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1 Introducing Microsoft 365

This chapter discusses the latest version of Microsoft 365 and its associated apps and services. It identifies the range of editions and outlines requirements for installation. Also covered are: Ribbon technology; the process of starting apps; features used by the Microsoft 365 productivity apps such as Save and AutoSave; Microsoft 365 document types; and compatibility with older versions of Microsoft apps.

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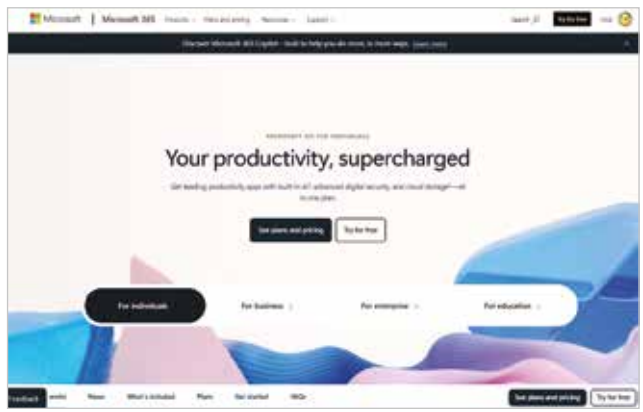
Microsoft 365

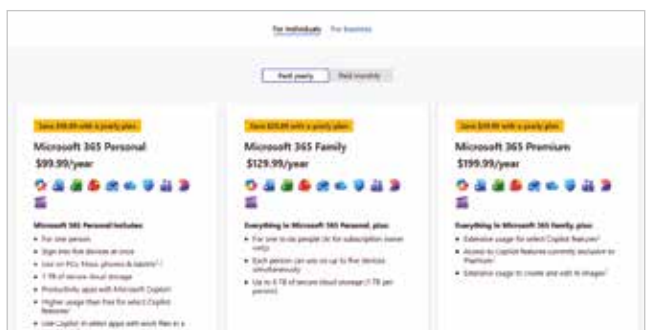
Microsoft 365 is a suite of productivity apps and services that share common features and approaches. There are several versions of Microsoft 365, on subscription. These include:

- For individuals
- For business
- For enterprise
- For education

To find the right version for you, go to the Microsoft website at **microsoft.com/microsoft-365** to view the options.



Click on the **For individuals**, **For business**, **For enterprise**, or **For education** buttons to view options for each category.



Microsoft 365 replaces what was previously known as Office 365 and the apps within it, principally Word, Excel, and PowerPoint. In some areas of Windows there may also still be references to these items as Office apps, but they are now part of the Microsoft 365 ecosystem.

For details about downloading and installing Microsoft 365, see page 13.

The **NEW** icon pictured above indicates a new or enhanced feature introduced with Microsoft 365.

Elements of Microsoft 365

Microsoft 365 has developed considerably over the years. Originally Office for Windows and then Office 365, it started life as a range of productivity apps for computers with the Windows operating system – primarily Word, Excel, and PowerPoint. These apps are still a significant part of Microsoft 365 but it has expanded considerably, not only in the range of apps that it includes, but also with its evolution to a cloud-based system of apps and services that can be accessed on a variety of linked devices using the same Microsoft Account, and online through Microsoft's online services.

Some of the elements of Microsoft 365 are:

- **Word**. This was one of the original apps when Office for Windows was released, and is still the world's number-one word-processing app.
- **Excel**. Another Office for Windows original app, this is a powerful spreadsheet option that is also widely used.
- **PowerPoint**. The third of the original trio of Office for Windows apps, PowerPoint has become synonymous with business presentations.
- **OneDrive**. This is Microsoft's online cloud service for storing and sharing content, and its services bring many of the elements of Microsoft 365 together online.
- **Copilot and M365 Copilot**. The Artificial Intelligence (AI) elements of Microsoft 365, with M365 Copilot being designed specifically for this purpose.
- **Designer**. This is a creative AI app for a range of design and image-creation options.
- **Clipchamp**. Another AI app, for editing and creating video.
- **Outlook**. This is the communication app that now incorporates Mail, Calendar, and People (address book).
- **Teams**. This is a collaboration app, used primarily for communication and collaboration in the workplace.

Microsoft 365 is a subscription service that is purchased online. The included apps and services are downloaded from the Microsoft 365 website, and they are updated from here too, when required.

The versatile note-taking app OneNote is also included with Microsoft 365.

Copilot and M365 Copilot are both new features in Microsoft 365.

Microsoft Designer and Microsoft Clipchamp are both new features in Microsoft 365.

