Windows 7 and Microsoft Office 2010 Quick Start Guide

Below are the recommended first steps to take in becoming familiar with your new Windows 7 PC and Microsoft Office 2010. You will find the transition to be much easier if you take a few minutes to do the steps outlined here.

This is designed to be a quick start guide, but it does address some of the most common questions related to the conversion. As you become familiar with your new products, we are hopeful that this guide will continue to be a benefit to you.

In order to use this guide most efficiently, you may want to expand the bookmarks. Doing so allows you to find the desired topic and click on it in order to go directly to it.

As you become familiar, you will likely want to know more about the Windows 7 and Office 2010 new and enhanced features that are not discussed here. Links to more detailed documentation and detailed Microsoft online training are being provided here and/or on the Training website. These will further explore those features, which we believe greatly improve efficiencies for most.
Windows 7 Desktop
(Est. Completion Time: 5 Minutes)

1. **Desktop Wallpaper** — It is important to know that your Windows 7 desktop is setup with Microsoft Wallpaper (Aero Themes) designed to support new functionality in Windows 7. Changing your wallpaper could deactivate some of the new tools. For more information, see below.

2. Set up your **Windows 7 Taskbar** and familiarize yourself with the new look and functionality.
   a. The old **Quick Launch** functionality in Windows XP is now called **“Pinning”** and offers more functionality. To add applications to the Taskbar:
      i. **From Desktop:** Drag and Drop or Right-click on the desktop shortcut and select “Pin to Taskbar”.
      ii. **From Start Menu:** Locate desired application. Right-click on the application and select “Pin to Taskbar”.
   b. See comparison of Windows XP and Windows 7 taskbars, with notes on new functionality.

**Windows XP Taskbar:**
- One-click Quick Launch
- Open Applications w/ two open spreadsheets
- Show Desktop

**Windows 7 Taskbar:**
**Characteristics:**
- One-click Pinned Apps & Shadowed Open Apps
- Show Desktop (Can hover if you do not need to minimize all windows.)

**Default Setup:**
Your taskbar will be set up with Windows Explorer, Outlook, Excel, Word, Internet Explorer, Mocha, and Windows Media. Open applications will have a “shadow box” around them.

**Enhancement – Open Files:**
With multiple windows open, the icon will be tiled instead of duplicated, saving taskbar space.
3. **Internet Explorer 8** - There is no change to the Internet Explorer version on your new Windows 7 desktop. However, the default settings may be slightly different from those you had. As a reminder, toolbars can be set as follows:

- **Right-click here to select or de-select toolbars.**

**Step 1:** Hover cursor over application icon to get a “Peek” at all open files for that application.

**Step 2:** Hover over each of the open windows to get a preview w/o having to select it. As you hover over each, they will be displayed as shown here.

**Step 3:** Once you find the one you want to activate. Then just click on this thumbnail view.
4. **Windows Explorer** - Windows Explorer has a slightly different look in Windows 7. Here are comparisons of the XP and Windows 7 versions.

**Window XP:**

![Windows Explorer window XP]

**Windows 7:**

![Windows Explorer window Windows 7]

As you can see here, the major difference is that you now have Libraries that house Documents, Music, Pictures, and Videos. “My Documents” is a folder under Documents. If you primarily use “My Documents”, it may be useful to create a shortcut in Favorites where it can be quickly accessed.

**To add shortcut to Favorites:**

1. Select folder you desire to add.
2. Right-click on Favorites.
3. Select “Add current location to Favorites.”

**Opening Network Folders:** If you know the name and location of a network folder, you can enter that information in the Input bar. Just right-click and enter in the following format (without the quotes): "\Main_Office\Public"

Note that you can add Network servers and/or folders to Favorites, too.
5. **Changing Your Password** - The process for changing your password has not changed, but you may find the following tips helpful.
   a. It is easier to keep up with your PC / Network and mainframe passwords if you keep them in sync. When you change one, change the other to the same thing. It could save you time later.
   b. Keep your password private. It assures the security on your desktop.
   c. CTRL+ALT+DEL will give you the option to change your PC / Network password. Just select “Change a password...” and follow the on-screen prompts. *(NOTE: If you are going to sync with your mainframe password, limit the characters in your Network password to 8. Although the Network will accept more characters, the mainframe will not.)*
   d. Open Mocha and change password accordingly, entering your Network password as your “New Password”.

6. **For more information** on new and enhanced Window 7 desktop features, you may be interested in the more in-depth *Detailed Guide to Windows 7*, which include information on the following items.
   a. How to view the *Getting Started with Windows 7* video.
   b. The possible impact of changing your desktop wallpaper.
   c. How to set up and work with the new functionality in Windows Explorer.
   d. How to reset your Internet Explorer home page.

7. Other links of interest:
   a. Windows 7 *Keyboard Hotkeys*
   b. For more information, see the various options on the training website under **Features in Windows 7**.
Microsoft Office 2010 – Common Features
(Est. Completion Time – 6 Minutes)

You may not necessarily need to change anything during this step, but it is to your advantage to check each of these out. It will help you to become familiar with the new look for Office 2010 and will likely provide you with information you will need to know when you start using the products.

