

Microsoft Office Productivity

Refer to documents on the spot by embedding them in your spreadsheet

Information Systems Protection

Supercharge your browser security plan with Vista's protection enhancements

Business Skills

Open career doors when you transform systems administration into a service

From the Editor

Your Office documents often go hand in hand, so you might switch back and forth between applications often. Instead, we'll show you how to embed a Word document in your Excel spreadsheet for easy reference.

Microsoft Vista includes several new security enhancements, many of which involve web browsers. You'll learn how to take advantage of Protected Mode and Parental Controls to control your Internet security.

Finally, we'll help you bridge the gap between IT professional and customer service representative. Impress your supervisors by adding friendly and helpful service to your arsenal of IT knowledge and troubleshooting skills.

MICROSOFT OFFICE PRODUCTIVITY

Refer to documents on the spot by embedding them in your spreadsheet

There are times when you wish you could combine a Word document with Excel's data analysis capabilities. For instance, you might need to provide instructions for completing a worksheet or insert descriptive analysis of your workbook's data. Simple text boxes and comments can help you add snippets of text-based information to your worksheets, but they're not always the most efficient tools for the job.

If you find it easier to do your writing in Word, or if the information you want to add to your workbook is already stored and formatted in an existing Word document, here's a great way to get the best of both worlds. Excel's Insert | Object command enables you to embed a new or existing Word document in a worksheet, as shown in **Figure A**.

Embedded objects

An *embedded object* is a file that's stored within another file. Embedded objects are also known as OLE (Object Linking and Embedding) objects. An embedded object typically looks and acts like a picture; however, you can easily make changes to the embedded object using commands from its native program.

Embed a new Word document

When you need to include a block of text-based information in an Excel worksheet, a simple text box can usually meet your needs. However, when the information you want to include calls for advanced formatting, layout and printing capabilities, you'll find an embedded Word document is an effective solution.

Related Courses

- Excel 2000, 2002, 2003, 2007 & 2007 New Features
- 4002 Forecasting and Trend Analysis Using Microsoft Office Excel 2003
- 4003 Summarizing Microsoft Office Excel 2003 Data to Make Better Business Decisions

	A	B	C	D	E	F	G
1	Client ID	Company	Contact Last	Contact First	Email	Contact Phone	Years Served
2	809	Butterfly Landscaping, Inc.	Jones	Ethan	ejones@blandscaping.com	555-321-3634	3
3	993	Brown, Brown & Gray, LLC	Brown	Preston	preston.brown@bbg.com	555-321-6495	2
4	783	Apple Core Daycare	Percival	Katrina	kat123@mymail.com	555-369-6647	6
5	461	Richard's Shoe Repair	Truman	Richard	truman@likenew.com	555-369-0021	1
6	446	Tina's Diner	Williams	Tina	twilliams@goodfood.net	555-369-3000	9
7	872	Johnson Construction, Inc.	Johnson	Quincy	quincyj@construction.com	555-321-1559	4
8	204	Bernstein & Everett Law	Everett	Priscilla	priscillae@bandelaw.com	555-321-6483	8
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							
31							
32							
33							
34							

ABC Accounting

400 Main Street
Ayer, MA
33333-9090

March 17, 2008

7755 Elm Grove Rd
Ayer, MA 33333-9090

Dear Sir or Madam:

As a loyal customer, we appreciate your business and would like to offer you a special discount on your 2007 tax filing.

If you visit your local ABC Accounting office before April 13, 2008, we'll cut 20% off our normal rates for your small business tax preparation and filing. In addition, we offer same-day refunds and audit coverage.

We hope to see you soon.

Sincerely,

Martin McMahon
President, ABC Accounting

A The sample client letter in this worksheet is actually an embedded Word document.

To create an embedded Word document from scratch:

1. Select the cell in which you want to anchor the embedded document's top-left corner. (You can always move the embedded document later.)

The benefits of linking

Linking to a Word document, rather than simply embedding it, is an effective way to minimize your workbook's file size. When you link to a document, Excel is able to retrieve the document's information directly from its source instead of adding that information to your workbook. In addition, any changes you make to the source document also apply to the embedded text.