…cont'd

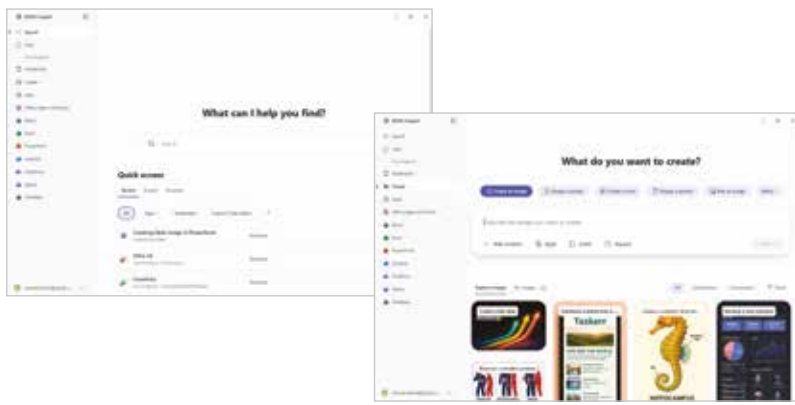
Microsoft 365 embraces AI

Microsoft 365 has fully embraced the digital revolution in AI, and it is incorporated into several elements of the ecosystem. Some ways in which AI is used in Microsoft 365 are:

M365 Copilot is a new feature in Microsoft 365.

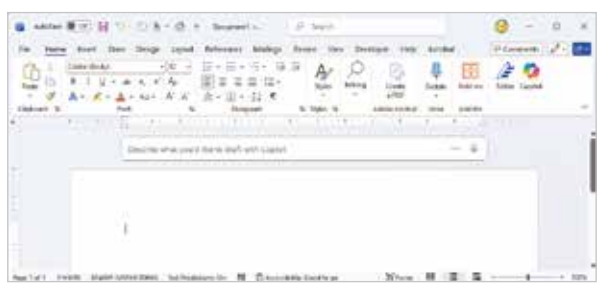
- **M365 Copilot**. Copilot is the Microsoft AI assistant that is included with the Windows operating system. It can be used to answer queries, write text, create images and graphics, write computer code, and much more. The M365 Copilot app is an extension of this, designed specifically to be used with Microsoft 365. It harnesses the same power of Copilot but it also has additional features for accessing content created by Microsoft 365 apps, accessing the apps themselves directly, and creating a range of impressive graphical content.

Copilot is known as a generative AI chatbot, and it uses the same technology as the widely used ChatGPT app.



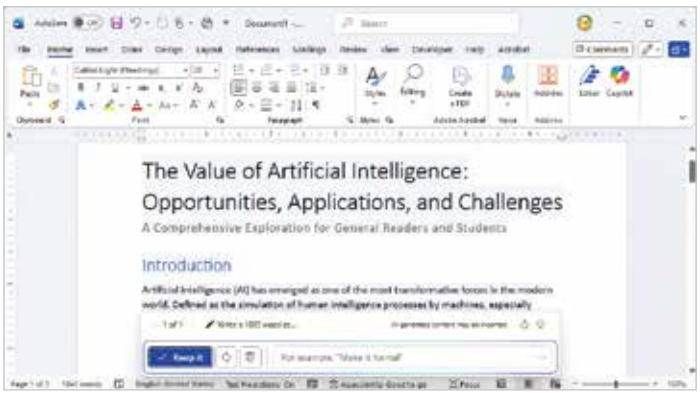
- **Copilot in productivity apps**. The main productivity apps in Microsoft 365 – Word, Excel, and PowerPoint – have all been enhanced with the AI capabilities of Copilot. For instance, in Word, a Copilot query box is available at the top of a new, blank document.

Check out AI for Seniors in easy steps at www.ineasysteps.com to get a better understanding of AI.



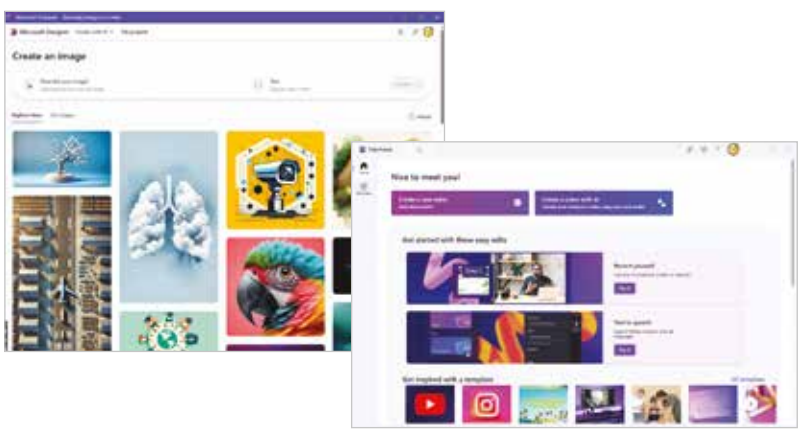
Content can be created by entering a prompt into the Copilot query box, such as creating an essay on a specific topic, and of a certain length:

Text is created as a draft, based on the prompt.