1. **Microsoft Office Backstage** – This refers to the tab labeled File on each of your Microsoft Office products. This is basically where you will manage your files, as it primarily contains most components from the Office 2003 File and Tools menu options. It would be to your advantage to take a few minutes to become familiar with this screen for each application.

**Microsoft Office 2003:**

With the exception of Web Page Preview (see View), the File functions are found in Microsoft Office Backstage.

Most of the Tools functionality is located in Options in Microsoft Office Backstage, as well.

Most of the Help menu functionality is also located in Backstage.

Excel and Outlook are similarly arranged.
Microsoft Office 2010 Backstage:

As you can see in the comparison below, Office Backstage is very similar for all applications, but particularly in Word and Excel.

**Info:** Includes Permissions (protecting your document) and Prepare for Sharing.

**Options:** Set parameters for your interface, display, and auto-save. Customize your Ribbons and your Quick Access Toolbar.

**Recent:** View most recently opened workbooks (see below).

**Print:** Print Preview is located in Backstage (see below) as well as other Print functions.

**Options (Excel & Word):** Set parameters for your interface, display, and auto-save. Customize your Ribbons and your Quick Access Toolbar.

**Differences, due to application differences:**

**Options (Excel):** Set parameters for your formulas.

**Options (Word):** Set parameters for proofing.

**Options (Outlook):** Create signatures or set desktop alerts. Customize your Ribbons or your Quick Access Toolbar.
**Print Preview:** Now it is all on one page in the Backstage.

**Note:** To print only a portion of a page (One time selection only. Does not save the range when you leave the document):

**Word**

1. Highlight the desired portion.
2. And choose “Print Selection” under Settings.

**OR**

1. Select Print Custom Range and enter the range in Pages.
Excel

For a one time setting, you can set as noted above for Word.

To set and keep for the next time you open the file:

2. **Ribbons** – Ribbons and Backstage replace the functionality of your Office 2003 Toolbar selections, including Menu Bar. While the ribbons will vary slightly because each application has different functionality, you will see a lot of common elements, as well. These are noted below.

**Office 2003:**

Comparing 2003 menu selections to the 2010 ribbon selections, you see some duplication in names, such as Insert and View.

The frequently used functions found in Edit and Format are primarily found on the Home ribbon, with some on the Page Layout ribbon.

Insert & Table functions can be found on the Insert Ribbon.

Windows functions are now located in the View ribbon.

**Office 2010:**

File (Backstage) & Home Tabs

Ribbon tabs, based on functionality

Quick Access Toolbar: Just as you had your favorite icons on your 2003 toolbar, they can be added to your Quick Access Toolbar.

First: Select desired print area.

Then: On the Page Layout ribbon, select the Print Area dropdown and select Set Print Area.
As noted above, the File (Backstage) option contains what you need to manage your file.

**Tip:** Spell Check is located on the Review ribbon, along with other tools you may use while reviewing your document before sharing it with others. If you frequently use Spell Check, you may want to consider adding it to your **Quick Access Toolbar**, using the process described below.

**Finally,** your ribbon option icons may vary slightly from one monitor to another, based on screen size. For smaller screens, or reduced screen size, Office 2010 will automatically reduce the size of the option icon so all ribbon options are visible. For example:

3. **Quick Access Toolbar** - As you review each application’s ribbons, you may find a frequently used function located on a ribbon other than Home. If it is truly frequently used, you may want to consider adding it to the Quick Access Toolbar.

   - **Quick Access Toolbar**
   - Right-click on the desired icon and select *Add to Quick Access Toolbar*
   - Another option is to choose items from the Quick Access Toolbar dropdown box, noted above.
4. **Finding Recent Files & Folders** - Office 2010 offers the same (or more) options for finding files and folders, using “Recent” or “Open” functionality. Below is a comparison of 2003 and 2010.

**Office 2003:**

- Recent
  - When you select File, you see the 4 most recently opened files related to that app.

**Office 2010:**

- Recent
  - Selecting Recent in Backstage (File) will show you 25 of your most recently opened files and folders.
  - Any file that you want to always be available at the top of the list can be “Pinned” to the list.
  - A single click here will Pin it.
  - Note: This works for Recent Places, too.

- Open
  - If you select File and Open, it opens My Documents where you can select a folder.
  - (Note: If you do the dropdown for Filename, it is empty.)
  - Or you can select My Recent Documents and it will display up to 33 files and folders where files have been opened.
Office 2010:

Both Recent and Open functionalities can be added to your Quick Access Toolbar.

5. **Key Tips** – Microsoft Office 2010 has added functionality for using keyboard shortcuts. Many of the keyboard shortcuts are still the same as in Office 2003, but they are now easier to see and use.

Windows XP:

In XP, you had to select ALT + “the underlined letter”.

