

## **PLTG Meeting – February 13, 2009**

### ***Call to Order***

Meeting called to order at 9:30am by Carol Gerber. The meeting was held at the office of Cadwalader, Wickersham & Taft at the World Financial Center.

Rob Holloway, IT director for Cadwalader was introduced and spoke briefly concerning Office 2007. Nicole was introduced as Cadwalader's lead trainer.

The need for more hosts was mentioned. There are no more firms volunteering and the need is now. Contact the Steering Committee for more information.

Membership Drive also mentioned and members are encouraged to begin the process now to ensure continued membership. It is only \$75.00 and this gives 3 persons from your firm access to the monthly meetings. Networking, training information etc. Thanks extended to the firms who have already renewed membership

### ***Update of Committee Meetings***

Update to by-laws is in process and may be ready for a vote during our next meeting.

Website Committee is working on changes to the website to make it more useful for PLTG members, including the question and answer forum that many of us have asked for. You should hear more about that at upcoming meetings.

Programs and Events Committee has been considering your suggestions.

### ***Next Meetings***

Friday, March 13, 2009. "The Risk Management Approach to Training" will be the topic

Friday, April 17, 2009. Due to Passover this will be a week late. The topic will be Podcasts. How to take advantage of new and evolving technology in training.

### ***Announcements***

If you were sitting at Roberta Gelb's table at the January planning meeting and talking about how to get your firm certified, please speak with Roberta.

### ***Trainer Spotlight***

Instead of hearing from a trainer, we are looking at training from the user's point of view to see the importance of training and why it is beneficial, in this Captain Sullenberger quote from a 2/10/2009 New York Post article available at [http://www.nypost.com/seven/02102009/news/regionalnews/key\\_for\\_captain\\_marvel\\_154415.htm](http://www.nypost.com/seven/02102009/news/regionalnews/key_for_captain_marvel_154415.htm):

"For 42 years, I had made small, regular deposits of education, training and experience," he said. "And the experience balance was sufficient that on January 15th, I could make a sudden, large withdrawal."

Let's help our users remember that small investments periodically will pay off greatly down the line.

## **Topic: Office 2007 – What's to Like?**

Greg Miller introduced by Carol Gerber and his topic focuses on the inevitability of this conversion and how it will affect our lives.

### **Synopsis:**

While the topic is not exactly about what's new in 2007, it will be centered on that as most all of it is new.

Greg begins his presentation with a disclaimer that if he doesn't mention something, he is learning the product and may not have experienced or know everything.

First, everything has been moved around. This lends to a frustration while you hunt and search for what you need. There is, however, a logic to the order and could be easier if you are a first time user of Word.

Files are smaller and more stable.

Fluent User Interface.

Graphic Interface is much more elegant. Working with graphics is much easier in this version. Graphics editing employ the Live Preview feature. Compression of graphics is also available.

Office Button Options explored.

Discussing Ribbons and how they change what you see. These can also be minimized and you will only see the menu bar items.

Quick Access Toolbar is manageable by the user and can contain items used all the time. It will appear, for example, when you highlight text and hover over that highlight. Font items will be opened right next to the highlighted area.

Status Bar is customizable and can display what you want to see.

Each menu item changes the ribbon below, and offers more options that currently exist on a regular toolbar. Screen Tips are still visible when you hover over an item.

On-Demand Tabs appear as necessary. Headers and Footers is an example of these which give access to items not used regularly. These will appear when you open a selection, for instance, Insert, Tables. This opens options specific to the items you are selecting.

Live Preview: Gives you better visual control over your document. When you open a ribbon item, hover over, for instance styles, the text will change in your view to show you how your selection will change the text. It will only change when you apply the option. Caveat: Not all items will preview in the document.

Quick Parts Option; Items saved on the fly are saved in the Quick Parts option under the Building Blocks organizer. Building Blocks is a template accessible for saved items to be used for other documents. Saving cover pages, equations, or other items are saved to the Building

Blocks Template. This can contain text, graphics, styles or any items you wish to save for future use.

Equation Feature has become much easier to use and is displayed from an On Demand Design tab.

Page Layout is now a menu item.

Watermarks are much simpler and incorporate the WordArt feature.

## Questions, Comments, Complaints

- Questions\Comments(Indicated)
  - Answers by Greg
    - Answers from the floor
- Is a “Where is This” Program advisable and do you recommend using one? What is your experience with users’ experience with these tools?
  - On the Microsoft Website, there is a feature that explains where things are for Office 2007. Greg would recommend using these tools and requests opinions from others who have rolled out this application:
    - End users do not feel positive due to the total difference in view; the Microsoft Where is This is absolutely excellent and the users love it as it can give the instant answers. The link is:  
<http://office.microsoft.com/assistance/asstvid.aspx?assetid=XT100766331033&vwidth=1044&vheight=788&type=flash&CTT=11&Origin=HA100744321033>
    - Time lag for being proficient on this for most users is usually about 6 weeks, but Stacey from Encore Tech noted that can be cut down with enough prior planning and training
    - Necessary to advertise and communicate and educate according to your firm’s needs
- Has legal blacklining been improved and has it been integrated with any DMS applications?
  - From the floor: It has improved and is easier to use;
- Is there integration with I-Manage Desksite and the pushpins in Word?
  - From experience, these are disabled as interference is inevitable between the applications
- Is the concept of direct formatting the same?
  - Yes. Styles still has the same utility. Whether or not direct formatting has the same impact with the new coding is unknown by Greg and he would be interested in anyone’s experience.

- It is possible to lock documents from direct formatting and allow only style use
- A request to show numbering.
  - From the Home option, edit the heading style although it can still be confusing
- When you open 2003 document in 2007, the style area does not reflect the correct style
  - One known issue has to do with styles refreshing but it will eventually refresh
  - Further conversation continued with multiple participants
- Comment: On Demand tabs sometimes do not show up or are not always the same
  - This has been experienced by multiples users on 2007; the workaround is to click on the tab involved
- Is there a tool recommended for trainers?
  - Yes, use Greg's materials and Microsoft tutorials

## Wrap-Up

Thanks to Greg for his presentation. The positive approach is refreshing as all we hear about is the negative.

Quick survey of the features we think our users will like the best:

Live Preview

Quick Access Toolbar

MiniBar

Building Block Template

Further thanks to Cadwalader and all those involved in making this meeting possible.

Reminder of the need for host offices and the willingness of PLTG to assist.