, and then follow the directions on your screen.

new

Synchronize with Exchange

If you are part of an organization that uses an Exchange server to store your e-mail messages and PIM information, you can now access this information from Entourage after you set up an Exchange account.

- Your Exchange Inbox and all mail subfolders appear in Entourage and are synchronized continually with the Exchange server. When you address your e-mail messages, you can access the Exchange Global Address List, which contains the names of all users and distribution lists in your organization.
- Contacts stored in your Contacts folder on the Exchange server are synchronized with the Address Book and appear just as they do in Microsoft Outlook® on Windows-based computers.
- Calendar items stored in your Calendar folder on the Exchange server are synchronized with your Calendar in Entourage. When you create a meeting request in Entourage, you can see the free/busy information for other Exchange users in your organization.

Set up account security

You can use encryption and/or digital signatures to protect the e-mail messages you send.

new

- **Secure message contents** When you send a message, you can use encryption to protect the contents of the message so that it is unreadable to anyone other than the intended recipient.

new

- **Verify senders** When you send a message, you can use a digital signature, which assures the recipient that the message is really from you.

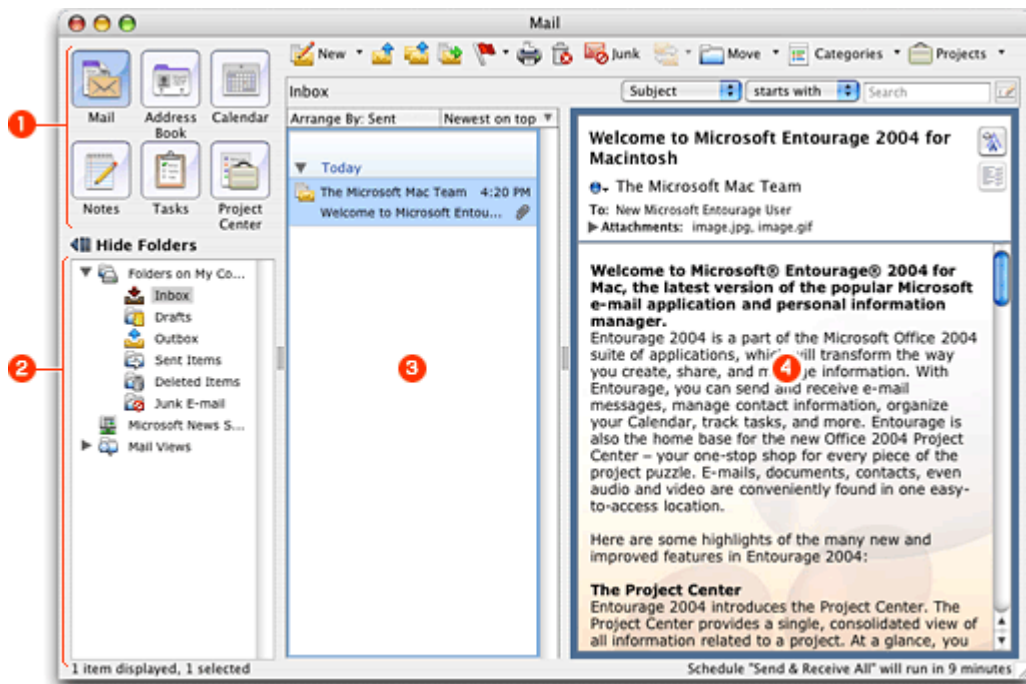
Before you can digitally sign or encrypt a message, you must obtain a digital ID and specify it in your account settings. To do so, click **Tools > Accounts**, and then select your account. Click the **Security** tab, and then enter the certificate information. For more information, search for “security” in Help.

Entourage includes additional security features to ensure that your computer and your e-mail messages are protected.

- **Virus protection** Because computer viruses are commonly spread through e-mail attachments, you can request that Entourage alert you before you open a message attachment. This gives you the opportunity to delete the message without opening the attachment. To turn on alerts, click **Entourage > Preferences**. Under **General Preferences**, click **Security**, and then select the options you want.
- **Internet connection security** Internet service providers and internal networks offer different levels of protection based on a variety of protocols, such as Secure Sockets Layer (SSL), SMTP authentication, and password protection. The security features available to you depend on your connection type. The information you need to enter in your account settings will be provided to you by your Internet service provider or network administrator.

The Entourage window

When you start Entourage, the Entourage window displays the contents of your Inbox for your default account.



- ❶ Navigation buttons ❸ Message list
- ❷ Folder list ❹ Preview Pane

▶ To switch from one Entourage feature area to another, click a navigation button.

With some variations, each feature area displays a list of the contents in the window. The list is arranged in columns, with one or two rows for each item. Some information about each item is also displayed in the preview pane.




▶ You can do any of the following:


- To see more details for an item, double-click it.
- To create a new item, click the **New** button.
- To sort the items in the list, click a column heading. Click it again to sort in the reverse order.

Communicating by using e-mail

When you send an e-mail message from Entourage, it goes to a mail server, most likely managed by your Internet service provider or belonging to your company network, before being sent through the Internet to its destination.

When you receive an e-mail message, it arrives first at an incoming mail server. What happens next depends on the type of account you have:

- **POP (Post Office Protocol)** Entourage connects to the mail server and then moves the messages to your computer. These messages appear in the Inbox under **Folders On My Computer** in the folder list. By default, messages are stored on the mail server only until you receive them. After that, they are stored on your computer until you delete them.
- **IMAP (Internet Message Access Protocol), Exchange, and Hotmail** Entourage connects to the mail server but does not move the messages to your computer; the messages remain on the mail server until you delete them. These messages appear in folders under the IMAP , Exchange , or Hotmail  folder in the folder list.

Note for POP You can set up a POP account to leave larger messages or copies of messages on the server. These messages still appear in the Inbox, even though they have not been downloaded. You can choose which of these messages you want to download by clicking  next to the message in the message list, and then clicking **Receive Entire Message at Next Connection** on the pop-up menu.

Notes for IMAP

- To receive messages in a folder you have subscribed to, click the folder in the folder list.
- To receive messages in a folder you have not subscribed to, double-click the folder in the right pane.

Notes for Exchange

- Depending on the network, new messages will either be displayed automatically as they arrive or will be displayed after Entourage completes a check for new messages on the Exchange server once every minute.
- Exchange caches (temporarily stores) messages on your computer so that you'll be able to continue working even if you cannot connect to the server.
- If you're traveling or don't want to connect to the server for a period of time, click **Entourage > Work Offline**.


View the message list


When an e-mail message arrives, you'll see it in your Inbox. Mail arrives at different times, depending on the following mail settings and how you're connected to the mail server:


- As soon as the message arrives. This is common for users connected to a network.
- Whenever you connect to the Internet — for example, for dial-up connections.
- Whenever scheduled. Click **Tools > Schedules**, and then click **New** to create a schedule for sending and receiving mail and for emptying the **Deleted Items** folder. At any time, you can click **Tools > Run Schedule** to perform the scheduled events immediately.
- Whenever you click **Tools > Send & Receive > Send & Receive All**. Only messages from accounts that are included in your Send & Receive All schedule are received.


Until you read a message, it appears in boldface at the top of the list, with a star preceding the name of the sender.


In addition to the star, you may see other icons in the narrow columns preceding the name. If you forget what an icon means, rest your pointer over the column heading.

 **Link** Indicates that this item is linked to another item. Double-click the link to select from a list of items.

 **Online status** Indicates whether the message resides on your computer or on the mail server (POP and IMAP only).

 **Message status** In addition to a star for unread messages, other icons indicate other statuses, such as whether you've replied to or forwarded this message.

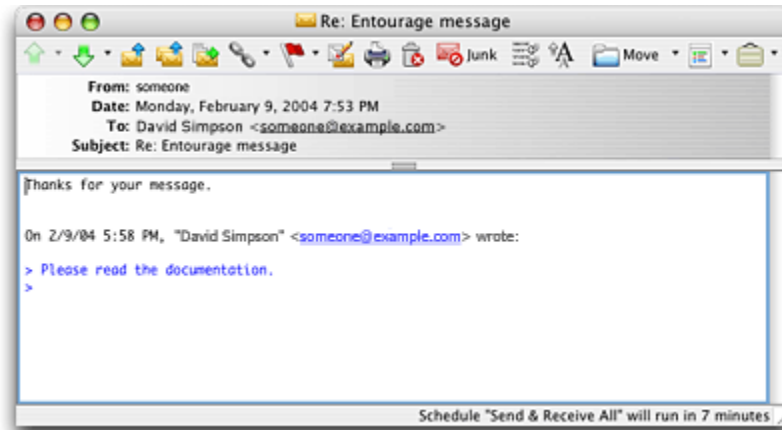
 **Priority** Indicates the priority level the sender set for this message.

 **Attachment** Indicates that the sender has attached a file to this message. Double-click the paperclip to open the attachment or to save it on your computer.






- ▶ You can adjust your view of the message list in many ways, including the following:
 - Drag the boundary area between the list and the preview pane to see either more messages or more of the preview pane.
 - Change the order in which the messages are listed by clicking a column heading to sort by that column. Click it again to sort in the reverse order.
 - Turn the display of the Preview Pane on or off or specify where you want it displayed. Click **View > Preview Pane**, and then click an option.

Read and respond to messages

- ▶ To read an e-mail message, double-click it in the message list.




You can also read a message in the preview pane by single-clicking it.

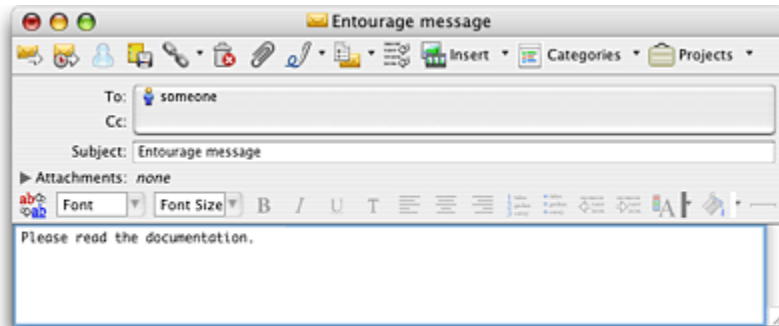
- ▶ With the message open or selected in the message list, you can do any of the following:
 - **Reply to it** Click **Reply** . The message form is automatically addressed to the original sender and **RE:** is inserted at the beginning of the subject line. Click **Reply All**  to reply to all original recipients. By default, the original message is included in the reply.
 - **Forward it** Click **Forward** . Enter the e-mail address of the person you want to forward the message to. You can also include a message of your own at the top. Attachments are also forwarded. **FW:** is inserted at the beginning of the subject line.
 - **Flag it** Click **Flag**  so that you know you need to follow up on the message.
 - **Move it** Click the message in the list and drag it to a folder. See [“Create folders”](#) on page 93 for more information.
 - **Delete it** Click **Delete** . Deleted messages are placed in the **Deleted Items** folder and can be retrieved until that folder is emptied. (Hold down CONTROL while you click the **Deleted Items** folder, and then click **Empty ‘Deleted Items’**.)


