

1

Introducing Microsoft 365

7

Microsoft Office	8
Ribbon Technology	9
What's Needed	10
Installing Microsoft Office	11
Start an Application	12
Application Start	14
The Application Window	15
Your OneDrive	16
Live Preview	18
Working with the Ribbon	19
Quick Access Toolbar	20
Office Document Types	21
File Extensions	22
Compatibility Mode	23
Convert to the Latest Office Format	24

2

Create Word Documents

25

Create a Word Document	26
Enter Text	27
Select and Copy Text	28
Save the Document	30
Correct Proofing Errors	31
Change Proofing Settings	32
Apply Styles	33
Outline View	34
Insert a Picture	36
Page Layout	38
Display in Columns	39
Word Count	40
Create a Table	41
Convert Text to Table	42
Paste Special	43
Print Document	44

3

Complex Documents

45

Start a Booklet	46
Choose Page Arrangement	47
Create the Structure	48
Import Text	50
Insert Illustrations	52
Add Captions	53
Table of Contents	54
Table of Figures	56

Insert Preface	58
Update Table of Contents	59
Decorate the Page	60
Templates	62
Publisher	64
Create a Publication	65
Print the Publication	66

4

Calculations

67

Start Excel	68
Enter Data	70
Quick Fill	72
Sums and Differences	74
Formatting	76
Rounding Up	78
Find a Function	80
Goal Seeking	82
Templates	84

5

Manage Data

85

Import Data	86
Explore the Data	88
Sort	89
Filters	91
Number Filters	92
Select Specific Data	93
Create a Chart	94
Import a List	96
Create a Table	97
Add Totals to Table	98
Computed Column	100
Table Lookup	102
Manage Data using Access	104
Add Records	106

6

Presentations

107

Start a Presentation	108
Expand the Slide	110
Insert a Picture	111
Apply a Theme	112
Animations	114
Run the Show	115
Other Views	116
Presenter View	118
Choose a Template	120
Use the Template	122
Print the Slide Show	123
Rehearse Timings	124
Save As Options	125
Package for CD	126

7

Office Extras

127

Office Tools	128
Database Compare	129
Office Language Preferences	130
Spreadsheet Compare	132
Microsoft Store Tools	134
Office Lens	136
Third Party Office Tools	138
Windows 10 Tools	140
OneNote	142
OneNote 2016	144

8

Email

145

Starting Outlook	146
Your First Messages	148
Turn Off Reading Pane	149
Request a Newsletter	150
Receive a Message	152
Save All Attachments	154
Print the Message	155
Reply to the Message	156
Add Address to Contacts	157
Spam and Phishing	158
Create a Message	160
Insert a Signature	161
Message Tags	162
RSS Feeds	163

9

Time Management

165

Outlook Calendar	166
Schedule an Appointment	167
Change Appointment Details	168
Recurring Appointments	169
Create a Meeting	170
Respond to an Invitation	172
Add Holidays	174
Report Free/Busy Time	176
Schedule a Meeting	177
Creating Tasks	178
Assigning Tasks	180
Accepting Task Requests	181
Confirming the Assignment	182
Outlook Notes	184
Journal	186

10

Manage Files and Fonts

187

Device Setup	188
Library Location	190
Finding Files	191
Recent Documents	193
Change File Type	194
XML File Formats	195
Save As PDF or XPS	196
Fonts in Office	198
Create and Run ListAllFonts	200
Document Recovery	202

11

Up-to-Date and Secure

203

Office Updates	204
Apply Updates	206
Change Settings	207
Office Help	208
Explore Help Topics	209
Developer Tab	210
Remove Personal Information	212
Protect Your Documents	214
Restrict Permission	216
Trust Center	218

12

More Office Apps

219

Microsoft Teams	220
Microsoft Forms	221
Project	222
Visio	224
Microsoft Sway	226
Office Online	228
Office for iOS	230
More Office Mobile	232

Index

233

1

Introducing Microsoft 365

This chapter discusses the latest version of Microsoft Office, with its ribbon-style user interface. It identifies the range of editions, and outlines the requirements for installation. Also covered are: the process of starting applications; features used by all Office applications such as Preview and Save; Office document types; and compatibility with the older versions of applications.

- 8** Microsoft Office
- 9** Ribbon Technology
- 10** What's Needed
- 11** Installing Microsoft Office
- 12** Start an Application
- 14** Application Start
- 15** The Application Window
- 16** Your OneDrive
- 18** Live Preview
- 19** Working with the Ribbon
- 20** Quick Access Toolbar
- 21** Office Document Types
- 22** File Extensions
- 23** Compatibility Mode
- 24** Convert to the Latest Office Format



Microsoft Office suite is available for a one-time payment and based on the same applications as the subscription version – **Microsoft 365** (formally named **Office 365**).



OneNote for Windows 10 is now the default, and an Office version of OneNote is no longer included in Office or Microsoft 365. You can still use the previous OneNote 2016 if you desire.