In Word, Excel, and PowerPoint, the Copilot panel can be accessed, opening to the right of the main window, by clicking on this icon on the Ribbon.

- **Microsoft Designer and Microsoft Clipchamp**. These two Microsoft 365 apps use AI extensively to create stunning design content and video clips.



When opening PowerPoint, there is an option on the **Start screen** for creating a presentation using Copilot. Click on the **Create with Copilot** button to do this.

Microsoft Designer and Microsoft Clipchamp are both new features in Microsoft 365. See Chapter 10 for more details about Designer and Clipchamp.

System Requirements

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

- 1.6 GHz processor (32-bit or 64-bit).
- 2GB RAM memory.
- 4GB available disk space.
- 1280 × 768 or larger-resolution monitor.
- DirectX 9 or later graphics card.

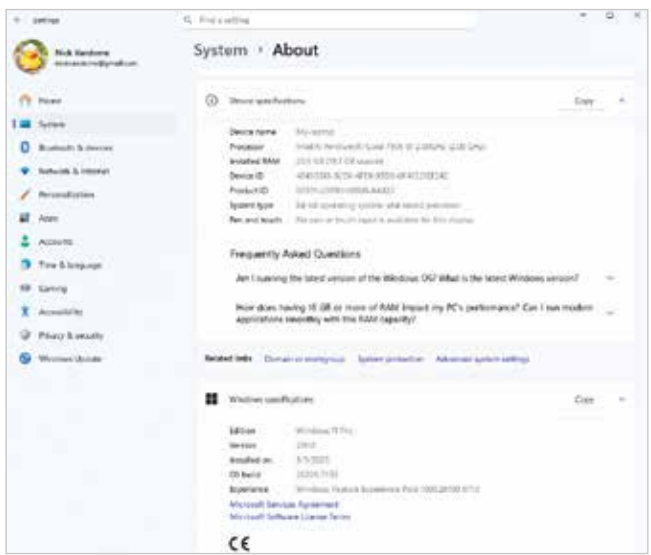
- Any edition of Windows 11 or Windows Server 11.

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

Some functions will have additional requirements; for example:

- Touch-enabled monitor for controlling the system.
- Internet connection for installation, backup, and storage (using the OneDrive functionality), and online help.

Since your computer is required to run a version of Windows 11, the system specifications should meet and exceed the requirements for Microsoft 365, which can be checked in **Settings** > **System** > **About** on a Windows 11 computer.

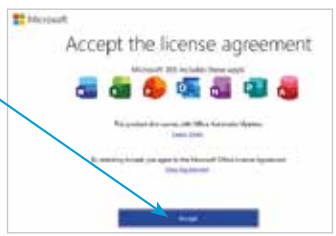


Installing Microsoft 365

All versions of Microsoft 365 are now purchased via a monthly or yearly subscription, and are delivered by an online digital download. Previous versions were available on DVDs, but the emphasis is now very much on online delivery. To buy, download, and install a version of Microsoft 365:

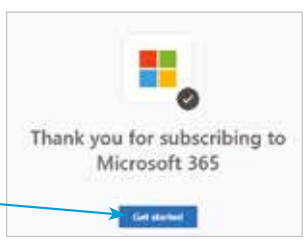
1. Identify the required version, as shown on page 8, and click on the **Buy now** button for an annual subscription or the monthly option, or the **Try free for 1 month** option

2. Click on the **Accept** button to accept the licensing agreement for Microsoft 365 and its apps



3. The installation wizard goes through the steps for installing Microsoft 365, and shows how the process is progressing

4. When the installation process has been completed, you will be notified that you are subscribed to Microsoft 365. Click on the **Get started** button