Tips

- To add the sender's e-mail address to your Address Book, click **Tools > Add to Address Book**.
- To open a compressed file you receive as a file attachment, double-click it. The Macintosh Stuffit program that ships with the Mac OS will expand the file for you.
- When you open an encrypted message, Entourage automatically decrypts the message. When you open a digitally signed message, Entourage uses the attached certificate (public key) to validate the private key used to digitally sign the message and determine that no forgery or false representation has occurred. A summary of the security information Entourage is able to determine is displayed in the **Info Bar** at the top of the message. For more information, click **View Details**.

Send a message

1. In the Mail window, click **New** .




2. In the **To** box, enter the e-mail address of the recipient, and then press RETURN.
3. Type a subject for your message. This is the subject that will appear in the recipient's message list.
4. Type your message.
5. Click **Send Now** .

For more details about this process, see the following sections.

Address the message

Entourage makes addressing your messages easy by displaying a list of names that match the letters you type in the **To** box. This list consists of contacts from your Address Book and the names of people with whom you have recently exchanged messages.

► Do any of the following:

- To enter multiple addresses, press TAB after each address.
- To select a recipient from your Address Book, click **Address Book** , select a recipient, and then drag the recipient's name to the appropriate field.
- Enter an address in the **Bcc** box if you don't want it to be visible to the recipients whose addresses are entered in the **To** and **Cc** boxes.

Format the message

With Microsoft Entourage, you can send and receive messages in two formats: Hypertext Markup Language (HTML), which is the default format, and plain text.

HTML This format is the standard for formatting text on the World Wide Web. With HTML, you can add special emphasis or structure to message text by applying a variety of formatting, including text formatting, numbering, bullets, alignment, and background colors. To further enhance message text, you can add a variety of multimedia elements, including pictures, sounds, movies, and background pictures.

Note E-mail programs that cannot read HTML may display an HTML message either as unformatted text or as a file attachment. In either case, the recipient can still read the text of your message. Also, messages in HTML format can be large and may take longer to send and receive, especially those that contain multimedia elements.

Plain text If you do not send a message in HTML format, Entourage automatically sends the message in plain text format. Plain text messages contain no formatting, so you can be sure that the message will look the same to a recipient as it does to you.


Tips

- To change the default message format, click **Entourage > Preferences**. Under **Mail & News Preferences**, click **Compose**. Select your formatting options under **General**.
- To change the message format for the message you're composing, click **Format > HTML**. A checkmark preceding HTML on the menu means that you're creating a message in HTML format. Also, if the **Formatting** toolbar is displayed in a message you're writing, you're using HTML format.

Notes

- When you reply to a message, Entourage keeps the message in the format in which it was sent.
- You can turn off HTML format in messages you send but not in messages you receive.
- Turning off HTML format in a message removes all text formatting and converts inline multimedia elements, such as pictures, into attachments.

Add your signature

- ▶ Use the signature feature to insert any standard text you want at the end of a message.
 - To create a signature, click **Tools > Signatures**, and then click **New**. Name the signature so that you can easily identify it, and then type the text.
 - To insert the signature at the end of a message, click **Signature** , and then select it from the list.
 - To automatically insert the signature at the end of all your messages, click **Tools > Accounts**, and then double-click the name of the account. On the **Mail** or the **Options** tab in the **Edit Account** dialog box, select a default signature under **Message Options**.

Attach a file or folder

- ▶ To attach a file or folder to a message, click **Add Attachments** , and then select the file or folder.

Your Internet service provider sets a limit to the size of the files you can attach, typically around 1 MG. If you're sending a large file, use a program such as Macintosh Stuffit, included with your Macintosh, to compress the file before sending it. Folders are automatically compressed when they are sent.

new


Encrypt a message or add a digital ID

Entourage 2004 allows you to encrypt a message so that it is unreadable to anyone other than the intended recipient. You can also digitally sign a message to assure the recipient that the message is really from you. To digitally sign a message or enable others to send an encrypted message to you, you first need to obtain a digital ID.

- To get an Internet digital ID, request one from a certification authority. For a list of certification authorities, visit <http://office.microsoft.com/assistance/>.

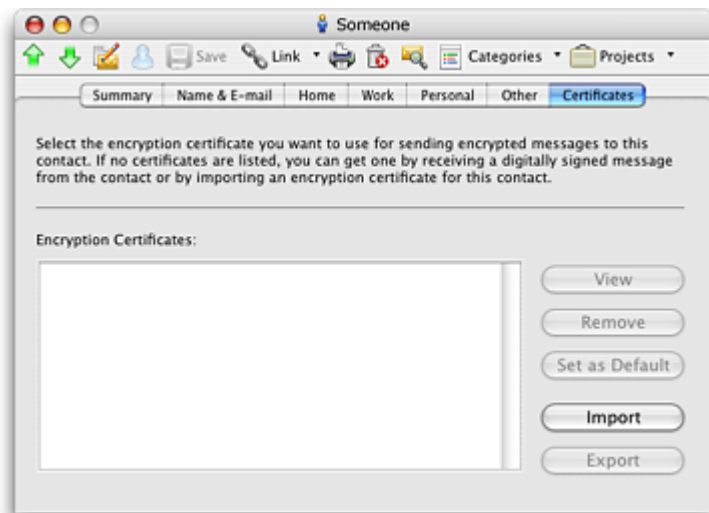
Most companies charge a small fee for their certificate services.

A digital ID consists of an irreplaceable private key, which is stored on your computer, and a public key, which you send to people when you send them a digitally signed message.

- To digitally sign and/or encrypt a message you're composing, click **Options** , and then click **Security > Digitally Sign Message** or **Encrypt Message**.

When you receive a digitally signed message, in the **Info Bar** at the top of the message, click **View Details**. On the **General** tab, click **Add to Contacts**. The certificate is stored with this contact and allows you to send encrypted messages to the contact.


You can view a contact's certificate at any time by opening the contact, and then clicking the **Certificates** tab.




Deliver the message

- To send a message, in the message window, click **Send Now** .

The message is placed in your **Outbox**, which you can see in the folder list. What happens next depends on your connection type:

- The message is sent immediately, either through a network connection or by first dialing up the modem connection.
- The message stays in the **Outbox** until you click **Send & Receive**  or until a scheduled Internet connection is established.

If you want to save your work but aren't ready to send the message, click **Save as Draft** . The message is moved to the **Drafts** folder in your folder list and can be reopened at a later time.

Create folders

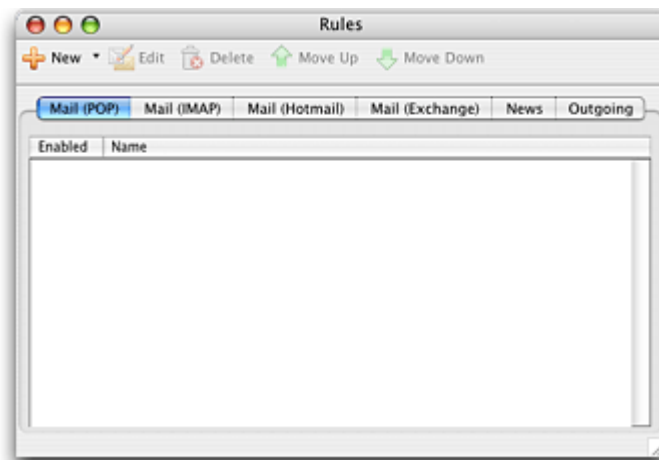
Entourage provides you with many options for managing the messages you receive. The primary method is the use of folders. By default, your folder list is displayed on the left side of the **Mail** window. For each account you create, Entourage provides the following folders: **Inbox**, **Drafts**, **Outbox**, **Sent Items**, **Deleted Items**, and a junk e-mail folder. You can create as many additional folders as you want, either under **Folders on My Computer** or under a specific account. Depending on the type of account you have, account folders may be located on a server or on your computer.

- ▶ Do any of the following:
 - To create a folder, click **File > New > Folder**. Name the folder, which appears in your folder list.
 - To create a subfolder, in the folder list, click the folder for which you want to create a subfolder. Click **File > New > Subfolder**. Name the folder, which appears in your folder list.
 - To move a message to a folder, select it in the message list, and then drag it to the folder.

Set up rules

You can set up rules to automate a variety of tasks. For example, you can set up a rule to place all mail received from a specific e-mail address directly into a specific folder.

- ▶ To set up a rule, click **Tools > Rules**. Click the tab for the account type, and then click **New**. If you have multiple accounts, you'll need to set up separate rules for each account. Select the criteria you want. For more information, search for "rules" in Help.



new

Group messages

You can group messages so that all messages about the same topic (with the same subject line) appear together in Entourage. Replies are indented, producing a cascading effect that makes it easier to follow the flow of the discussion. Groups can be expanded and collapsed to make it easier to focus on the most important messages.

- ▶ To view your messages by group, click **View > Arrange By > Show in Groups**, and then click **View > Arrange By > Subject**.

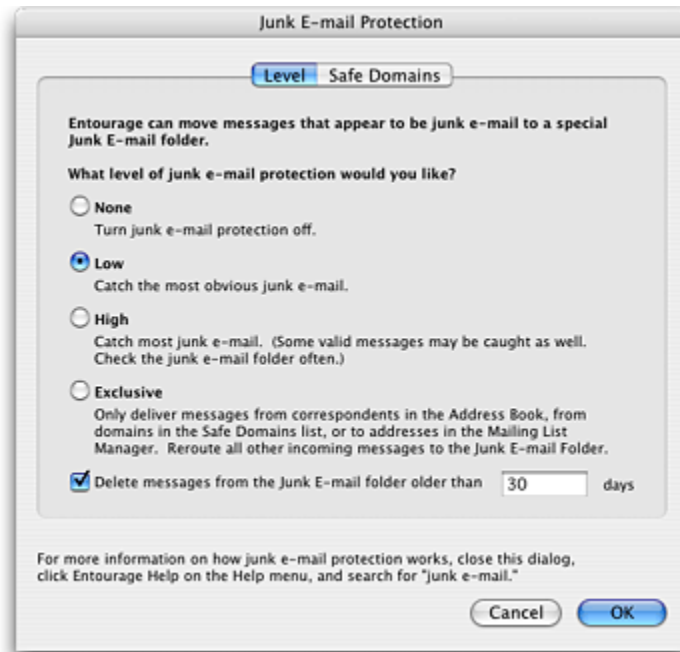
Click the arrow next to a group to see individual messages.

Use Junk E-Mail Protection

Junk E-mail Protection helps prevent junk e-mail (spam) from cluttering your Inbox. Entourage 2004 uses the Microsoft SmartScreen technology to make the filter more accurate in its detection of junk e-mail.

The filter identifies junk e-mail and places messages identified as junk e-mail directly into the Junk E-mail folder. It's a good idea to regularly check the contents of your Junk E-mail folder to see whether it contains messages that have been incorrectly identified as junk e-mail.

- ▶ To turn the junk mail filter on or off, or to change the level of filtering, click **Tools > Junk E-mail Protection**, and then choose the options you want.



- If a junk e-mail message is placed in your Inbox, select the message, and then click **Junk** on the toolbar. Entourage moves the message to the Junk E-mail folder.
- If a legitimate message is placed in your Junk E-mail folder, select the message, and then click **Not Junk** on the toolbar. Entourage moves the message to the Inbox and gives you some options to prevent similar messages from being classified as junk in the future.