Office Online (see pages 228-229) provides free web-based versions of the common apps, and Office Education provides special features designed for schools, teachers, and students.

Microsoft Office

Microsoft Office is a suite of productivity applications that share common features and approaches. There are two versions: Microsoft Office for one-time purchase, and Microsoft 365 on a regularly updated subscription basis.

There are various retail editions of Microsoft Office:

Office Home & Student edition contains:

- **Excel** Spreadsheet and data manager
- **PowerPoint** Presentations and slide shows
- **Word** Text editor and word processor

Office Home & Business edition contains all of the apps in the Home & Student edition, plus:

- **Outlook** Electronic mail and calendar

Office Professional edition contains all applications found in the Home & Business edition, plus two additional apps:

- **Access** Database manager
- **Publisher** Professional document creation

Similarly, Microsoft 365 has various subscription editions:

Microsoft 365 Personal edition contains all the apps (Excel, PowerPoint, Word, Outlook, Access and Publisher) for one individual – licensed for 1 PC, 1 tablet, and 1 phone.

Microsoft 365 Home edition also contains all the apps, but for an entire household – licensed for 5 PCs, 5 tablets, and 5 phones.

Microsoft 365 Business edition has all apps except Access, plus:

- **OneDrive for Business** Online file storage and sharing

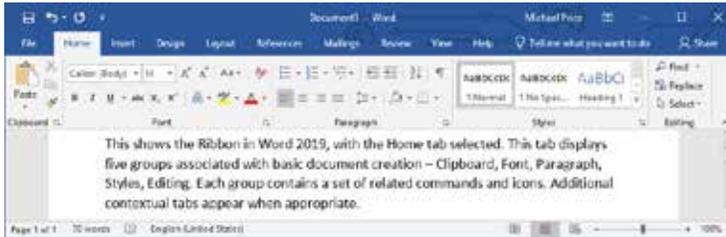
Microsoft 365 Business Premium edition contains all the apps found in Microsoft 365 Business (including OneDrive), plus these:

- **Microsoft Exchange** Hosted messaging solution
- **SharePoint Online** Collaboration web services
- **Skype for Business** Hosted communications service

Microsoft 365 Enterprise editions contain all applications found in Microsoft 365 Business Premium edition but also provide additional security and information management tools.

Ribbon Technology

Whichever edition of Office or Microsoft 365 that you have, the applications they provide will all feature the graphical user interface based on the Ribbon. This replaced the menus and toolbars that were the essence of earlier versions of Office.



The Ribbon contains command buttons and icons, organized in a set of tabs, each containing groups of commands associated with specific functions. The purpose is to make the relevant features more intuitive, and more readily available. This allows you to concentrate on the tasks you want to perform, rather than the details of how you will carry out the activities. Some tabs appear only when certain objects are selected. These are known as contextual tabs, and provide functions that are specific to the selected object. For example, when you select an inserted image, the **Picture Tools, Format** tab and its command groups are displayed.



The Ribbon interface also provides extended ScreenTips that can contain text, images, and links to more help. The tips display as you move the mouse pointer over an option, and describe the functions or give keyboard shortcuts. For example, move the pointer over the Chart command on the Insert tab.



This result-oriented user interface was first introduced in Office 2007, and now appears in all the applications in Office.



For systems with touch-enabled monitors, Office offers a **Touch Mode** ribbon with larger and more widely spaced icons (see page 14).



These are the minimum requirements. A higher-speed processor with additional memory will produce faster results.

What's Needed

To use Microsoft Office or Microsoft 365, you will need at least the following components in your computer:

- 1GHz processor (32-bit or 64-bit).
- 2GB RAM memory.
- 3GB available disk space.
- 1280 × 800 or larger resolution monitor.
- DirectX 10 graphics card.
- Any edition of Windows 10 or Windows Server 10.



Some functions will have additional requirements; for example:

- Touch-enabled monitor for controlling the system.
- Internet connection for online help.
- CD-ROM or DVD drive for installation, backup and data storage purposes.

Since your computer is required to run a version of Windows 10, the system specifications should meet and exceed the requirements for Microsoft Office or Microsoft 365.



These system properties are for the PC used in this book, which is running Windows 10 Pro. However, the tasks and topics covered will generally apply to any supported operating system environment.