2. Choose Insert | Object from the menu bar. In the Object dialog box, click on the Create New tab.
3. Scroll through the Object Type list box and select the Microsoft Word Document option, as shown in **Figure B**. Then, click OK to add a new Word document object to your worksheet.
4. Add information to the embedded Word document as needed. (For further instructions, refer to the "Manipulate embedded documents" section.)

Embed an existing Word document

Often, you won't need to create your document from scratch. If it's already floating around somewhere on your

computer or in a network folder, there's no need to copy and paste its contents into Excel, or even into a new Microsoft Word Document object. Instead, you can embed a copy of the existing file directly into your worksheet.

To embed a Word document that's already complete:

1. Select the cell in which you want to anchor the embedded document's top-left corner. (You can always move the embedded document later.)
2. Choose Insert | Object from the menu bar. In the Object dialog box, click on the Create From File tab.
3. Click the Browse button. Using the Browse dialog box, locate and select the Word document you want to embed in your worksheet. Click Insert.
4. Select the Link To File check box if you want to make sure the contents of the embedded document always match the contents of the source document.
5. Click OK to embed the document.

Manipulate embedded documents

There are two ways you can edit an embedded Word document. You can edit the contents, or you can edit the document's size, position, and other formatting properties.

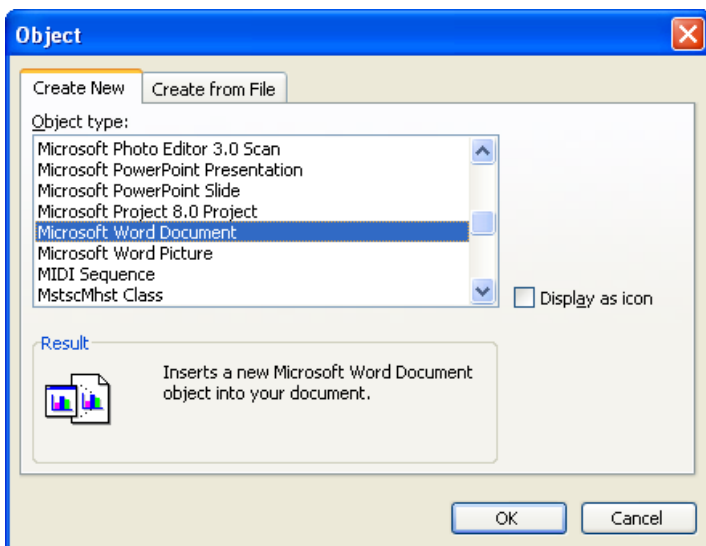
Change the document's contents

When you first embed an existing document, it looks like any other picture object. You might think that there's no way to edit the document, but when you double-click on it, the document changes into editing mode, as shown in **Figure C**. Embedded documents in editing mode look more like they would in Microsoft Word.

Whenever an embedded Word object is in *editing mode*, you can use Excel's commands to edit the document's contents, just as if you're working in Word. For instance, if you select a word in the document and click the Italic button on Excel's Formatting toolbar, the selected word is italicized.

However, clicking on any other part of your worksheet instantly restores the embedded document to *object mode*. Whether the document is in object mode or editing mode, you can move it or resize it. But if you want to format the document like you would a picture, AutoShape or text box, you have to use object mode.

Word toolbars: When your embedded document is in editing mode, you'll notice that Word's toolbars replace Excel's toolbars so you can easily access the Word features you're used to. When you return to object mode, Excel's toolbars return.



B

You can create a new Word document from scratch, or you can embed an existing one.

Adapt For Excel 2007

You can embed a Word document in an Excel 2007 document in much the same way you can in earlier versions. Just go to the Insert ribbon and select Object from the Text area. You'll see the same Object dialog box with two tabs: Create New and Create From File. When your embedded Word document is in editing mode, a Word ribbon appears in Excel 2007 so you can access all of Word's commands.