Back up messages


You can back up your e-mail by copying it to a file and then moving the file elsewhere on your computer.

- ▶ Drag the message or the folder from Entourage to the desktop, and then move the file to the location of your choice. You'll need to drag subfolders individually.

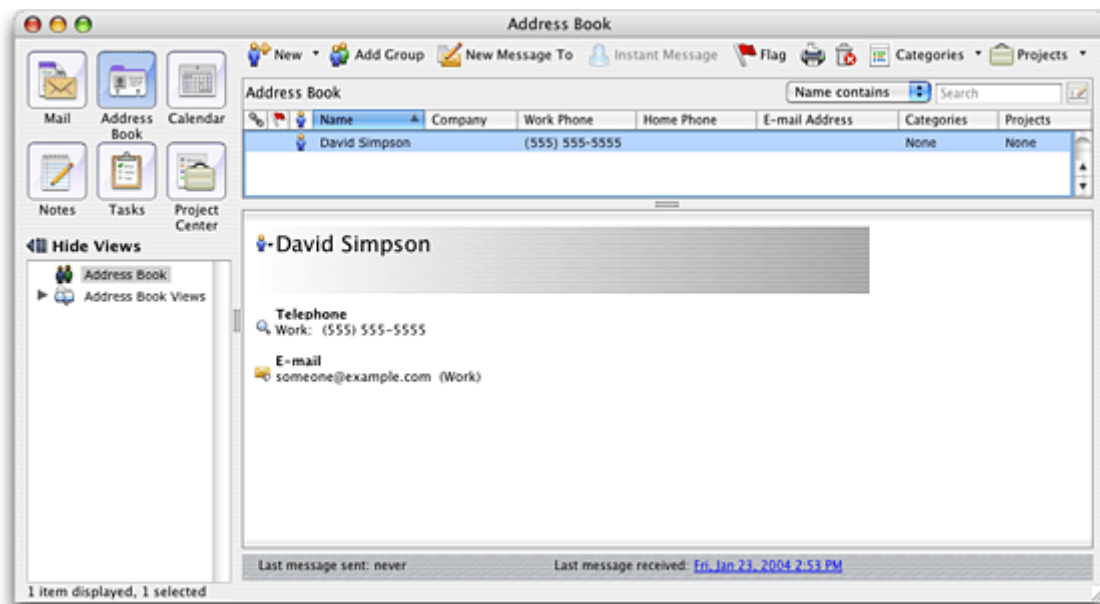
Because the MBOX text file that's created in this process is industry standard, you can use it to transfer messages to others, who can then import them into their own mail programs. This method is also an easy way to archive old projects so that you can delete them from Entourage.

Organizing contacts in the Address Book

The Address Book is a handy place to store the addresses and phone numbers of business contacts, friends, and family.






▶ To view your Address Book, click Address Book  in the navigation pane.

The Address Book window displays a list of contacts in the upper portion of the window and a preview pane in the lower portion. You can sort the list by clicking column headings, and you can double-click a row to open the details for a contact.








The Address Book provides views, rather than folders, that allow you to see a specific subset of your list. You can also view the list by category, project, or search criteria, as described in [“Managing information in Entourage”](#) on page 105.


In the preview pane and on the **Summary** tab of the contact window, you’ll see icons preceding different types of information. Click icons to do the following:

-  Connect to the Web to retrieve a map or driving instructions.
-  Open your Web browser and connect to this address.
-  Open an e-mail message displaying this address in the **To** box.
-  Display a magnified version of the phone number.
-  Create a recurring event in Calendar.

Create a contact

1. Click **Address Book** .
2. Click **New** .
3. In the **Create Contact** dialog box, enter the information you want for the contact, and then do one of the following:
 - To save this contact and close the **Create Contact** dialog box, click **Save & Close** .
 - To enter more information about this contact, click **More** and then enter any additional information you want.
4. Do one of the following:
 - To save this contact, click **Save** , and then click **Close**.
 - To create additional contacts, click **Save & New** .

Tips


- For contact information for which you include more than one entry, such as telephone numbers, e-mail addresses, and street addresses, the first one entered is the default unless you indicate otherwise in the contact window.
- When you install Office, a contact called the Me contact  is created for you, with the information you enter during setup. This information is shared by all Office programs. For example, it is used to add your name to comments that you add to Office documents.

In addition to tracking contact information, the Address Book interacts with other Office features:


- When you address a message, Entourage looks for contact information you stored in the Address Book and displays names from the list as you type. For more information, see [“Address the message”](#) on page 90.
- Word uses the names and addresses stored in the Address Book when you create data merge documents, such as mass mailings or address labels.

Create a group

You can create groups of contacts so that you can address an e-mail message to multiple people by group name.

1. In the **Address Book**, click **Add Group** .
2. Name the group. This is the name you'll enter in the **To** box when addressing an e-mail message to the group.
3. Click in the list box to add e-mail addresses to the group.
4. Click **Save**. The group name appears in your Address Book.

Print the Address Book

- ▶ To print your contacts, click **Print** , and then select the desired options. Click **Options** to specify which fields of information to include for each contact.

You can print selected contacts or the entire Address Book. The preview thumbnail will show you how the printed list will look.

Import and export contacts

You can import contacts into the Address Book from another program. Entourage has automated this process for some programs; for others, you'll need to import the information as a text file.

1. Click **File > Import**.
2. Click **Import information from a program**.
3. Select the program you want to import information from.
4. Click **Contacts**.
5. Locate the program on your computer or network, and then import the contact information.

If the PIM you want to import from is not on the list — for example, Outlook 2000, Outlook 2002, or Outlook Express 5 for Windows — you can import and export the entire Address Book as a tab-delimited text file, which is compatible with Entourage and most other PIM programs. To do so:

1. Export contacts from the source program. The contacts can be exported from any program, including spreadsheet and database programs. Check your program documentation to find out how to do this.
2. Transfer the exported file to your Macintosh by sending it as a message attachment to your Entourage account.
3. Click **File > Import**, and then click **Import from a Text File**. If the items of contact information stored in the text file are labeled differently from those in Entourage, you may need to specify (map) how the data fields in the source program correspond to the fields in Entourage. You can save this mapping in a file for future use. For more information, search for “import contact” in Help.

You can export your Entourage contacts to a text file that can be read by any PIM or word processing program.

- ▶ To export your contact list to a tab-delimited text file, click **File > Export Contacts**, and then name the file.

Tip You can import and export individual contacts in the standard vCard format, which is compatible with many other programs, including Outlook and Outlook Express for Windows. To send a contact as a vCard, select the contact in the Address Book, and then click **Contact > Forward as vCard**. To import a vCard, drag the attached .vcf file from the e-mail message to the Address Book window.

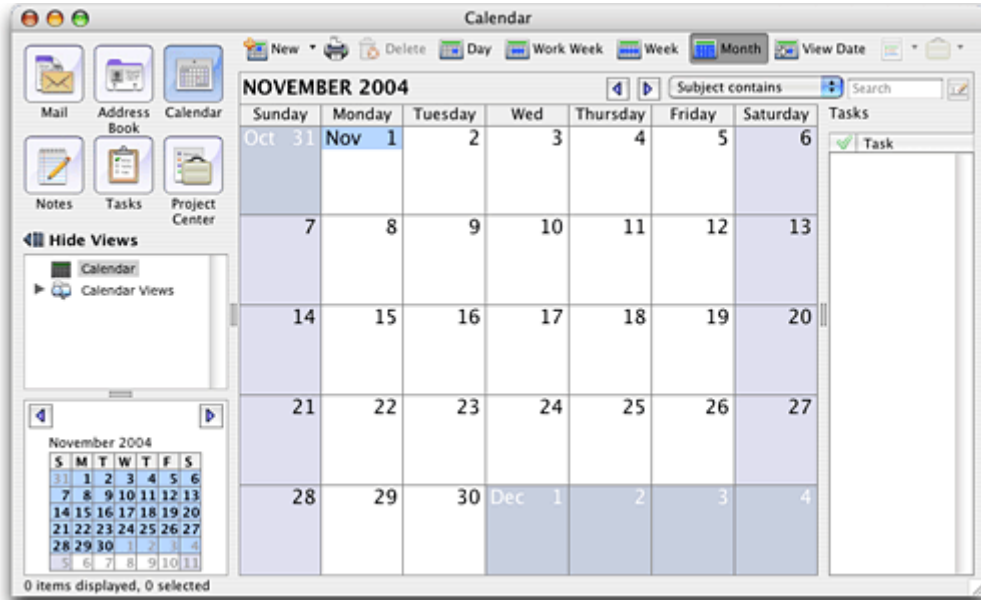
You can import PST files created in Outlook 2001 for Mac into Entourage by using the PST Import Tool. You can download the free PST Import Tool from the Download center at <http://www.microsoft.com/mac/download/>. System requirements and installation instructions are included on the Web site.


Creating events in the Calendar

The Calendar is an easy-to-use planner and scheduler that helps you keep track of your time. You can use it to schedule appointments and events, plan meetings, and set reminders. The Calendar offers many ways to view events, and you can customize it to suit your needs. You can even save the Calendar as a Web page to share with your friends and family.

- ▶ To view your Calendar, click **Calendar**  in the navigation pane.



The Calendar is displayed in the Month view, or whichever view was last used.



- ▶ When viewing information, you can do any of the following:
 - To maximize space for the Calendar view, click the **Calendar** menu, and then click to remove the checkmark from items that you don't want displayed: **Toolbars**, **Folder List**, or **Tasks Pane**.
 - To change views, click a view button at the top of the Calendar. To display the current view in list format, click **Calendar > List**.
 - To change dates, click a date in the mini-calendar under the view pane, or click the previous or next buttons above the mini-calendar. You can view a specific date range, up to six weeks long, by dragging your mouse over the dates you want to view in the mini-calendar.
 - To quickly display a specific date, click **View Date** , and then enter the date you want.

Create an event

You can schedule events in the Calendar just as you do with a paper planner or wall calendar. You can arrange an all-day or multi-day event, such as someone's birthday or a vacation, or an event of shorter duration, such as a dental appointment or a business meeting. Events can appear in the Calendar one time, or they can recur at intervals you specify. To do so:

1. Click **Calendar** .
2. Click **New** .
3. In the **Subject** box, type the name or other identifying information about the event.
4. To specify a place for the event, type it in the **Location** box.
5. Enter the dates and times that the event will start and end.
6. Select any other options you want.

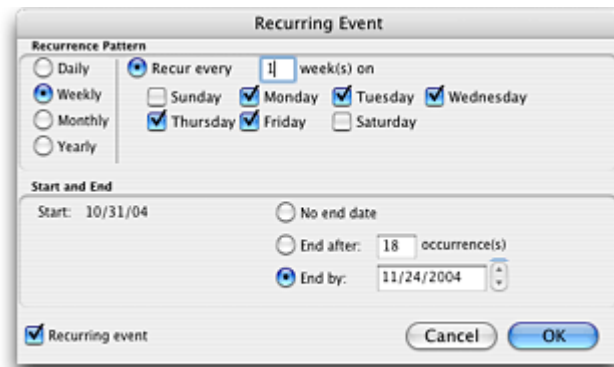
Tip You can also create a new event by double-clicking the date and time of the event in Day, Work Week, and Week views. The correct date and time are automatically entered in the new event window. You can create a new all-day event by double-clicking the day header in Day, Work Week, and Week views, or by double-clicking a day in Month view.