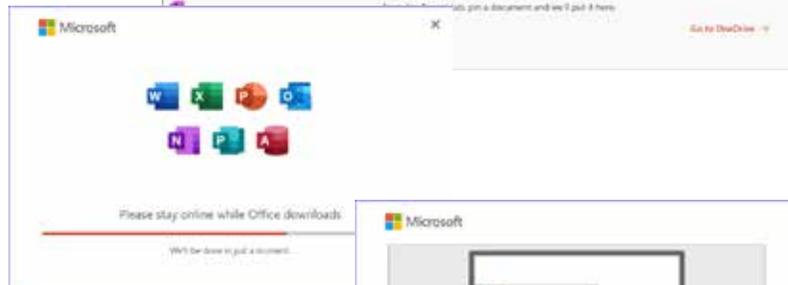
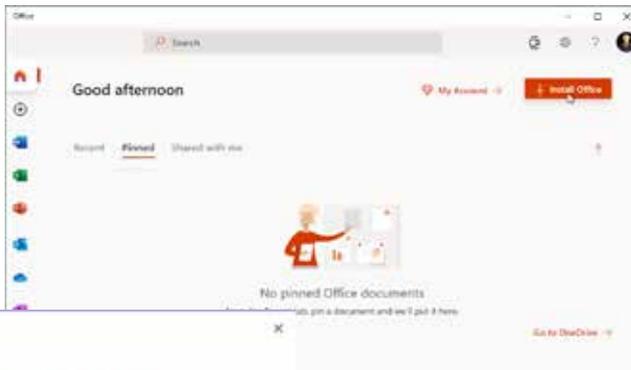
Installing Microsoft Office

You can buy your preferred version of Microsoft Office in disk format from a retail source, or download it directly from an online supplier or from Microsoft itself. However, Windows 10 provides the Office app on the Start menu. This checks the current status of Office on your system. If Office is not already installed, you'll be offered the opportunity to take on a one-month trial of Microsoft 365. This is the subscription-based version of Microsoft Office. When this trial ends, you can commit to a subscription for Microsoft 365 to work across multiple devices or choose the Microsoft 365 Personal version, which lets you use Office on one PC, one tablet, and one phone. This also gives you a massive 1TB of storage for one user.

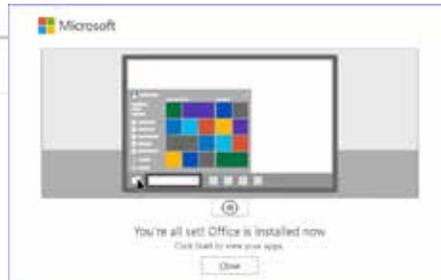
1 Click the **Office** Start menu tile or All Apps entry to check your Office status



2 If Office is not installed, choose **Install Office** and follow the prompts to begin the installation



3 When the install completes, you can explore the Office applications added



To compare the editions of Office and Microsoft 365, visit products.office.com/en-us/buy/compare-microsoft-office-products, where you can also try or buy the products.



Microsoft is eager to encourage adoption of the subscription versions – Microsoft 365 Personal edition also includes 60 minutes per month of Skype calls to cell phones and landlines.



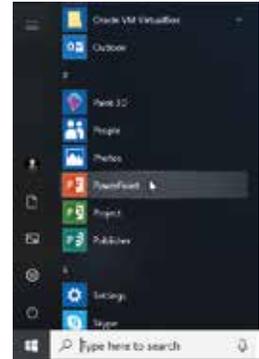


In Tablet or Full Screen mode, select Start then click the All Apps button to show the All Apps list.

Start an Application

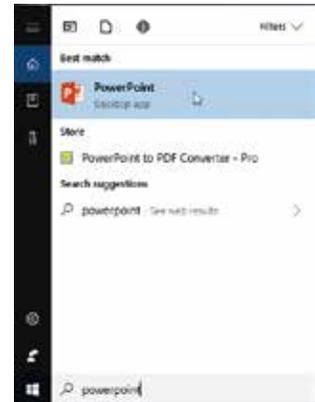
With Microsoft Office installed under Windows 10, you can use the Windows 10 Start menu to launch an Office application. For example, to start PowerPoint:

- 1 Select the Start button to display the All Apps list
- 2 Scroll the alphabetic listing to the **P** heading
- 3 Choose the **PowerPoint** entry to launch the PowerPoint application



To locate the application more quickly, use the Search box on the Taskbar:

- 1 Click in the Search box on the Taskbar
- 2 Begin typing the application name; e.g. powerpoint
- 3 Click the **PowerPoint** desktop app entry to launch the PowerPoint application



For even quicker access to the Office applications, add tiles to the Start menu:

- 1 Locate an Office application such as PowerPoint using the All Apps list as described above
- 2 Right-click the application entry and select **Pin to Start**, typing the application name; e.g. powerpoint
- 3 Repeat this procedure for each Office application



You can also right-click the desktop app in your Search results to choose to **Pin to Start** (or to choose **Pin to taskbar**).

...cont'd

- 4 Click Start to display the Start menu, resize and arrange the Office application tiles, and provide a group name



You can resize desktop app tiles as Medium or Small, but the Wide and Large options are not available.

- 5 Now, to launch an Office application, select Start and click the appropriate tile

You can place icons on the Taskbar for the applications you use most frequently.