Go straight to the source

If you're working on a lengthy document, you may find it easier to make your changes right in Word. To open the document object in Word, use either of the following techniques:

1. Click on the embedded object to select it, and then choose Edit | Document Object | Open from the menu bar.
2. Right-click on the embedded object ([control]-click on the Mac), and then choose Document Object | Open from the resulting shortcut menu.

Now, you can make the desired changes to the embedded document with the comfort of Word's features. When you've finished editing the document, click anywhere in your worksheet to exit editing mode and return to object mode. (Or, if you've used the Open command to open a separate document window, simply close the window to return to your worksheet.) The changes you made to the embedded document are preserved.

Change the object's formatting properties

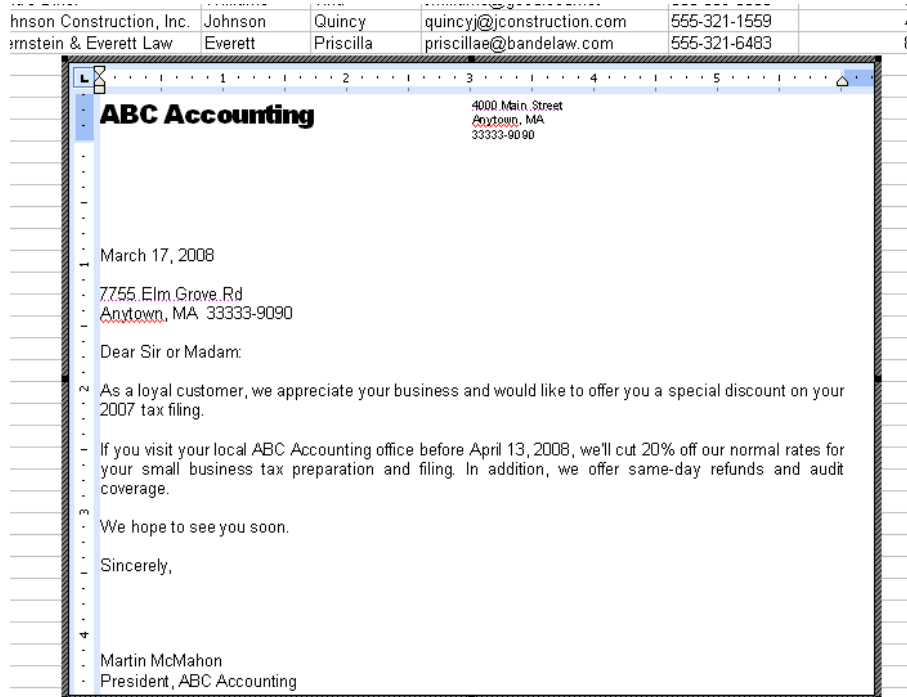
By default, an embedded Word document has a white fill color and a simple 0.75-point black border. However, you can easily dress up the default border and fill colors just as you would a picture object. Click once on the embedded document to select it while it's in object mode. Then, choose Format | Object from the menu bar. Click on the Colors And Lines tab and customize the

settings in the Fill and Line panels as desired. Click OK when you've finished.

Tip: To format an embedded object's appearance, try using the Picture toolbar instead of the Format Object dialog box. To display the Picture toolbar, right-click on the embedded object and choose Show Picture toolbar from the resulting shortcut menu.

You can fine-tune the embedded document's size by dragging any of its sizing handles. Just hold down the [Alt] key as you drag to snap the object's borders to cell edges.

To adjust the object's margins, choose Format | Object and click on the Picture tab. To increase the object's margins, simply decrease the Crop From settings. For instance, changing the Left and Top options to -0.1" applies a 0.1-inch margin between the edges of the embedded document's text area and its border. 🎯



C When an embedded Word document is in editing mode, Excel's toolbar buttons apply to the Word document instead.