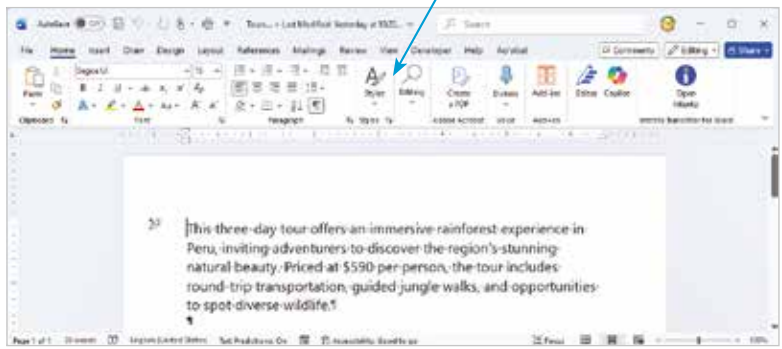
To compare the editions of Microsoft 365, visit **microsoft.com/en-us/microsoft-365** where you can also try or buy products.

Once Microsoft 365 has been installed, all of the relevant apps will be available from the **Start** menu. If any items are not available, they can be downloaded from the Microsoft Store.

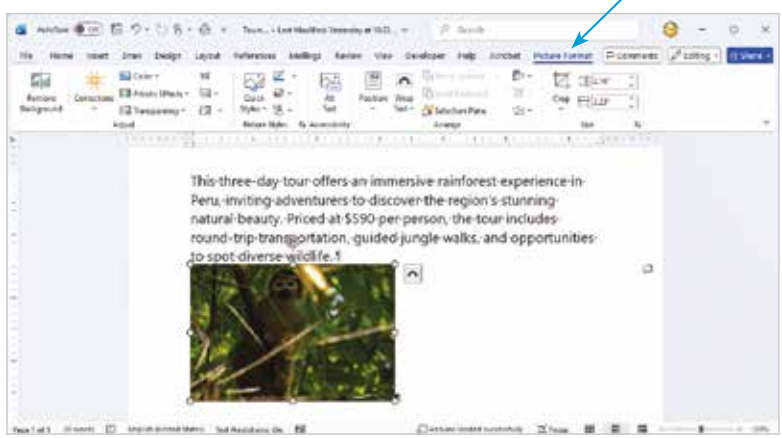
For more help with the **Start** menu in Windows 11, check out Windows 11 in easy steps and Windows 11 for Seniors in easy steps at www.ineasysteps.com

Ribbon Technology

Whichever edition of Microsoft 365 you have, some of the main apps they provide (Word, Excel, and PowerPoint) will all feature the graphical user interface based on the Ribbon.



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 tasks you want to perform, rather than 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 Format** tab and its command groups are displayed.



For systems with touch-enabled monitors, Microsoft 365 offers a **Touch Mode** ribbon with larger and more widely spaced icons (see page 24).

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 tips. For example, in Excel, move the pointer over the **Charts** command group on the **Insert** tab.

Expanding Ribbon items

Some items on the Ribbon expand and contract, depending on the size of the app window in which it is being displayed. For instance, when viewing a Word document in this example:

1. When the Word window is relatively narrow, the options on the Ribbon consist of a single icon. Options for these can be accessed from the down-pointing arrowhead below the icon; e.g. for the **Styles** option, which reveals related options

2. When the app window is expanded, some of the items also expand on the Ribbon, so their options are accessible here

Live previews

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 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 fonts you'd like to preview

3. Similarly, you can preview **Text Effects**, **Highlight Colors**, and **Font Colors**

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

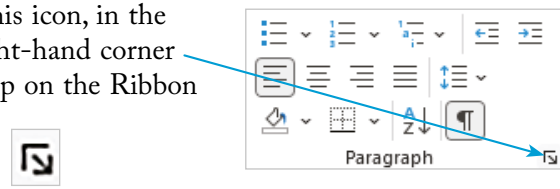
…cont'd

Group settings

Some of the groups on the Ribbon have their own settings. To view these for individual groups:

1. Click on this icon, in the bottom right-hand corner of the group on the Ribbon

If a group does not display the icon shown in the first Step 1, this means that there are no additional settings for the item.



2. Related group settings are displayed

Collapsing the Ribbon

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

1. Right-click the **Home** tab 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 that 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**) to display the Ribbon and shortcuts for that tab

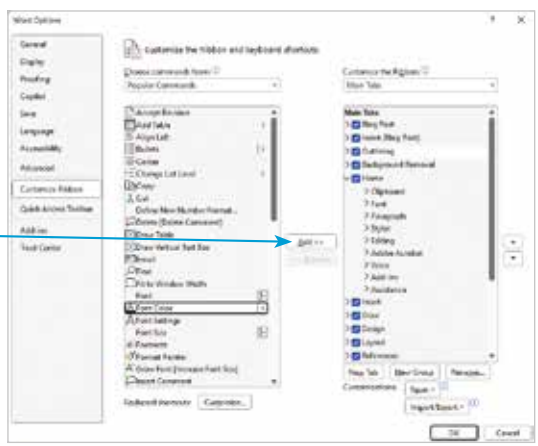
Hold down the **Alt** key and press the keys in sequence for a two-letter shortcut, such as **Alt** + **FS** (Font Size), and press **Esc** to go back up a level.