- 1 Right-click the application entry on the All Apps list, and select **More**, then **Pin to taskbar**



- 2 Repeat this procedure for any other frequently used Office application



- 3 Your frequently used applications will now be available by simply clicking an icon on the Taskbar



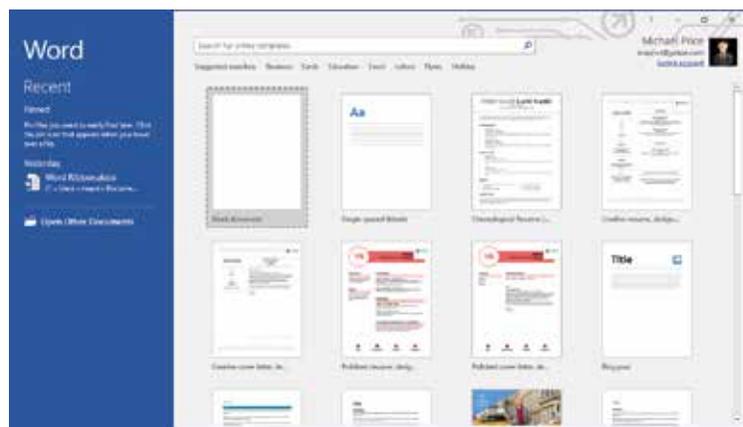
If you have a microphone and Voice Recognition enabled on your system, you can command Cortana to launch an application, by saying, for example, "Hey Cortana. Start PowerPoint".

Application Start



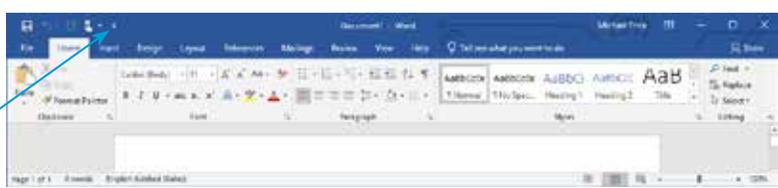
Document-based Office applications open at the Start screen with the **Recent** list and various document templates.

- 1 Select an Office application item such as Word, using any of the methods described on pages 12-13, to display that application's Start screen



The Touch/Mouse Mode button appears by default when you have a touch-enabled monitor. To add it if not displayed, click the Customize Quick Access Toolbar button and then select Touch/Mouse Mode. You can then display the enlarged Ribbon on a standard monitor.

- 2 Select **Blank document** to begin a new editing session with an empty document



- 3 Click the Touch/Mouse Mode button on the Quick Access Toolbar, and then select **Touch**



- 4 The expanded Ribbon is displayed, with extra space between the icons and commands, making them easier to select by touch



The Application Window

When you start an Office application such as Excel, PowerPoint or Word, the program window is displayed with a blank document named “Book1”, “Presentation1”, or “Document1” respectively.

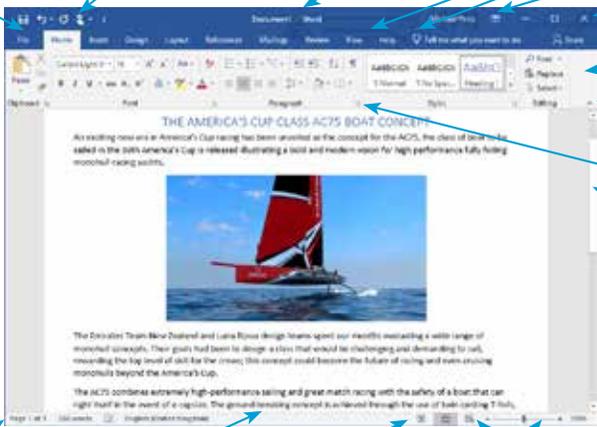
Using Word as an example, parts of the application window include:

Backstage
(File tab)

Quick Access Toolbar

Document name

Tabs



- “Tell Me” Help box
- Ribbon Display options
- Minimize/Restore/Close
- Ribbon Command icons (display lists or galleries)
- Collapse the Ribbon
- Group launch button (shows dialog box)
- Vertical scroll area

Status bar

Horizontal scroll bar
may appear here

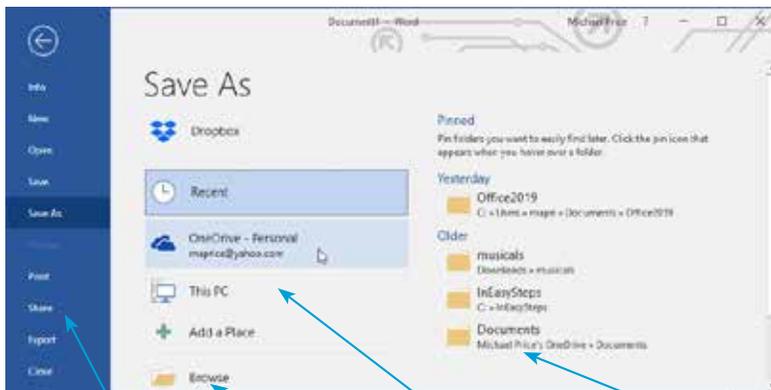
View buttons

Zoom level



The **Tell Me** Help box is available in Word, Excel, Outlook, and PowerPoint.