Business skills for the new world of work

In business today, productivity is key to your success. Whether that means setting up projects for success, forecasting and analyzing trends, or managing critical business information, it is vital that you have the skills to work at peak performance. You already know how to use Microsoft® Office System applications. New Horizons offers Microsoft Business Skills Series Courses to teach you how to use those applications to more efficiently manage, work with, and prioritize information to make better decisions. Go to www.NewHorizons.com for information on courses that cover topics such as:

- 📍 4004 Managing Critical Business Information Using Microsoft Office Access 2003
- 📍 4007 Creating Effective Presentations Using Microsoft Office PowerPoint 2003
- 📍 4008 Building Better Microsoft Office Word 2003 Documents In Less Time

Supercharge your browser security plan with Vista's protection enhancements

Due to enhancements in the operating system's technology, Windows Vista offers two new security features to keep up with the demand for a safer web experience — Protected Mode and Parental Controls. We'll show you how to tweak these features to meet tough security challenges at home and in the office and take security into your own hands.

Rest easy with Protected Mode

Protected Mode in Vista's IE7 defends the system from attack by limiting malware's ability to access critical local files, such as the registry. To protect those files, the mode isolates IE from other applications running on the computer, thus limiting add-ons' (and thus malware's) movement to within the temporary internet file folders (e.g., cache, cookies, etc.).

Protected Mode uses the new User Interface Privilege Isolation (UIPI) technology. UIPI takes advantage of the Limited and Administrative tokens afforded by Vista's User Account Control and adds to it by operating IE at an extremely low privilege level. If malware does get in and piggybacks on an application that utilizes a user's Limited token, it cannot then access

processes running under a local administrator's Administrative token.

To enable Protected Mode:

1. Open Internet Explorer and choose Tools | Internet Options.
2. Select the Internet Options dialog box's Security tab.
3. Select the Enable Protected Mode check box for each Security Zone as shown in **Figure A**, and click Apply.

When a website resides in a Security Zone for which you enabled Protected Mode, IE7 indicates the mode is turned on for that site.

Restrict internet access with new controls

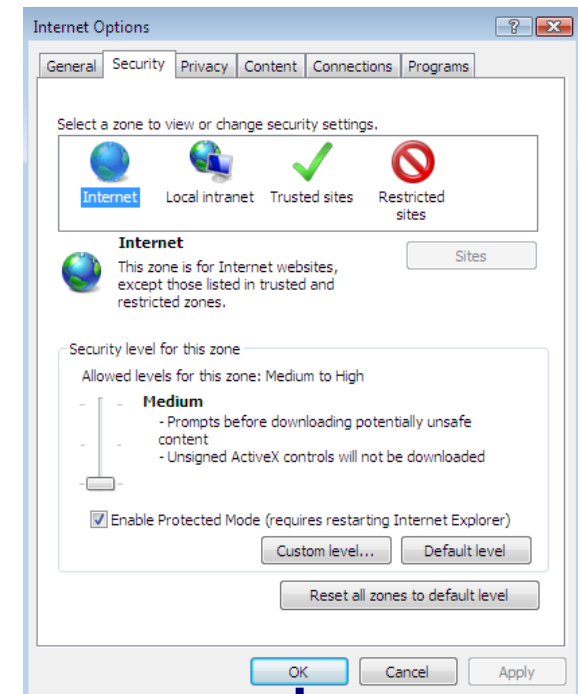
As any parent with a computer at home will tell you, protecting the

kids, the computer, and the home network is a full time concern. Vista Home and Ultimate come with Parental Controls that limit access to particular websites, prohibit downloading files, collect data about computer usage, and much more.

Bonus: While designed for protecting children, you can use Parental Controls to restrict internet access for any user.

Related Courses

- 5115 Installing and Configuring the Windows Vista™ Operating System
- 5117 Installing, Configuring, Troubleshooting, and Maintaining Windows Vista®
- Windows Vista - Level 1
- Windows Vista - Level 2



A

Enable Protected Mode for the various security zones you may surf.

Internet | Protected Mode: On

Parental Controls on a domain

If you want to use Parental Controls on a domain member Vista Ultimate computer, you need to enable the option with Group Policy. This might come in handy if you use a laptop for work — at home and in the office — but allow your kids to use it. To enable Parental Controls for the domain machine, use the Make Parental Controls Control Panel Visible On A Domain policy in the Local Computer Policy\Computer Configuration\Administrative Templates\Windows Components\Parental Controls node.