Entourage provides a variety of options to make using your Calendar even more useful:

- **Recurring events** Entourage automatically inserts each occurrence into your Calendar at the intervals you specify. See "[Recurring events](#)" on page 102.
- **Reminder** Entourage displays a reminder on your screen before the event. By default, this is 15 minutes.
- **Travel time** Entourage adds the time you specify here to the reminder time to determine when to display the reminder on your screen. Travel time is displayed as a yellow bar before and/or after the event on your Calendar.
- **All-day events** Click the **All-day Event** box if the event you're entering lasts the entire day or is associated with no particular time of day. All-day events appear at the top of the list in Day view, and in all views, Entourage displays the day shaded to indicate an all-day event. You can create an event that spans multiple days by specifying the date range when creating the event.



Recurring events



- ▶ To specify an end date for a recurring event, click **Edit** in the event window, and then do one of the following:
 - To create an event that recurs a specific number of times, click **End after**, and then type the number of times the event occurs.
 - To create an event that recurs until a specific date, click **End by**, and then enter the date of the last event.



Set up a meeting

You can schedule events that you want to invite others to, such as meetings.


1. In the Calendar, create an event as described in [“Create an event”](#) on page 101. Or double-click an existing event that you want to invite others to.
2. Click **Invite** .
3. In the **Invite** box, do one of the following:
 - To invite a person or group in the Address Book or with whom you have recently exchanged e-mail, type the first few letters of the name, and then click the appropriate name on the pop-up menu. To select names from the Address Book, click **Address Book** .
 - To invite someone who is not in the Address Book or with whom you haven't recently exchanged e-mail, type the person's e-mail address, and then click **Add**.

4. If you and the other attendees are Exchange users, click the **Scheduling** tab and check their schedules to find an available time slot. Busy times are represented by a shaded bar. Make sure you've selected your Exchange account in the **From** box.
5. Click **Send Now**  or **Send Later** .

Notes

- If you're an Exchange user or if the recipient's e-mail program supports Internet Calendaring (iCalendar), the recipient can use e-mail to accept, tentatively accept, or decline your invitation.
- If you are using an Exchange account, you can specify another person as a delegate to act on meeting requests on your behalf. Before someone else can access and manage your meeting requests, you must add the person as a delegate. If you are using Microsoft Exchange Server 2000 or later, you can use Entourage to add a delegate. For more information, search for "delegate" in Help.


Send event cancellation notices

1. In the Calendar, double-click the event that you sent invitations to.
2. Click **Cancel Invitations** .

A message is displayed asking if you want to send a cancellation notice to those invited to the event.
3. Do one of the following:
 - To send a cancellation notice with comments, click **Yes, with comments**.
 - To send a cancellation notice without comments, click **Yes, without comments**.
 - To cancel an event without sending a cancellation notice, click **No**.
4. Click **OK**.


Print your Calendar

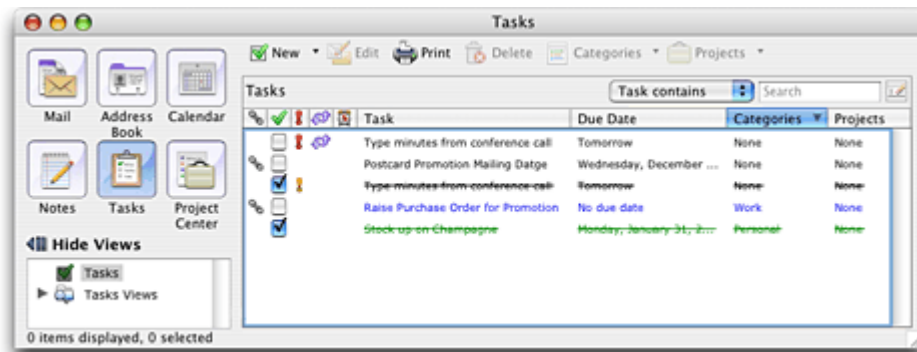
Entourage 2004 gives you many new options for printing your Calendar so that it looks good and includes the information you want.

- ▶ To print your Calendar, in the Calendar window, click **Print** . Select the view and the dates you want. Click **Layout** for more printing options.






Creating a to-do list in Tasks


Whether you have daily tasks to track or tasks for an ongoing project, such as planting and maintaining a garden, you can create and manage a list of these tasks in Entourage. And you can choose to receive timely reminders as the tasks become due.

- ▶ To view your complete list of tasks, both present and future, click **Tasks**  in the navigation pane.



The icons that appear as column headings provide additional information about the task:

-  Indicates that a task is linked to other items in Entourage. Double-click the link to open the linked items.
-  Indicates whether the task is complete. Click the box to mark a task as complete.
-  Indicates the priority of the task (highest, high, low, lowest).
-  Indicates that a task is scheduled to repeat.
-  Indicates that a reminder has been set for the task.

- ▶ To create a task, click **New** . Name the task, and then choose the options you want.

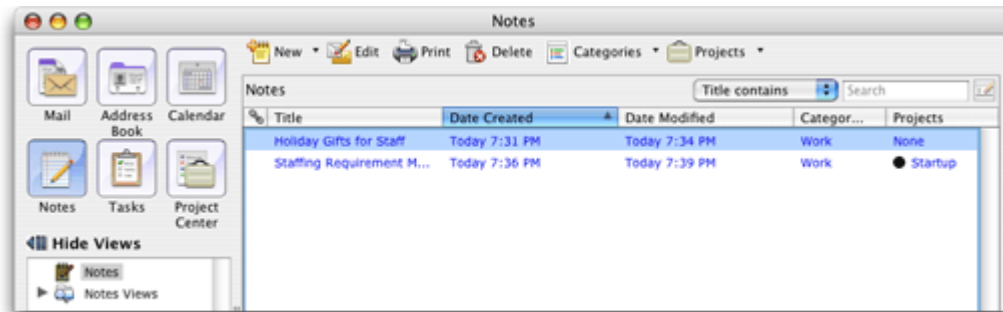
You can assign the task to a category and/or project so that you can display it in a task view.

- ▶ To view your current tasks at the same time you're looking at your Calendar events, click **Calendar > Task Pane** in the Calendar window.

Creating notes

Create electronic notes in Entourage just as you would sticky notes. Use notes to jot down Web addresses, questions, or ideas. You might want to create a note relating to a task you've entered and then link the two.

- ▶ To view your note list, click **Notes**  in the Entourage navigation pane.



You can sort the list by clicking any of the column headings. Entourage provides the custom Notes views you see listed in the Views pane.

- ▶ To create a note, click **New** . Name the note, and then type the text.

You can format the text using any of the options you see on the toolbar.

Managing information in Entourage

As your Entourage lists grow, it's important to be able to find the information you need. In e-mail, you can create folders to help you stay organized. See [“Create folders”](#) on page 93 for more information.

Entourage offers several additional ways to find and organize information. And if you're working on a project, be sure to use the Project Center, new in Office 2004, which keeps track of all the types of information associated with that project. The Project Center is described in [“Managing Project Information”](#) on page 131.

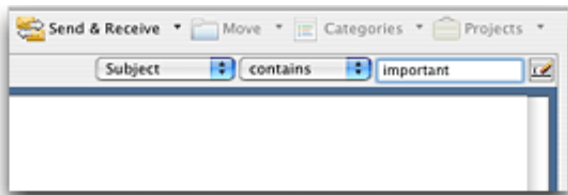
Find and Advanced Find

- ▶ To search for text in one or all areas of Entourage, click **Edit > Find**. For more options, click **Edit > Advanced Find**.

The items in which the text is found are displayed in a Search Results window.


Search

In the main window of each of the Entourage feature areas, you'll see a Search box in the upper-right corner of the window. Use this box to search for a subset of the list of items currently displayed in the window.




- ▶ In the first box, click an option to indicate how you want to search the list. In the text box, type the text you want to find.

As you type, Entourage narrows the choices shown in the list. The label **(Search Results)** appears above the list as a reminder that you're seeing only a portion of the list.

- ▶ To display the entire list again, click **Clear** .

Categories

You can organize all types of items in Entourage — such as messages, Calendar events, and contacts — into categories so that you can more easily find the information you need. Each category is associated with a color so that you can tell at a glance which items belong to which categories. And you can sort and filter items in a list by category.

- ▶ To assign an item to a category, select it in the list, click **Categories** , and then select a category.

When you assign a contact in the Address Book to a category, all messages you receive from that contact are assigned to the same category as the contact. (You can change this default in **Preferences** on the **Entourage** menu.)

Entourage provides you with several default categories to which you can assign items. In addition, you can create your own categories.

To create your own category, click **Categories > Edit Categories > Add Category**.



Communicating by Using MSN Messenger

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MSN® Messenger for Mac 4.0 is an instant messaging program that you can use to communicate in real-time with your colleagues, family, and friends. To send instant messages, you and the person you want to communicate with must have MSN Messenger installed and be connected to the MSN Messenger server.

You can communicate with MSN Messenger users on many platforms — Macs, Windows-based computers, and mobile devices and pagers. You can send text, files, audio, and graphics just as you do with e-mail. You and a friend can even browse the Web together!

This chapter describes the primary features of MSN Messenger and explains how to use them. For more information and for detailed procedures, look in Help.

Setting up .NET MSN Messenger service

When you install Office 2004, a program icon for MSN Messenger is placed in the Dock. Click the MSN Messenger icon to install the program, or double-click the icon in your Applications folder. You can also download it for free from the Microsoft Web site at <http://www.microsoft.com/mac/>.

Before using MSN Messenger, you'll need to sign up for the .NET MSN Messenger service, which is also free. To use this service, you'll need to have credentials on the Microsoft Passport Network. Passport Network is a service offered by Microsoft that enables you to use your credentials (e-mail address and password) to sign in to all Passport Network participating sites and services. This is the e-mail address and password you'll use to sign in to MSN Messenger.

If you use Hotmail, or MSN is your Internet service provider, you already have credentials on the Passport Network. If you need to create credentials to use on the Passport Network and/or would like more information about Passport Network credentials, go to the Microsoft Passport Network Web site at <https://accountservices.passport.net/ppnetworkhome.srf>.

Signing in

- ▶ To sign in to MSN Messenger, click the MSN Messenger icon in the Dock. Click the **Sign in** link in the Startup window, and then enter your e-mail address and password. You can choose to sign in with a status of **Online** or **Invisible**, as described in the following section.

If you have problems signing in, see the troubleshooting topics in Help. You can check the status of the .NET server and request support at <http://messenger.msn.com/Status.aspx>.

Tip To start MSN Messenger whenever you start your computer, click **MSN Messenger > Preferences**. On the **General** tab, under **General**, select the **Run this program when I start my computer** check box.

The MSN Messenger window

When you start MSN Messenger, you'll see the MSN Messenger window, which displays your status and contact list.



If you choose the **Online** status when you start MSN Messenger, your contacts who are online will see that you're online.

- ▶ To change your status, click the MSN Messenger icon preceding your name, and then select a status from the list.