When you have updated your document and want to save your progress so far, click **File** to display the Backstage command screen and then select **Save** to name and save the document. You can save it in your OneDrive (see page 16) or on your computer.



File commands

Browse the
selected location

Save locations

Recent folders



From Backstage you can select **Info** for details about your document, or **New** to start another document, or **Open** to display an existing document. There are also printing and sharing options provided.



OneDrive was previously known as SkyDrive. When you set up a Microsoft Account to sign in to Windows, you are assigned an allowance of up to 5GB online storage, which is managed on the Microsoft OneDrive server (see also page 228). A Microsoft 365 subscription gives you a further 1TB of storage (correct at the time of printing).



OneDrive lets you access and edit your documents from any computer where you sign in with the same Microsoft Account. You can also access your OneDrive and documents from a web browser.

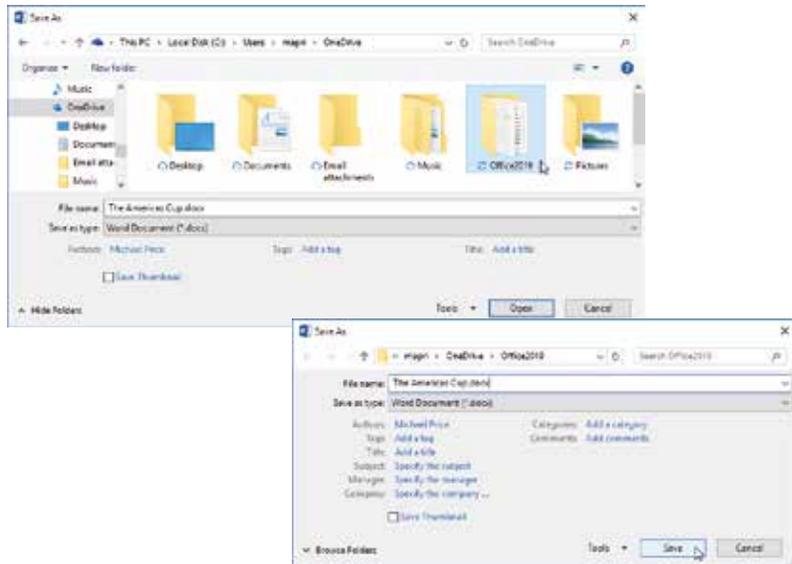
Your OneDrive

To save documents to your OneDrive online storage:

1 Select **File, Save As**, then click the OneDrive button

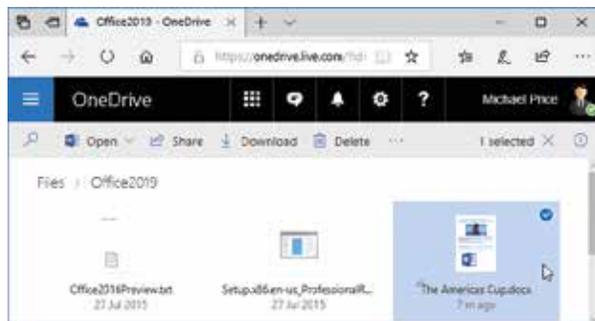


2 Confirm or amend the document name, then choose the appropriate folder (e.g. Office2019) and click **Open**



3 Click **Save** to upload the document and save it to your OneDrive folder

4 To access your OneDrive from a browser, go online to **onedrive.live.com**, and sign in if prompted



...cont'd

If you have a new system, or have just updated to Windows 10, you may be required to configure OneDrive.

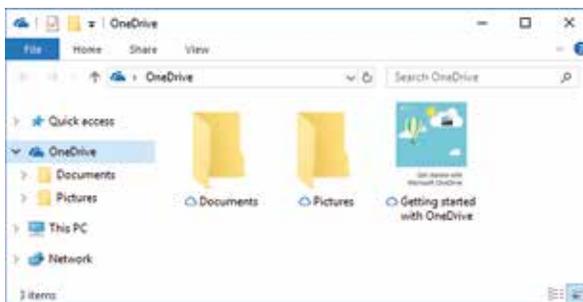
- 1 Select OneDrive and if asked to set up OneDrive, enter your Microsoft Account email and click **Sign in**



- 2 Enter your Microsoft Account password, and follow the prompts to complete the setup



- 3 Click **Open my OneDrive folder** to see the initial features



To start with, you'll have a Documents folder and a Pictures folder, plus an advisory document. You can create more folders, and these will be synced with your online OneDrive and accessible from any device where you sign in with your Microsoft Account.



By default, the local copies of your OneDrive files will be stored in your personal folder on your hard drive, though you can change the location during setup.



The files on your OneDrive can be online, and downloaded when needed and flagged as Available. You can mark important files as Always keep on this device.