Edition note: The Parental Controls feature is *not* available in Business or Enterprise editions.

Reduce security costs for small business network

Let's say you support a network of thirty users and you're looking for inexpensive ways to control your systems. Rather than implement a time-intensive group policy plan or purchase desktop control software, consider the options available in Parental Controls.

With this new feature, you can keep users off of prohibited websites, eliminate their ability to play games on your systems, deny access to applications, and track their activity — all from the simple Control Panel interface.

Parental Controls — the basics

When a user logs in with his own Parental Control-enabled credentials, he's automatically blocked from accessing certain sites with Internet Explorer. When IE blocks a user, it displays a web page indicating why the page was blocked. The user can then email the administrator — you — for permission to access the site.

With Parental Controls you can also block all downloads to your computer so users don't risk your SOHO network's security. Later, you can even view a log of attempted downloads.

And, you can limit the times of day a user can access a computer, block certain programs for a user, or limit access to games, as shown in **Figure B**.

For a workgroup or standalone computer, you must first create the user accounts on the computer for which you want to apply the controls. For domain computers, you'll apply the settings to a domain user account.

Note: If you didn't create the user before opening up the Control Panel, you'll have the opportunity to create it later.

To configure the Controls:

1. Open Parental Controls by selecting Start | Control Panel | User Accounts And Family Safety | Set Up Parental Controls.

2. Select the user account for which you want to configure the controls, or create a new user.
3. Select the On option button for Parental Controls.
4. Select the On option button for Activity Reporting, if desired.
5. Click on the link for any Windows Setting you want to configure.

A Web Restrictions configuration window appears when you click on the Windows Vista Web Filter link. From here you can choose default settings or explicitly allow or deny specific sites. **Time saver:** Don't recreate your list for every computer and user on that computer — export your Web Allow Block List and import it during your next setup. 🌐

The screenshot shows the 'Set up how child1 will use the computer' window. It is divided into several sections:

- Parental Controls:** Radio buttons for 'On, enforce current settings' (selected) and 'Off'.
- Activity Reporting:** Radio buttons for 'On, collect information about computer usage' (selected) and 'Off'.
- Windows Settings:** A list of settings with icons:
 - Windows Vista Web Filter: Control allowed websites, downloads, and other use.
 - Time limits: Control when child1 uses the computer.
 - Games: Control games by rating, content, or title.
 - Allow and block specific programs: Allow and block any programs on your computer.
- Current Settings:** A summary box for 'child1' (Standard user, No Password) with a 'View activity reports' link.
- Summary Table:**

Web Restrictions:	Medium
Time Limits:	On
Game Ratings:	Off
Program Limits:	Off

B Configure internet usage options for any Windows user. You can also set time limits and block specific programs.



IT Professional eTips to Enhance Your Work

If you are an expert at what you do, then you want to sign up for FREE New Horizons IT Professional eTips. Each week you will receive expert advice from our experienced editors that will improve your productivity and enhance your work. Learn more about the applications you use every day, including: Microsoft Windows 2000, Microsoft Windows Server 2003, Oracle and SQL Server. Imagine the possibilities with the skills you'll gain!

BUSINESS SKILLS

Open career doors when you transform systems administration into a service

You work hard to set up user accounts and ensure that they have access to the right resources. You may be managing web services and have thousands of users to keep satisfied. Much of the time, all goes well between users and their accounts or web services. However, when users experience problems, slow downs, or work stoppages, you — the systems administrator — eventually get calls for help. Your success is often measured by how well you address those problems from beginning to end.

Systematically deliver customer service

Users seem to have one goal in mind when they call you — getting the service or the account back up and running. It seems like it should be simple: get the system fixed and the user back online. What's almost as important as your technical ability in solving the problem is the way that you address a customer when you get that call for help.