Notes

- If you select **Invisible** as your status, you'll appear to others to be offline, and your contacts won't be able to communicate with you. You'll be able to see which contacts on your list are online, but you won't be able to communicate with them.
- By default, your status changes to **Away** whenever you haven't used your computer for five minutes. You can turn this option off or change the time period in **Preferences** on the **General** tab.

- ▶ Click an icon at the top of the MSN Messenger window to do any of the following:
 - **Add** Add a contact.
 - **Send** Select a contact to whom you want to send a message.
 - **Send File** Select a contact to whom you want to send a file or photo. The file is sent as soon as you identify it.
 - **Page** Send a text message to a pager.
 - **Mail** Switch to Entourage or your Hotmail account. A new e-mail message is created with the transcript of the conversation in the body of the message.

Even if you close the MSN Messenger window, the program continues to run so that you can receive notifications and instant messages.

- ▶ To display the MSN Messenger window once you've closed it, on the MSN Messenger menu bar, click **View > Contact List**.

The bottom portion of the MSN Messenger window shows you some current topics from MSN. Click in this area to open MSN in your browser.

- ▶ To turn the display of this pane on and off, click **View > Promotional Pane**.

Creating a contact list

You can send an instant message to anyone who uses MSN Messenger. If you're going to send messages to certain people regularly, you can add them to your contact list to avoid typing their addresses each time you send messages.

- ▶ To add a contact, click **Add** in the MSN Messenger window.

If you don't know the contact's e-mail address or sign-in name, click **Contact > Search For a Contact**. MSN Messenger attempts to find the name you enter by checking the MSN Member Directory. Contacts must have the MSN Messenger program installed and credentials (e-mail address and password) to sign in to the Passport Network. If you attempt to add a contact who doesn't have credentials on the Passport Network or the MSN Messenger program, you have the option to send an e-mail message inviting him or her to download the program and create credentials for the Passport Network.

Manage your contact list

You can have up to 150 contacts in your contact list.

- ▶ You can do any of the following with your contact list:
 - To change the order in which your contacts appear in the contact list, click **Contact > Sort Contacts by**, and then select an option. You can view your contact list by group, by whether contacts are online or offline.
 - To save your contact list outside MSN Messenger, click **File > Save Contact List**, and then name the file. You can share your contact list with a friend by sending the file as an attachment to an e-mail message or an instant message.
 - To import a contact list that has previously been saved to a file, click **File > Import Contacts From a Saved File**, and then locate the file. MSN Messenger won't import duplicate entries.

Tips

- If you are going to send the contact list file to a Windows MSN Messenger user, add a .ctt file name extension when you save the file.
- If you want to delete some of the contacts before you send your list, you can open the list and edit it in TextEdit, the Macintosh text-editing program located in your Applications folder.

Create groups

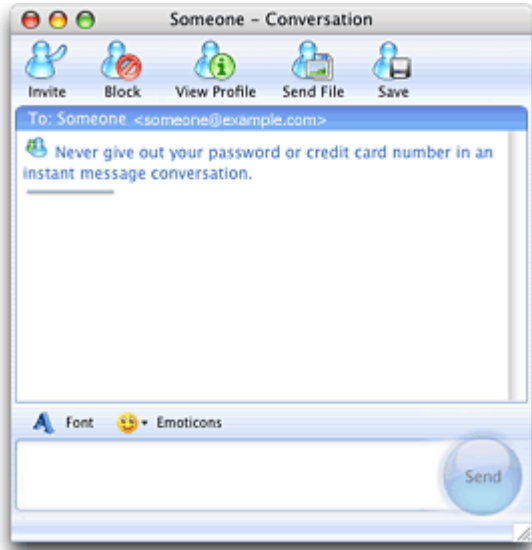
You can organize your contacts by putting them into groups. MSN Messenger provides the following groups to get you started: Friends, Coworkers, and Other Contacts (the default group). When you import a contact list, a new group composed of this list is created automatically.

- ▶ When working with groups, you can do any of the following:
 - To create a group, click **Contact > Add a Group**. In the MSN Messenger window, type the group name.
 - To move a contact from one group to another, click the contact and drag it to another group.
 - To copy a contact to another group, hold down OPTION as you drag.

Messaging

- ▶ To initiate a conversation with another MSN Messenger user, in the MSN Messenger window, click **Send**, and then select a recipient. Or click **Contact > Send Instant Message**, and then select a recipient. To send a message to someone not in your contact list, click **Other**, and then enter that person's address.

You'll see the conversation window, addressed to the recipient you selected.



- ▶ To send an instant message, type your text in the bottom portion of the window, and then click **Send** (or press ENTER).

When typing your message, you can do the following:

- Click **Font** to select the font, font style, color, effects, and size of the text for your message.
- Click **Emoticon** and select a picture to express emotion.

You'll be notified that the message has been sent or received. Only recipients who are online when you send the message will receive it.

When the recipient responds, you'll see both sides of the conversation displayed in the main body of the conversation window.

Click an icon at the top of the conversation window to do any of the following:

- **Invite** Invite another MSN Messenger user into the conversation. A message will automatically be sent to that person.
- **Block** Prevent someone you specify both from contacting you and from seeing your online status.
- **View Profile** Display a personal description that the selected contact has posted.
- **Send File** Send a file or photo to someone in the conversation.

By default, no record of the conversation is kept. However, you can save messages, as described in [“Saving messages”](#) on page 115.

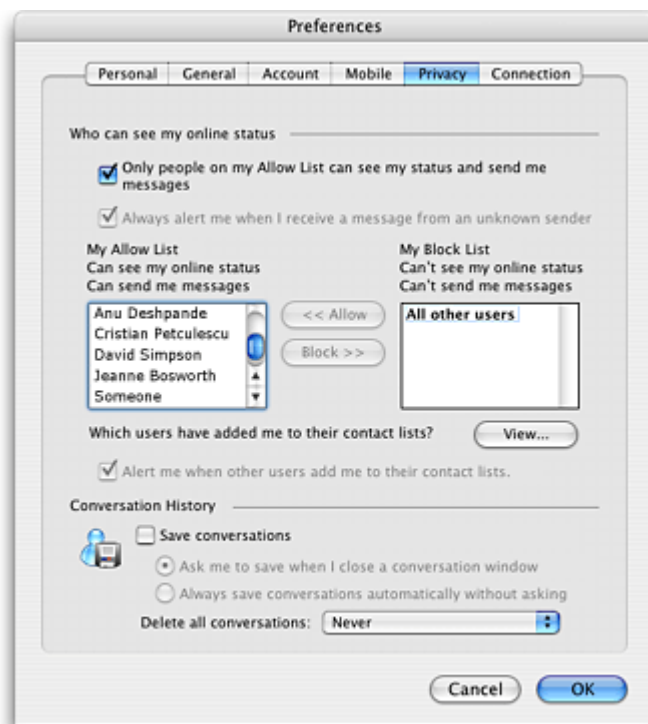
Setting privacy options

You can control the amount of personal information you make available to other MSN Messenger users in several ways.

Block messages

You can avoid receiving messages from other MSN Messenger users by blocking them. Blocking messages causes your status to appear as offline to the specified users.

- ▶ You can block messages in the following ways:
 - To block messages from someone during a conversation, click **Block** on the toolbar.
 - To block messages from a specific person in your contact list, click **MSN Messenger > Preferences**. On the **Privacy** tab, click the name in the **My Allow List**, and then click **Block**, which moves it to the **My Block List**.
 - To block messages from all users not in your contact list, click **MSN Messenger > Preferences**. On the **Privacy** tab, click **All Other Users** in the **My Allow List**, and then click **Block**, which moves it to the **My Block List**.

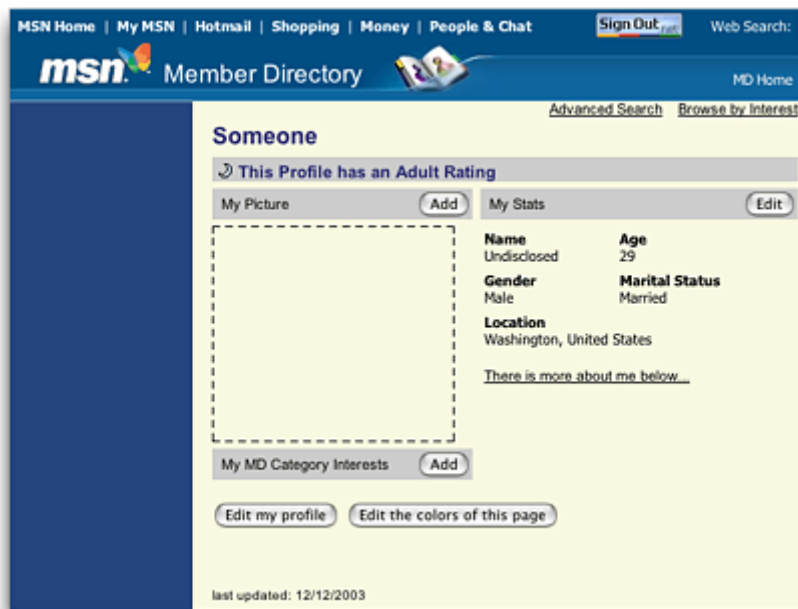


Create a profile

You can post a public profile to provide personal information to other Passport Network users.

- ▶ To create or change your public profile, click **MSN Messenger > Preferences**. On the **Personal** tab, under **My Public Profile**, click **Edit Profile**.

A Web page opens, and you can create or change the description of yourself that other Passport Network users can see. You'll need Internet Explorer 4.5 or later or Netscape Navigator 4.0 or later to do this.



- ▶ To view a contact's profile, click the contact name in the MSN Messenger window, and then click **Contact > Manage Contacts > View Profile**.

Receive alerts

Alerts with accompanying sounds are displayed in their own message box in the upper-right corner of your screen. An alert can be displayed for any of the following reasons:

- **Sign-in alert** Lets you know when a contact signs in. Click the alert to start a conversation with that contact.
 - **Instant message alert** Signals that you have received a message in MSN Messenger.
 - **E-mail alert** If you have a Hotmail or an Entourage account, lets you know when new e-mail messages arrive.
- ▶ To change when and how alerts are displayed, click **MSN Messenger > Preferences**. On the **General** tab, under **Alerts**, choose the options you want.

Saving messages

By default, conversations are deleted when the conversation window is closed.

- ▶ You have two options for saving your conversations:
- To save the current conversation, click **File > Save As**, and then name the file.
 - To automatically save all conversations, click **MSN Messenger > Preferences**, and then click the **Privacy** tab. Select the **Save Conversations** check box, and then click the option you want.

After you archive a conversation, you can view it at any time.

- ▶ To view an archived conversation, click **View > Conversation History**. In the **Message Archiving** list, click the contact that you want to view your past conversations with. In the right pane, click the date the conversation occurred. To search for specific text, type the text in the search box at the top right of the **Conversation History** dialog box.

Office integration

MSN Messenger is an integral part of Office 2004 and is integrated with other Office programs as follows:

- When you receive an e-mail message from someone in Entourage, you can add that person to your MSN Messenger contact list.
- When you create a new contact in Entourage or MSN Messenger, you have the option of adding the contact information to both programs.
- Each contact card in the Address Book contains an integrated MSN Messenger menu. On the **Summary** tab of a contact, click the icon preceding the name. You can use this menu to quickly sign in to MSN Messenger.
- You can see the online status of project team members and colleagues in the Project Center in Entourage, and you can initiate a messaging conversation with them without switching to MSN Messenger.