Windows 7:

Press ALT to display the available shortcut keys. Once displayed, simply type the letter to initiate the action. If it takes you to another selection set, the shortcut keys will continue to be displayed until you have reached a logical stopping point. For example, selecting “F” for File will take you to the File menu, with shortcut keys displayed for that menu as shown to the right. **Note:** You only have to press ALT that one, original time.
Microsoft Outlook 2010  
(Est. Completion Time – 4 Min)

You may not necessarily need to change anything during this step, but it is to your advantage to check each of these out. You will need to know about them when you start using the products.

1. If you are a heavy user of Outlook, take a few minutes to review the ribbons and locate your most frequently used functions. If they are not on your Home ribbon or the Quick Access Toolbar, you may want to consider adding them. Note: This toolbar is slightly different, if you are sending mail.

2. You will find that other than the look of Outlook 2010, functionality is basically the same as in Outlook 2003, with a few nice enhancements.

3. For more information on new and enhanced Outlook 2010 features, you may be interested in the more in-depth Detailed Guide to Outlook 2010 guidelines, which include information on the following items:
   a. How to view the Getting Started with Outlook 2010 video.
   b. How to change your views in Mail and Calendar.
   c. How to add Shared or Other Calendars.

4. Other links of interest:
   a. In-depth, online Outlook 2010 Training
   b. The Outlook 2010 Quick Reference Card

Microsoft Excel 2010  
(Est. Completion Time – 8 Min)

As with Outlook, you may not necessarily need to change anything during this step, but it is to your advantage to check each of these out. It is information you will need when you start using the products.

1. If you are a heavy user of Excel, take a few minutes to review the ribbons and locate your most frequently used functions. If they are not on your Home ribbon or the Quick Access Toolbar, you may want to consider adding them.

2. You will find that other than the look of Excel 2010, functionality is basically the same as in Excel 2003.
3. **Key Considerations with Excel Workbook (*.xlsx)** — Because of compatibility issues between Excel 2003 and Excel 2010, there are a few things you should consider as you use your new product.

a. When you open one of your existing Excel workbook, it will be opened in **Compatibility Mode** since it was last saved as file type Excel 97-2003 Workbook (*.xls). Unless you change the file type, it will continue to be saved as file type (*.xls). This basically means you will not be taking full advantage of the enhanced functionality in Excel 2010.

b. **Things to consider before** you convert:
   i. Is your workbook shared with others? If so, do they have Excel 2010? If not, be aware that if you convert the workbook, they will only be able to view it in Compatibility Mode, so may not see exactly the same thing that you see. (They may even lose data.)
   ii. Once you convert, your old 2003 version will disappear. If it is a complex workbook, you may want to save a copy of it elsewhere before doing the conversion process. **Important:** If you do this, be sure to remove the old version, once you have verified the new version. Otherwise, you could end up updating the wrong version at a future date.

c. **To convert to Excel 2010 (*.xlsx):**

   When you click Convert, you receive this prompt:

   ![Read this disclaimer, determine if you need to save a backup for comparison, then select Convert.]

   **Note:** You will only see the Convert option in Backstage Info when viewing a worksheet saved in Compatibility Mode.
4. **For more information** on new and enhanced Excel 2010 features, you may be interested in the more in-depth *Detailed Guide to Excel 2010*, which includes information on the following items.
   a. How to view the *Getting Started with Excel 2010* video.
   b. How to use the Formulas ribbon.

5. Other links of interest:
   a. In-depth, online [Excel 2010 Training](#)
   b. The [Excel 2010 Quick Reference Card](#)

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**Microsoft Word 2010**

(Est. Completion Time – 4 Min)

As with Outlook and Excel, it is **to your advantage** to check each of these out. You will need to know about them when you start using the products.

1. If you are a heavy user of Word, take a few minutes to review the ribbons and locate your most frequently used functions. If they are not on your Home ribbon or the Quick Access Toolbar, you may want to consider adding them.

    ![The default Quick Access Toolbar will include: Save, Undo, Redo, Print Preview, and Open.](#)

2. Other than the look of Word 2010, functionality is **basically** the same as in Word 2003.

3. **Key Considerations with Word Document (*.docx)** – As noted with Excel above, consider the impact of converting shared documents. Some Word 2010 functionality could be lost if opened in Word 2003.

   a. To convert to Word 2010 (*.docx):

      ![Read this disclaimer; determine if you need to save a backup for comparison, then select Convert.](#)
When you click Convert, you receive this prompt:

![Microsoft Word conversion prompt](image)

**Note:** Convert option is available only when viewing a worksheet saved in Compatibility Mode.

4. **For more information** on new and enhanced Word 2010 features, you may be interested in the more in-depth *Detailed Guide to Word 2010*, which includes information on the following items.
   a. How to view the *Getting Started with Word 2010* video.
   b. How to set Options for Word.

5. Other links of interest:
   a. In-depth, online *Word 2010 Training*
   b. The *Word 2010 Quick Reference Card*