You may believe that your job is to determine, fix, and resolve the system-related problem. The mere fact that you assess and modify the operating environment (OE) or the applications running on it so the services or account are repaired is only half the solution. People want affirmation that you're addressing *their* problem, rather than just *the* problem.

For example, when a customer says, "There's a problem with the sys-

tem," what the user is really saying is, "I have a problem accessing something." There's a subtle difference, but to the person calling in with the complaint, the problem becomes something personal. What many systems administrators completely miss is the need to address a user's problem, first, and the technical problem, second.

Address the person's problem

Here's how a typical call can go:

"Hello?"

"Yes, I'd like to report a problem accessing the FTP site."

"Okay. What's your username?"

"It's XKJ274."

"All right. Check the site after lunch. If it's not working, call me back."

That seems concise. The systems administrator found out the account that's problematic and the facts that are ample for troubleshooting the system. Yet, to a person who's literate in

customer service techniques, this call is a failure. It doesn't address the person's problem, let alone recognize that a real colleague or customer can't get access to their account or files. It's impersonal, vague, and not reassuring that the problem is a priority.

Stay personable

When a machine breaks down and the user can't get his work done, it's frustrating, to say the least. Sometimes, those breakdowns can cost the organization thousands of dollars an hour in lost business or productivity. Lost revenue, wages, or competitiveness has given rise to a specialized area of customer service. Believe it or not, customer service experts have studied phone and email communications related to technology failures and found that it's very necessary to be highly personable in order to stay profitable.

Related Courses

- Help Desk Concepts
- A+ Remote Support Technician
- 2261 Supporting Users Running the Microsoft Windows XP Operating System

Use a system based on personable service

When a frustrated user contacts you, one of the first things that you can do to diffuse the situation is to personalize the call. Get the person's name and use it from the start of the call. People consider it a compliment when you use their name.

Tip 1: Ask about the problem

After you give the user the impression that you're interested in helping them, transition into the heart of the call: the questioning. Use open-ended questions to get him to describe the system problems and the business problems that result from the system problems.

Tip 2: Use language the caller understands

Always use language aimed at the user's level of technical understanding. Most people in an organization still don't know what a server is or does, let alone

know what type of server you might want to discuss. A safe rule of thumb: describe or ask in terms that somebody's grandparents might appreciate.

Tip 3: Weigh the security aspects of a problem

Never forget the security issues that may be at stake when a user calls with a problem. Consider whether there's a security vulnerability that exposes your system to hackers during the period the system is left unchecked. You may need to shift your work priorities in the short-term to fix a security breach.

You also want to assess security issues that may arise if you address the user's request. Sometimes, our first reaction to being yelled at over the phone is to immediately make the changes. Stay calm and always think security before you act. For instance, if a user calls you saying she's having trouble getting into an FTP site, she may not be authorized to access that area in the first place.

Tip 4: Get agreement

Because users get emotional, that can make you think a little less logically. That's why you should summarize the situation before you end the conversation. This serves two purposes:

- You let the person know that you've paid attention to them.
- You get confirmation that you've

captured the essence of the technical and business problems. The last part of the call should let the customer know that you're going to help in an amount of time that's proportionate to the magnitude of the work. If it's a significant technical problem, let them know what the average timeframe is to get the service available, such as an hour, a day, or a week. Be positive in your language and conclude the call by confirming your ability and desire to address their needs.

Address the technical problem

After you've gathered enough information about the user's needs, you'll have to assess what to do. This includes determining the level of emergency, troubleshooting the problem, identifying a solution, and determining which actions to take. What you do to address the technical aspects of the problem and when you do it should be performed in accordance with your department's requirements and weighed against your existing:

- Budget for fixing such problems.
- The timeframe and schedule you can accomplish the repair.
- Workload and goals.

Prioritize calls for help against business goals

Once you've gathered the data about the call, you'll need to prioritize it

against your already busy workload. A loud, demanding voice doesn't necessitate that you drop a critical security project — unless it's the president of the organization you work for. Everything you do requires prioritization. Just make sure that emails and phone calls don't disrupt your productivity to the extent that you accomplish very little.