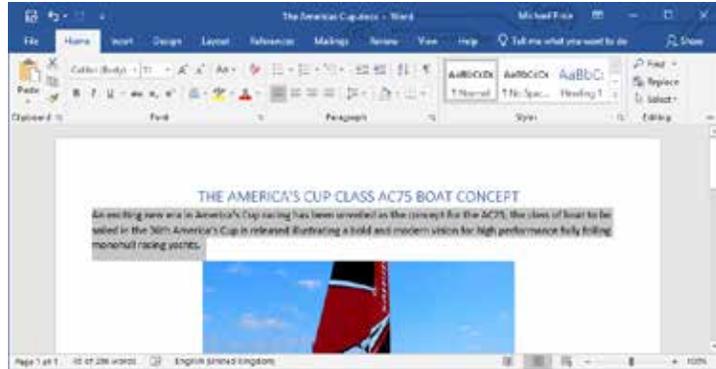


In earlier versions, you would be shown a preview of the new font or style using a small amount of sample text. Office now displays full previews.

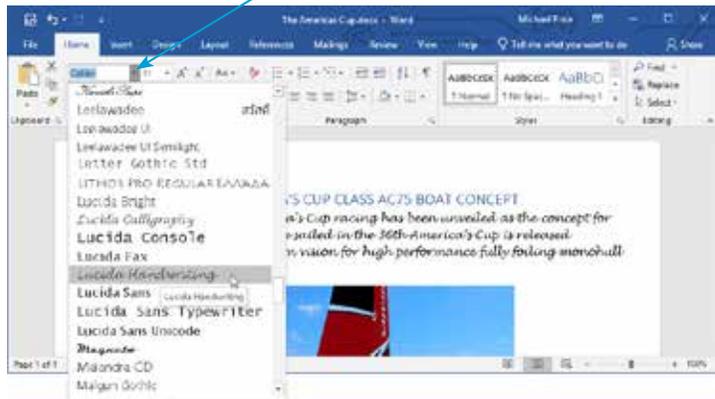
Live Preview

With the Ribbon interface, you can immediately see the full effect of format options, such as fonts and styles, on your document by simply pointing to the proposed change. For example, to see font formatting changes:

- 1 Highlight the text that you may wish to change, then select the **Home** tab



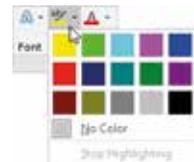
- 2 Click the arrow next to the **Font** box and move the mouse pointer over the fonts you'd like to preview



The selected text is temporarily altered to show the font (or the font size, color or highlight) you point to.

- 3 Click the font you want to apply to the text, or press **Esc** to close the options

- 4 Similarly, you can preview Text Effects, Highlight Colors and Font Colors



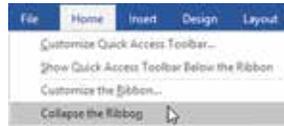
Working with the Ribbon

The Ribbon takes up a significant amount of the window space, especially when you have a lower-resolution display. To hide it:

- 1 Click the **Collapse the Ribbon** button (see page 15), or



Right-click the Tab bar and select **Collapse the Ribbon**



- 2 The Quick Access Toolbar and the Tab bar will still be displayed while the Ribbon is minimized

- 3 The Ribbon reappears temporarily when you click one of the tabs, so you can select the required command

- 4 Alternatively, press and release the **Alt** key to display keyboard shortcuts for the tabs



- 5 Press **Alt** + *shortcut key* (for example, **Alt** + **H** to select Home) and display the Ribbon and shortcuts for that tab



You can also select **Ribbon Display Options** on the Windows title bar and choose **Show Tabs** to hide the Ribbon, or **Show Tabs and Commands** to reveal the Ribbon.



Hold down the **Alt** key and press the keys in sequence for a two-letter shortcut, such as **Alt** + **FS** (Font Size), and press **Esc** to go back up a level.

Quick Access Toolbar

The Quick Access Toolbar contains a set of commands that are independent of the selected tab. There are five buttons initially:



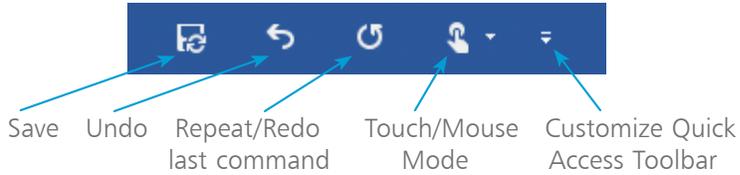
You can right-click any command on the Ribbon and select **Add to Quick Access Toolbar**.