When working on a document that has been reviewed in Word, you can see in the comment bubbles whether the reviewers are online; if they are, you can initiate a conversation with them. You'll also be able to transfer a document by using the MSN Messenger service without switching to MSN Messenger.



Sharing Information

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No program is an island. This chapter provides a larger context for your work in the Office programs and describes how you can share content and documents in a way that allows you and your colleagues to work most efficiently.



This chapter covers the general Office features that you can use to share information, together with new features, such as the Compatibility Report, designed to make sharing easier and more productive.

Sharing Office information

After you enter information into an Office document, you can usually copy that information and paste it into another document, even those created with a different Office program.

Copy and paste information

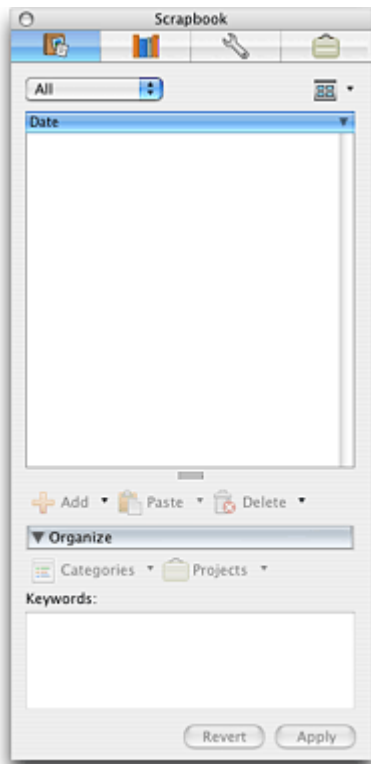
The most common method of copying information to one or more destinations is by using the **Copy** and **Paste** commands. Buttons for the **Copy** command  and the **Paste** command  are located on the **Standard** toolbar of all Office programs. You can also find the same commands on the **Edit** menu.

1. Select the information to be copied, and then click **Copy** . When you copy information, it's placed on the Clipboard.
2. Click where you want to insert the information, which may be in another document in a different Office program, and then click **Paste** . You can repeat this action to paste information into multiple locations.

When information is placed in its new location, you'll see a smart button. Click the button to select a paste formatting option.



If you plan to copy multiple items before pasting or if you want to reuse items sometime in the future, copy the items to the Scrapbook. To display the Scrapbook, click **Tools > Scrapbook**. You can add a selected item to the Scrapbook either by dragging it or by clicking **Add**.



Drag information

You can drag (move) selected text and graphics from one document to another, in the same or a different Office program.


1. Position the document windows next to each other on your screen.
2. Select the information and drag it to the destination window. You'll see a shadow of the item as you drag.

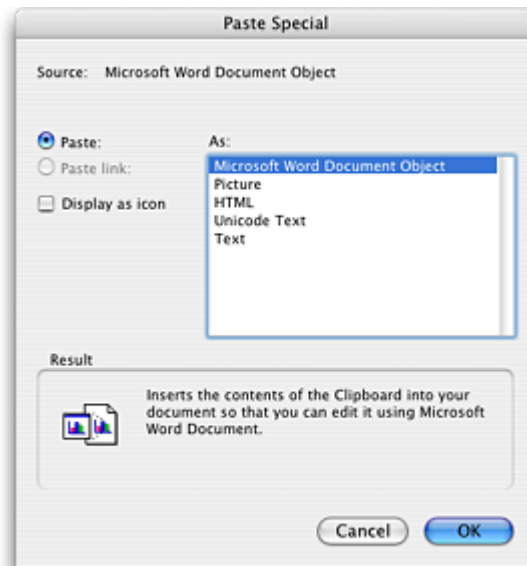
Using Paste Special: embedding vs. linking

You can use the **Paste Special** command to embed or link an object that you copied to another document.

Embed You can embed an object, such as a chart or a table, that you created in one document into another document. When you embed, the item becomes an object in the new document. If you want to change the content of the object, you can double-click the object to edit the data in the source document.

Link The data remains in the source document and is updated in the destination document when it is changed in the source document. Linking is a good method to use if you want to keep the size of the destination document small.

1. In the source document, select the item you want to embed or link.
2. Click **Copy** .
3. Switch to the destination document, and then click where you want the information to appear.
4. Click **Edit > Paste Special**.
5. To create an embedded object, click **Paste**. In the **As** box, click the appropriate entry. To create a linked object, click **Paste link**. (Note that linking is not available in PowerPoint.)



Save pictures as files

You can copy and paste pictures from one place to another in your documents. You can also save a picture from a document to a separate file.

- ▶ Hold down CONTROL while clicking the picture, and then click **Save as Picture**. You can save the picture in any of the graphics formats you see in the **Format** list.


Choose a format appropriate for the program and operating system it will be used in, as described in “[Pictures](#)” on page 125.

Copy Word elements into PowerPoint

- ▶ To copy a Word table into a PowerPoint presentation, select the table in Word, and then click **Edit > Copy**. In PowerPoint, with a slide displayed in normal view, click **Edit > Paste**.
- ▶ To convert a Word outline or document created with heading styles to a PowerPoint presentation, open the document in Word, and then click **File > Send To > Microsoft PowerPoint**.

A new PowerPoint presentation is created. Each paragraph formatted with the Heading 1 style becomes the title of a new slide, each paragraph formatted with the Heading 2 style becomes a first level of text, and so on.


To copy a Word document into a PowerPoint presentation:

1. In the Word document, select the content you want to copy, and then click **Copy** .
2. In the PowerPoint presentation, click the slide you want to insert the content into.
3. Click **Edit > Paste Special**.
4. Click one of the following:
 - To paste the content so that you can size and position it as you would a picture, click **Picture**.
 - To paste the content as an object that you can edit in Word, click **Microsoft Word Document Object**.
 - To paste the content as text, click **Formatted Text (RTF)**, **Styled Text**, or **Unformatted Text**.

Use Excel elements in Word and PowerPoint

- ▶ To embed or link an Excel chart in your Word document or PowerPoint presentation, use the **Paste Special** command to paste the chart as a Microsoft Excel Chart Object. For more information, see [“Using Paste Special: embedding vs. linking”](#) on page 120.

You can also copy Excel worksheet cells into a Word document or a PowerPoint slide:

1. On your worksheet, select the range you want to copy, and then click **Copy** .
2. Switch to your Word document or PowerPoint presentation, and then click the location where you want to insert the cells.
3. Click **Edit > Paste Special**.
4. Do one of the following:
 - To paste the cells so that you can size and position them like a picture, click **Microsoft Excel Worksheet Object**.
 - To paste the cells in Word as a table you can resize and format, click **Formatted Text (RTF)**.
 - To paste the cells as text separated by tab stops, click **Unformatted Text**.
5. In Word, to keep only the current results of any formula, click **Paste**. To keep the copied information up-to-date as the original data changes in Excel, click **Paste Special**, and then click **Paste link**.
6. In PowerPoint, click **OK**.

Export PowerPoint presentations to Word

- ▶ To export a PowerPoint presentation to a Word document, click **File > Send To > Microsoft Word**. A new Word document is created, with each slide title formatted as a Heading 1.

Copy Entourage contacts to Word

- ▶ To insert contact information from your Address Book directly into your Word documents, on the **Tools** menu, click **Address Book**, click the contact you want, and then click **Insert**.

Tip You can also use your Address Book as the source file for a data merge in Word. For more information, see [“Working with mass mailings”](#) on page 37.

Sharing documents with users of other versions of Office

- ▶ To share Office 2004 documents with people using earlier versions of Office or with people using Office for Windows, click **File > Save As**. In the **Format** box, select the version in which you want to save the document. See the **Description** box for an explanation of a selected format. If you’re sending the document to an Office for Windows user, select the **Append file extension** check box.

The Office program adjusts the formatting so that it can be read in an earlier version.

new

Check compatibility

The file formats for different versions of Office are compatible, including versions for the Mac and for Windows. However, differences in features can create some specific compatibility issues. Use the Compatibility Report, new in Office 2004, to check your document. The Compatibility Report scans a document and flags potential compatibility issues. You can then choose to address those issues before sending out the document so that you can be confident that the document will appear to the recipient as you intended it to.

To check a document for compatibility:

1. Click **View > Toolbox**, and then click **Compatibility Report**.



2. If you know which version the recipient is using, select it. Only compatibility issues relevant for that version are reported.
3. Click **Check Document**. Office checks the document and flags all compatibility issues.
4. Select the issue and read the description.
5. Do one of the following:
 - To ask Office to make the necessary changes to the document, click **Fix**, if available.
 - To skip the issue, click **Ignore**.
 - To get more information, click **Help**.

You'll be notified of unresolved issues when you save the document. You can choose to ignore these issues or view the Compatibility Report for further information.

Ensure document compatibility

This section includes information that will help you to ensure maximum compatibility when sharing Office for Mac documents with Office for Windows users.


Fonts

The standard Macintosh TrueType fonts use different font metrics from the standard Windows fonts. Even a short document can have different line and page breaks when you move it to the other operating system.

- ▶ To minimize font-mapping difficulties, use the Times New Roman, Arial, Courier New, or Wingdings font when sharing documents between a Macintosh and a Windows-based computer.

Printer drivers

Because Office programs on the Macintosh and on Windows-based computers use different printer and display drivers, the same document printed to the same printer from the two operating systems can have different line and page breaks.

- ▶ To ensure proper line and page breaks, use **Print Preview**  before printing.

Pictures

Each operating system manages screen and printer interaction differently to draw an object, and each uses its own graphics file format. However, cross-platform conversion takes place automatically, so the differences are subtle.

Notes

- When you insert pictures, it is a good idea to save them in a graphics file format that is common to both operating systems, such as Portable Network Graphics (PNG), Joint Photographic Experts Group (JPEG), or Graphic Interchange Format (GIF).
- If color fidelity is important, use pictures saved in Portable Network Graphics (PNG) format. (For PowerPoint, make sure those viewing your presentation are using PowerPoint 2000 or later.)
- If you need to use a picture saved in another format, use a graphics conversion program, such as Adobe Photoshop, Apple QuickTime Pro, or Lemke Software's Graphic Converter, to convert it to a common graphics file format.

Sharing information with non-Office users

Word

- ▶ To save Word documents in other formats for use in different programs, click **File > Save As**. Select a format on the **Format** pop-up menu.

You'll probably want to choose one of the following:

- **Text Only** Saves text without formatting. Converts all section breaks, page breaks, and new line characters to paragraph marks. Uses the ANSI character set. Select this format only if the destination program cannot read any of the other available file formats.
- **Rich Text Format (RTF)** Saves all formatting. Converts formatting to instructions that other programs, including compatible Microsoft programs, can read and interpret.
- **Web Page (HTML)** Saves and opens documents in HTML format. Supports all versions up to HTML 3.x, some Internet Explorer and Netscape Navigator extensions, and CSS 1.0.

Word is capable of opening documents created in many other programs.

- ▶ To convert most types of documents saved in another format to Word, just open the document in Word.

When Word recognizes the file format, it converts the document and opens it. If Word cannot open the document you want, first open the document in the source program, and then save the document in a file format that Word can open. After the source document is converted, you can open it directly in Word.