Use a weighting system

You can assign priority to user requests and determine whether a request needs to be addressed immediately or if it can wait. Create problem categories and rank-order them by significance to the

organization. For instance, you might create categories that relate to financial magnitude, to department, or to security. It's a good idea to include your manager in the design of your weighting and ranking system, too.

Break your calls into three main parts

You may be like thousands of systems administrators who aren't going to memorize a list of logical steps in a customer service process. However, it's easy to remember three basic elements of great IT user service:

- Customer-centered opening.

Get Advice from the Experts — Attend These FREE WEBINARS

- **Sensational CS3: Top 10 New Features in Adobe CS3** on Tuesday, September 23 (10 a.m. Pacific; 12 p.m. CT; 1 p.m. ET)
- **ITIL: IT Service Management Overview** on Wednesday, October 8 (10 a.m. Pacific; 12 p.m. CT; 1 p.m. ET)
- **Top Tips & Tricks for Getting the Most Out of Microsoft Excel and Microsoft PowerPoint** on Wednesday, October 15 (10 a.m. Pacific; 12 p.m. CT; 1 p.m. ET)
- **Tips & Tricks for Creating Complex Documents with Microsoft Word** on Wednesday, November 12 (10 a.m. Pacific; 12 p.m. CT; 1 p.m. ET)

To register for this session and view the Webinar archive, click on www.NewHorizons.com/Webinars.

- Problem discussion.
- Solution-oriented closing.

Start with a customer-centered opening

Your users will call or write you because they believe that you have the answer to their problem. Again, it's not *the* problem, it's *their* problem. The key in a problem discussion is to begin the conversation by personalizing it. Get as much information as you can about the user's complaint, and try your best to relate to the problem as though both of you own the problem.

Begin the problem discussion

The problem discussion is what you want to move into after you've developed rapport with the other person. You may want to discuss two types of problems, because you'll need this information to make a sound decision:

- **The impact on your organization's business.** For example, "How is this affecting you right away?" Your user may tell you that he's going to miss an important deadline. You may want to formulate an alternative solution. For instance, if the authorized user is one of your staff members and he needs a file, you may be able to go into the system, access the file, and email it to him while you address the remote server access problem.
- **The technical problem.** For example, "Are you getting any error message?" Remember, if the user isn't technically sophisticated, keep the questioning in non-technical terms. Coach them in layman's terms. Get your users to describe what's happening in enough detail

that you can diagnose the problem from your technical perspective. They're frustrated enough when they call. Don't confuse them even more with acronyms or geek-speak.

Finish with commitment to the solution

The last part of any email or phone call with a user who has called with a problem about the system should be solution-oriented. You may or may not know what the problem is, but you can tell the user that you'll get to it. For example, "I want to get into the system right away and find out exactly what the problem is. It may take me a while, but I want to get the system working for you."

Both of these examples illustrate a systems administrator who wants to solve the problem. Of course, don't make promises that you can't keep, like having the system up and running in

five minutes when you're in the middle of an upgrade that has resulted in a few services being temporarily shut down. Not everyone wants you to do technical back flips. The person may just want to know that you're committed to solving the problem in a timely manner.

Create positive chatter

People talk about their customer service experiences, especially the bad ones. Your manager keeps an ear to the ground when trying to evaluate your annual performance. If you use a systematic process and techniques that produce results that align with your business needs and user needs, you probably can't help but do a great job as a systems administrator. That has to influence your career as much as any technical knowledge you might possess. 🌐



Copyright
 © 2008 Eli Journals. This work is an independently produced publication of Eli Research, the Content of which is the property of Eli Research or its affiliates or third-party licensors and which is protected by copyright law in the United States and elsewhere. The right to copy and publish the Content is reserved, even for Content made available for free such as sample articles, tips, and graphics, none of which may be copied in whole or in part or further distributed in any form or medium without the express written permission of Eli Research. Requests for permission to copy or republish any Content may be directed to Mark Lydard at (800) 508-1316.

Interested in a custom-content publication? Email us at customcontent@elijournals.com.