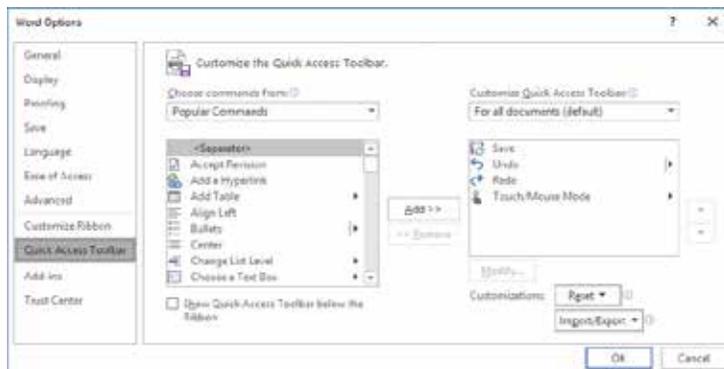
The **Save As** dialog will open the first time you press the **Save** button for a new document.



You can also click the **File** tab, then select the application **Options** and select **Quick Access Toolbar** to display this dialog box.



- 1 Click the **Save** button to save the current contents of the document to your OneDrive, or to the drive on your PC
- 2 Click **Repeat** to carry out the last action again, or click **Undo** to reverse the last action, and click again to reverse the previous actions in turn
- 3 When you have pressed **Undo**, the **Repeat** button changes to become the **Redo** button, which will re-apply in turn the actions that you have reversed
- 4 Click the **Customize** button to add or remove icons, using the shortlist of frequently referenced commands
- 5 Click **More Commands...** to display the full list of commands, then add and remove entries as desired



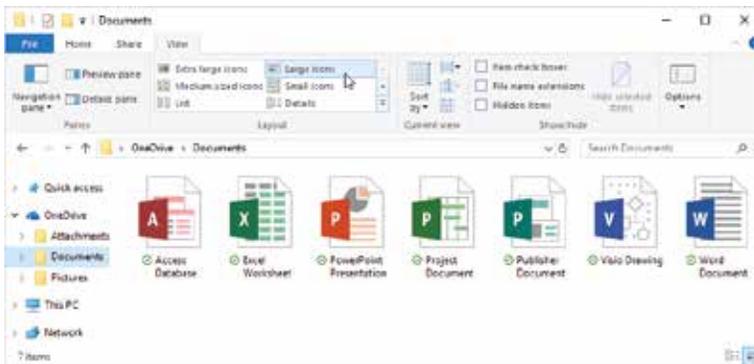
Office Document Types

The files you create using the Office applications will be office documents of various types, including:

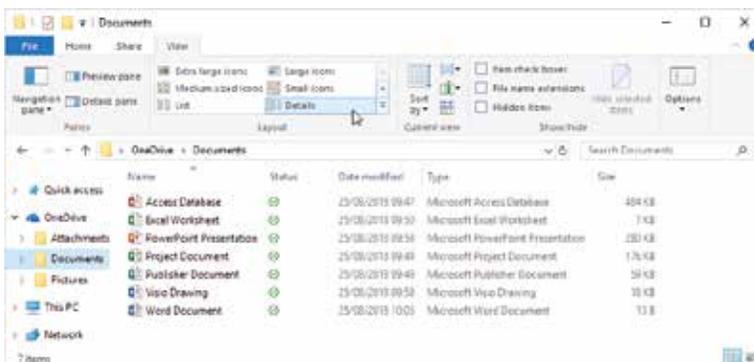
- **Word document** Formatted text and graphics
- **Publisher publication** Flyers and brochures
- **Excel worksheet** Spreadsheets and data lists
- **PowerPoint presentation** Presentations and slide shows

Each item will be a separate file. Typically, these may be saved in your OneDrive Documents folder (or locally on your computer).

- 1 To review your files, open File Explorer and select your OneDrive Documents folder



- 2 This shows each file as a large icon plus name and OneDrive status. For other styles, click the **View** tab and select, for example, **Details**, to show additional file information such as date modified, type and size



You can specify another folder or sub-folder to organize particular sets of documents.



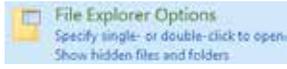
Right-click the header line for Details, and you can select other file attributes such as Date created, Authors, Dimensions, etc.

File Extensions

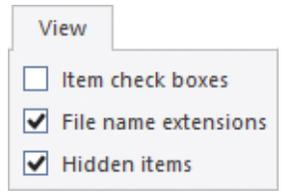
To see the file extensions that are associated with the various document types:



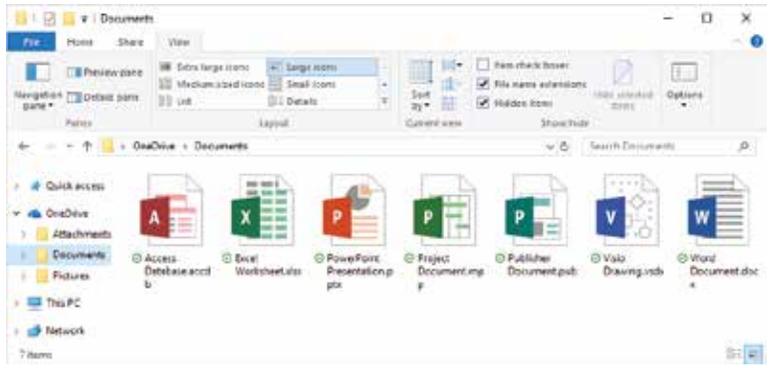
You can also change File Explorer Options in the Control Panel, under **Appearance and Personalization**.