Excel

- ▶ To save Excel documents in other formats for use in different programs, click **File > Save As**. Select a format on the **Format** pop-up menu.

Note The SYLK (Symbolic Link) format saves the text, values, and formulas as they are displayed on the active worksheet but has limited cell formatting. If an Excel function is not supported in SYLK format, Excel calculates the function before saving the document and replaces the formula with the resulting value.

- ▶ To import a text file into Excel, click **Data > Get External Data > Import Text File**. Select the file you want to import, and then click **Get Data** to start the Text Import Wizard.

new

Extensible Markup Language (XML)

XML allows you to share data between different programs. In Office 2004, Excel can read and write files in XML format. You therefore have the following options in Excel 2004:

- Open and save a standard XML file created in Excel 2003 for Windows.
- Exchange data with any file that conforms to the Excel XML schema.

Tips

- When you save an Excel file in XML format, some components, such as charts and macros, are lost.
- XML is an uncompressed format, so the files will be significantly larger than Excel files.

Entourage

You can import information created in other programs, including contacts, Calendar events, notes, tasks, messages, rules, signatures, and account information. You can also import national and religious holidays to the Calendar.

- To import information into Entourage, click **File > Import**, and then follow the instructions in the Import Assistant.

You can also import and export contact lists as text files, send and receive individual contact information as vCards, and import and export messages saved as an MBOX-format text file. For more information, see “[Import e-mail and PIM information](#)” on page 83.

You can import PST files created in Outlook 2001 for Mac into Entourage by using the PST Import Tool. You can download the free PST Import Tool from the Download center at <http://www.microsoft.com/mac/download/>. System requirements and installation instructions are included on the Web site.

Multilanguage support

Office 2004 is available in English, French, Japanese, German, Spanish, Swedish, and Italian. In addition, Office 2004 displays, prints, and accepts the input of characters from a wide range of languages, including Greek, Russian, Czech, Japanese, Korean, and Chinese. To use these languages, you must select the appropriate keyboard layout. Click **Apple > System Preferences**. Under **Personal**, click **International**. On the **Input Menu** tab, click a language.

If you work with Word and PowerPoint documents that contain text in more than one language (for example, in a multinational organization) or if you share documents with people who use Office on systems that run in other languages, you can identify the segments of text written in another language.

Proofing tools provide spelling and grammar checkers, a thesaurus, hyphenation, and AutoCorrect features you can use to create and edit documents in different European languages when using Office programs. See Help for installation instructions and for a list of languages for which proofing tools are available in Office 2004.

- In Word and PowerPoint, to mark a section of text that's in a language other than your default language, first select the text. Click **Tools > Language**, and then select the language you want from the list.

If you installed proofing tools for the selected language, the spelling for that language will be checked. In Word, some proofing tools also check grammar. If you haven't installed proofing tools, Office will not check the selected text for spelling and grammar.

The Microsoft Language Register is a utility that you can use to enter Japanese text in documents created in another language. The Language Register contains special Japanese search, text editing, and document grid features. See Help for installation instructions.

- To enable the East Asian language features for an Office program, drag the program icon to the Microsoft Language Register, and then select the language from the pop-up menu.

You'll see the additional features listed under the standard menus.

Tips

- **Date, time, and number style** The default styles for dates, times, and numbers are set on the tabs of the **International** dialog box under **Apple > System Preferences > Personal**. However, in an Office program, you can format these elements in the style you want for different languages. In Word and PowerPoint, click **Insert > Date and Time**, and then select a format. In Excel, click **Format > Cells**. On the **Number** tab, select the option you want.
- **Multilingual sorting rules** You can sort data in tables and lists in Word and Excel according to the rules of a range of languages. In Word, click **Table > Sort**. Click **Options**, and then select a sorting language. In Excel, text is sorted based on the rules of the localized language of the system if that language is any of the following: Danish, Dutch, Finnish, French, German, Italian, Norwegian, Spanish, or Swedish.
- **Web pages** When you use Word, Excel, or PowerPoint to create Web pages and intranet content, you can set the language encoding (the language and character set) so that pages are displayed correctly. To do so, click **Program > Preferences**, and then click **General**. Click **Web Options**, click the **Encoding** tab, and then select an option.

Sharing over the Internet

You can save Word documents, Excel worksheets or workbooks, PowerPoint presentations, and Entourage calendars as Web pages.

- ▶ To save a document as a Web page, click **File > Save as Web Page**.

Office displays the page as it will appear in a Web browser by converting the content and formatting to HTML. Formatting and other items that aren't supported by HTML are converted to the closest feature in HTML.

Office creates an HTML file and saves it on your computer, along with a folder, if required, that contains all of the other HTML files and graphics needed to display all of the information. You can then post the files on a Web site or attach them to a message.

- ▶ To view a Web presentation in a browser, open the main *filename.htm* file. If you move your Web presentation to another location, be sure to move the main file and the companion folder together.

Notes

- **Excel** You can save an individual worksheet as a single file or a workbook as multiple files in the same folder. When you publish a chart, the chart is saved as a Portable Network Graphics (PNG) image file in the supporting files folder.
- **Entourage** When you save your Calendar as a Web page, indicate the beginning and ending dates you want to include.

Protecting data

Sharing information with other users — whether on your corporate network, through e-mail, or on the Web — raises a security concern. Office 2004 offers features to protect your information.

Password protection

You can attach two types of passwords to your Word and Excel documents — one required to open the document and another required to modify it. When you send the document to colleagues, they'll need to know the passwords to open or change the document.

- ▶ To assign a password to a document, click **File > Save As**. Click **Options**, and then enter the passwords you want to use. In Word, you'll need to click **Security** before entering the passwords.

In Excel, you can protect elements from accidental change even if you don't want to attach a password to the entire document.

- ▶ You can protect Excel documents in any of the following ways:
 - To protect the content, objects, and/or scenarios on the active worksheet, click **Tools > Protection > Protect Sheet**, and then select your options. Note that you can unlock specific cells in a protected sheet if, for example, you want to lock a form but allow others to enter information in it.
 - To protect the structure and/or window position and size of a workbook, click **Tools > Protection > Protect Workbook**, and then select your options.
 - To share a workbook and make sure no one removes the change history, click **Tools > Protection > Protect and Share Workbook**, and then make your selections.

In Word, you can do the following:

- Remove personal information, such as the name attached to review comments. Click **File > Save As**, and then click **Options**. Under **Security**, select privacy options.
- Protect tracked changes, comments, or forms by requiring a password for these items in the document. Click **Tools > Protect Document**, and then select an option.

Internet security

If you are using Entourage, you can take advantage of security features, such as digital signatures and encryption, that allow you to send and receive secure e-mail messages and prevent unauthorized access to your computer. For more information, see "[Set up account security](#)" on page 84.



Managing Project Information

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This chapter shows how you can manage project information and use the Office programs as a suite to accomplish a task. It features the Project Center, new to Office 2004, which you can use to manage an entire collection of information and communications around a single project — in this example, organizing a sales seminar. The seminar is organized by you and another colleague on the same computer network. You use the Project Center and the programs in Office to perform the following tasks:

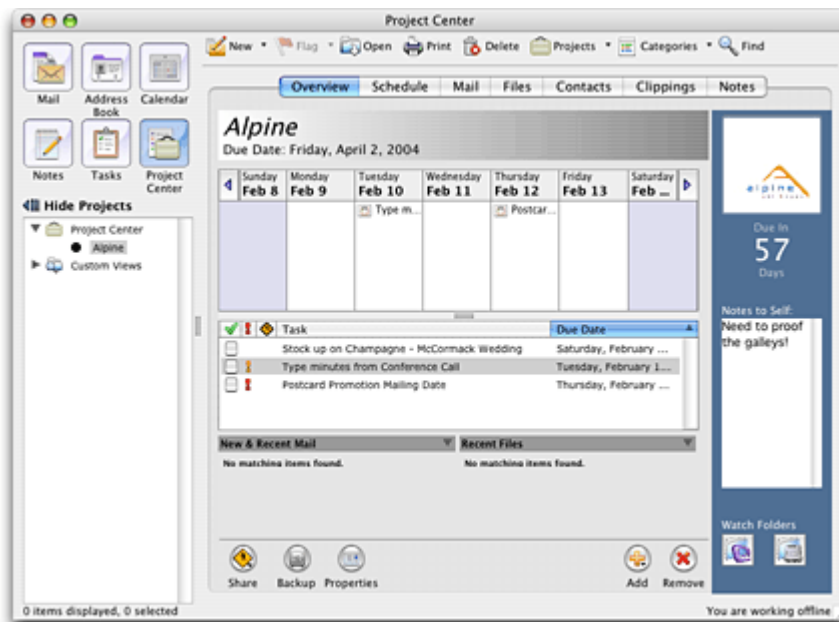
- Set up the Sales Seminar project in the Project Center.
- Add contact information for potential attendees to the Office Address Book.
- Write the invitation in Microsoft Word, using the Data Merge Manager feature to address the form letter.
- Create a Microsoft Excel workbook to track payments and costs.
- Create Microsoft PowerPoint presentations for the seminar.
- Exchange e-mail messages, create to-do lists, and set up schedules in Microsoft Entourage.
- Archive the project.

new Project Center

Use the Project Center to organize and display all types of information related to a specific project, including e-mail messages, contacts, notes, and files. You can even include non-Office files and clippings stored in your Scrapbook.

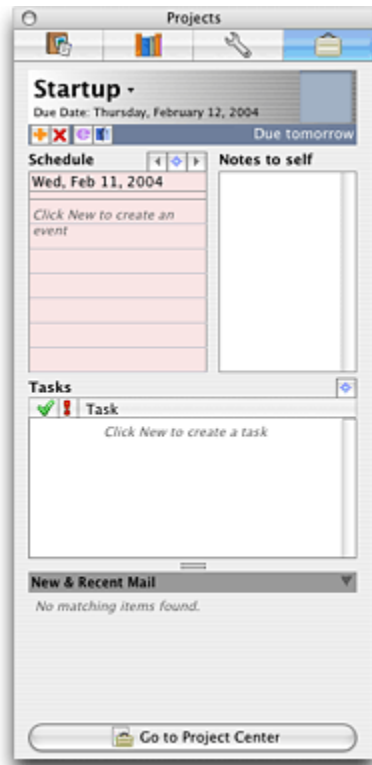
The Project Center in Entourage is the primary view into project information.

- ▶ To view the Project Center, in Entourage, click **Project Center**  in the navigation pane. The Project Center window displays a list of the projects you have created. Click the project you want to view. The different types of information for that project are organized by tab.



When you're working in Word, Excel, and PowerPoint, the **Project Palette** provides a quick view into your project data.

- ▶ To view the **Project Palette**, in Word, Excel, or PowerPoint, click **Tools > Project Palette**.



When you create a project, Project Watch Folders are created in the following locations:


- In the Finder on your computer or on a file server. You can use this folder to store project files and aliases (shortcuts) to project files stored elsewhere on your computer.
- In the e-mail window in Entourage. A project folder for related e-mail messages appears in your folder list.

You can share a project so that others can view and manage the project information.

Set up a project in the Project Center

Although you can view and add project information from Word, Excel, and PowerPoint, you create new projects in Entourage.