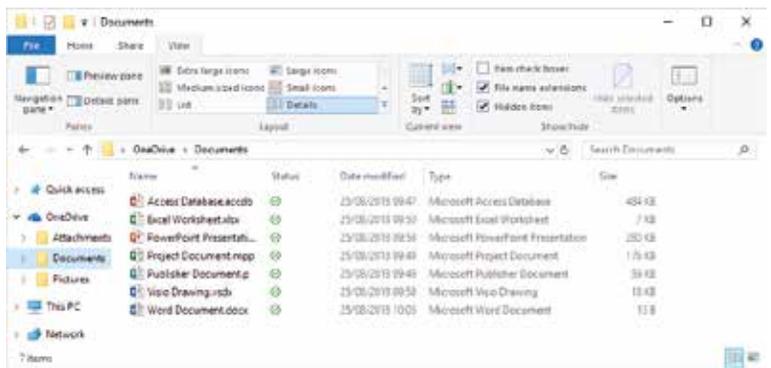
- 1 In File Explorer, select the **View** tab and in the **Show/Hide** section of the Ribbon click the box labeled **File name extensions**. Select **Hidden items** also, if you want to check if there are any hidden files in your folder



- 2 View the contents of your OneDrive Documents folder



- 3 The file extension will be shown alongside the file name, whichever folder view you choose; e.g. in Details view

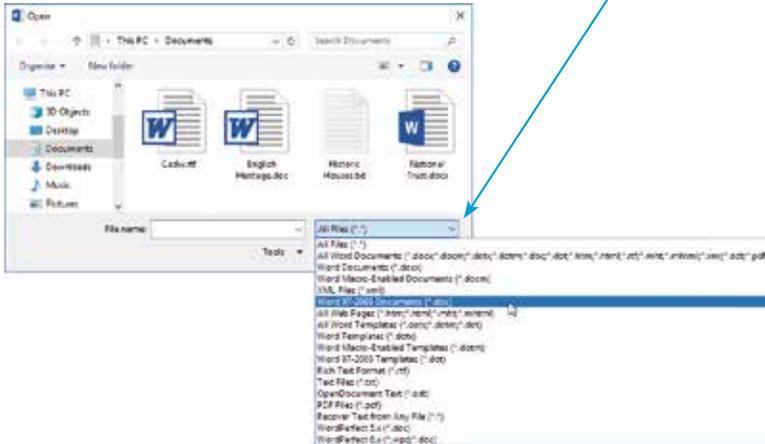


Files saved in Office use OpenXML formats and extensions; for example, **.docx** and **.xlsx**. Older Office files will have file types such as **.doc** and **.xls**.

Compatibility Mode

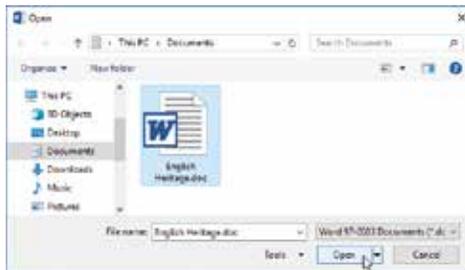
Office will open documents created in previous versions of Office applications; for example **.doc** (Word) or **.xls** (Excel).

- 1 Click the **File** tab and select **Open**, then **Browse**. Choose your Documents folder then click the Down arrow to display the list of document types supported



You may need to save documents in Compatibility Mode, as some users you wish to share files with may not have the latest version of Office.

- 2 Choose the document type (**Word 97-2003** for example) then select a specific file (e.g. **English Heritage.doc**)



- 3 Documents created in previous versions (including **.docx** files from Word 2010) are opened in Compatibility Mode



Compatibility Mode prevents the use of new or enhanced features, so the documents can be used by systems with older versions of the applications.

Convert to the Latest Office Format

If you have opened a document in Compatibility Mode, you can convert it to the latest Office format.



You can also click the **File** tab, select **Save As**, and choose the standard Office format (e.g. Word Document) to carry out the conversion.

1 Select the **File** tab and **Info**, then the **Convert** button

2 Click **OK** to confirm, and the file type will be amended



Converting will create a file of the same name, but with the latest Office format extension. The original file will be deleted.

3 To replace the original file, select **File** and then **Save** – see the file extension change in the Word title bar to the new **.docx** file type



With **Save As**, you have the option to change the file name, and the location for the new document.

4 To retain the original while creating a new file in the latest Office format, you'd select **File**, **Save As**, and then click the **Save** button