To create a new project:


1. In Entourage, click **Project Center** , and then click **New**.
2. In Step 1 of the New Project Wizard, name the project — Sales Seminar, for example — and specify a due date. You can set the project due date as the first day of the seminar. If you want, you can associate a picture and a color with the project to make items more quickly identifiable.
3. In Step 2, indicate whether you want to have Project Watch Folders created automatically on your hard drive and in Entourage to store your project information or you want to create them yourself. Also indicate whether you want to add items from an existing category or project.
4. In Step 3, set up rules that will automatically add new and related e-mail message to the project. You can enter up to three words that Entourage uses to identify messages related to the project. When an e-mail message arrives that contains one or more of these words in the subject line, it is automatically classified as part of the new project and is stored in the project folder. Messages that are associated with the project also appear on the **Mail** tab in the Project Center window. You can specify whether you want to place an alias (shortcut) to the Project Watch Folder on your desktop. The folder itself is located in Documents/Office Projects on your hard disk.
5. Step 4 summarizes what you've done and tells you how to proceed.

Share a project

In this example, you share the Sales Seminar project with your colleague so that you both have access to the seminar information (excluding e-mail messages and clips). Projects are shared on a file server to which all project subscribers have access. The project creator shares a project with others.

- ▶ To invite someone to subscribe to a project, in the Project Center window in Entourage, click the **Share** button, and then click **Start Sharing Project**. In the Project Sharing Assistant, indicate where you want to store the shared project data, what you want to share, and whether you want project items to be added automatically to the shared folder or whether you want to add them yourself.

An e-mail invitation is created for you to send to each person you want to invite to share the project. Recipients who subscribe to a project have read/write access to all of the shared items in the project.

When a project is shared, Entourage moves project items from their original locations to the shared location. This differs from unshared projects, where only aliases for the project items are automatically placed in project folders. A **Shared** icon  identifies items as shared.




Set up the Address Book


In the Address Book in Entourage, enter contact information for the people you intend to invite to the seminar. You can use this contact information to create and track correspondence and other relevant information.

First create a category, such as Salesforce, so that you can quickly select the contacts to whom you want to send the seminar invitation.

1. On the **Edit** menu, point to **Categories**, and then click **Edit Categories**.
2. Click **Add Category**, type **Salesforce** to name the category, and then press RETURN.
3. To change the color for the category, click the arrow next to the current color, and then click the color you want.
4. When you're finished, close the **Categories** dialog box.

Then enter the contacts and assign them to the category and the project.

1. In Entourage, click **Address Book** .
2. In the Address Book, click **New**, and then complete the remaining steps for each contact you want to add.
3. Enter the information you want to record. Be sure to add the address information in a format that can be used in a data merge. For more information, see "data merge" in Help.
4. Click **Categories**  to add the contact to the **Salesforce** category.
5. Click **Projects**  to add the contact to the Sales Seminar project.
6. Click **Save & Close**.



Tip To assign a contact that is already in your Address Book to a category, click the contact in the Address Book list, click **Categories** , and then select the category name. To assign multiple contacts at the same time, click the first contact and hold down **⌘** as you click the remaining ones.

Create the invitation

To personalize the invitation letter without typing the name and address for each letter you send, use the Data Merge Manager in Word. First create the letter, then identify the data source for the contact information (the Address Book), and then merge the data fields into the letter before printing.

Write the letter

When you installed Office, you installed Word templates, including several letterhead designs. Use one of these designs to effortlessly create professional-looking invitations.

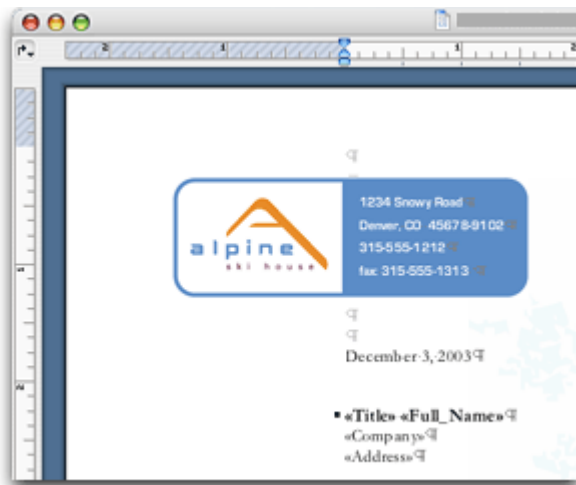
1. In Word, click **File > Project Gallery**.
2. Under **Groups**, click the **Business Forms** triangle, and then click **Letterheads**. Click the design you want.
3. Type the body of the letter, and apply any formatting options.
4. Click **Save** .
5. In the **Save As** dialog box, type the document name, for example, Sales Seminar Invitation.
6. Click **Tools > Project Palette**. In the **Projects** window, click the current project you want to add, click **Add current file** , and then click **OK**. An alias for the file is placed in the Project Watch Folder and appears on the **Files** tab in the Project Center window in Entourage.


Leave the letter open to insert data merge fields to create the form letter.



Identify the data source

Set up the data merge to automatically insert a recipient's name and return address in each copy of the letter.

1. Click **Tools > Data Merge Manager**.
2. Under **Main Document**, click **Create**, and then click **Form Letters**.
The letter becomes the main document for the data merge.
3. Under **Data Source**, click **Get Data**, and then click **Office Address Book**.
4. Under **Merge Field**, drag the field names to where you want them in the document. For example, drag the **Title** and **Full_Name** fields to the first line of the return address.



5. Click **Save**  to save the changes you made to your form letter.

Tip To preview how your letter will look with the merged data, click **View Merged Data**  under **Preview** in the Data Merge Manager. Click **View Merged Data**  again to return to your document and make any adjustments you want.


Merge contact data into the form letter

Now that you have created the invitation letter and identified the data source (the Address Book), it's time to merge the name and address data from the Salesforce category in the Address Book to create multiple copies of the letter, one for each person you want to invite to the seminar.

1. In the Data Merge Manager, under **Merge**, click **Query Options**.
2. On the **List mail merge recipients by** pop-up menu, click **Categories**.
All categories are selected by default.
3. Clear the check box next to all categories except the one you want — for example, **Salesforce** — and then click **OK**.

4. Click **Merge to New Document** .

A new document is created containing a letter for each contact in the Salesforce category. Word automatically inserts a page break between the letters.

5. Click **Save** .
6. Name the new document, select a location for it, and then click **Save**.
7. On the **File** menu, click **Print**.

Tip For information about creating envelopes or mailing labels by using the Data Merge Manager, search for “print an envelope” and “mailing labels” in Help.


Track payments and costs in Excel

Track attendance numbers, payments, and seminar costs in an Excel worksheet.


- ▶ In Excel, click **File > New Workbook** to create a new workbook. In the top row, label the columns of information you want to track. In the first column, add the names of those you invited.

	A	B	C	D	E	F	G	H	I	J
1	Name	Y	N	Flight #	Arr date	Arr time	Dep date	Dep time	Hotel	Notes
2										
3										

Tips

- Use the List Manager to enter the data in the worksheet. Click **Insert > List** to display the List Wizard. Include conditional formatting to highlight attendees who have not paid. For more information, search for “conditional formatting” in Help.
- Quickly insert totals using AutoSum. Click a cell below a column, such as the Payment column, and then click **AutoSum**  to insert the total in the cell.
- Click the AutoFilter arrows and select an option to hide rows in the list. For example, hide the rows for those who have decided not to attend. If you’ve filtered the list, the totals will reflect only the entries displayed.
- Track seminar expenses on a separate worksheet of the same workbook. Double-click the worksheet tab at the bottom of the workbook to change worksheet names from Sheet1, Sheet2, and so on, to more meaningful names.

Save the file, then add it to the project so that both you and your colleague can record payments and expenses as they occur.

- ▶ In the file, click **Tools > Project Palette**. In the **Projects** window, click the current project you want to add, click **Add current file** , and then click **OK**. An alias for the file is placed in the Project Watch Folder and appears on the **Files** tab in the Project Center window in Entourage.

To share a file to a project, the file must be added to the Project Center in Entourage and not to the **Project Palette** in Word, Excel, or PowerPoint. After a file is added to a shared project, everyone who subscribes to the project can open the file from the Watch Folder, from the **Files** tab of the Project Center, or from the **Project Palette**.


Tip Add non-Office files into a Project Watch Folder, either into the folder alias on your desktop or into the folder itself in the Office Projects folder.

Create presentations in PowerPoint

Convey information during the seminar by using PowerPoint presentations. Check out the designs, animations, and slide transitions new in PowerPoint 2004. Insert sounds and movies to keep participants interested.

- ▶ To create a PowerPoint presentation based on a template design, click **File > Project Gallery**. Under **Groups**, click the **Presentations** triangle, and then click **Design**. Click the design you want.

Save your presentation, and then add it to the project so that you won't have to look for it during the seminar.

- ▶ In the presentation file, click **Tools > Project Palette**. In the **Projects** window, click the current project you want to add, click **Add current file** , and then click **OK**. An alias for the file is placed in the Project Watch Folder and appears on the **Files** tab in the Project Center window in Entourage.

Tip During the seminar, you might want use your digital camera to take photos of the event highlights. During the breaks, upload the photos to your Macintosh. In PowerPoint, add the photos to the Office Scrapbook, as described in “[Sharing Office information](#)” on page 118. From there, it's a quick step to insert the photos into the final PowerPoint presentation.

Track project information in the Project Center

Throughout the course of organizing the seminar, you'll generate e-mail correspondence, miscellaneous notes, to-do items, and Calendar events relating to the project. The Project Center provides a view into the project information stored in Entourage. When you click a project name in the Project Center window, you'll see the items that have been added to the project, organized on tabs according to information type. The **Overview** tab shows a week of Calendar events and tasks so that you can stay on top of project deadlines.

On any tab of the Project Center, you can do the following:

- Double-click an item in the list to open the item.
- Click **New** to create a new item and add it to the project.
- Click **Add** to add an existing item to the project.
- Click **Share** to share the item with others who are subscribed to the project.
- Click **Remove** to remove the item from the project. This does not remove the item from its original location.

You don't have to be in the Project Center to add items to the project. For example, you can add e-mail messages to a project in the following ways:

- In your Inbox, select a message in the list or open a message and assign it to the project by clicking **Projects** at the top of the window and selecting the project name from the list.
- Drag messages from your Inbox to the project folder in the folder list.
- Automatically add messages to the project based on the rules you set up when you created the project.

You can add other Entourage items, such as tasks and Calendar events, in the following ways:

- In any Entourage window, select an item, click **Projects**, and then select the project from the list.
- In the Project Center, click the project name in the list. Click **Add**, click the type of item you want to add, and then locate the item to be added to the project.

After an item is added to a project, an icon ● in the color identified with the project is displayed with the item in any list view in Entourage.

Archive the project

The seminar is over, and it's time to move on. After a project is complete, you can export all project-related information for safekeeping to a special file package stored in the location you specify.

- ▶ To export a project, in Entourage, click **File > Export**, and then click **Export items to an Entourage archive**. Click **Items that are in the project**, and then select the project from the list. Click the items you want to export.

You can choose to make a copy of the content but leave the original intact (backup) or delete the original files (archive). You can import a project at a later date by using the **Import** command.

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