Customizing the Ribbon

Elements on the Ribbon can be customized so that you can quickly access exactly what you want. To do this:

1 Right-click in an empty space in any section of the Ribbon, and select **Customize the Ribbon...**

2 Click on an item in the left-hand panel, and click on the **Add** button to add it to the Ribbon. Click on an item in the left-hand panel and click on the **Remove** button to remove it from the Ribbon



The **Customize Ribbon** options in Step 2 can also be accessed from the **File** tab in either Word, Excel or PowerPoint, as shown on page 19.

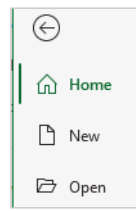
File Section

Although the **File** tab is located on the Ribbon in Word, Excel, and PowerPoint, its functionality is displayed in a separate window, with its own range of options. To use the File section:

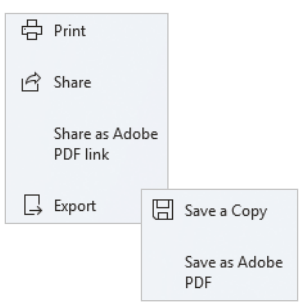
The currently active item is highlighted in the sidebar, with a vertical colored bar to its left.

1. Click on the **File** tab on the Ribbon. This does not display an underline (blue in the case of Word and green in the case of Excel) since as soon as it is clicked, it moves to its own section

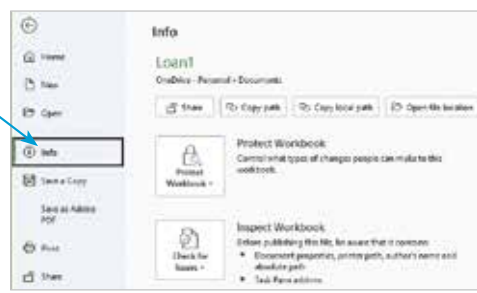
2. The File options are displayed in the left-hand sidebar. Click on the **Home** option to return to the File homepage. Click on the **New** option to create a new document. Click on the **Open** option to open an existing document



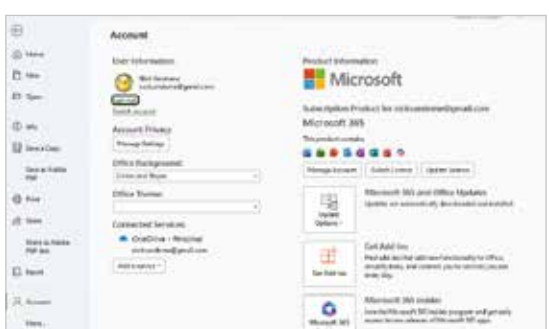
Other options in the File section include **Print**, **Share**, **Share as Adobe PDF link**, **Export**, **Save a Copy**, and **Save as Adobe PDF**.



3. Click on the **Info** option to access a range of options relating to the current document, such as **Share** options and those for protecting the document against unwanted editing changes



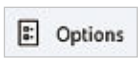
4. Click on the **Account** option to view details about your Microsoft 365 subscription

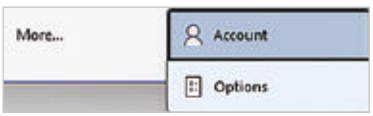


File Options

Within the File section there are also a number of general settings, known as **Options**, for Word, Excel, and PowerPoint. To access these:

1. Click on the **File** tab on the Ribbon of the respective app, and click on the **Options** button in the left-hand sidebar or, if the **Options** button is not visible due to the size of the window, click **More...** and then **Options**

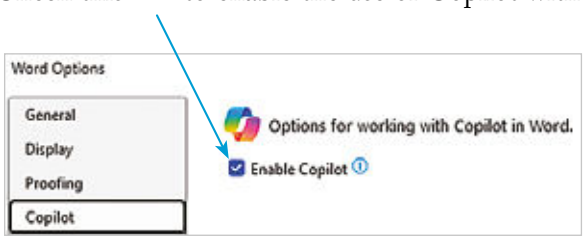




2. The **Options** categories are displayed in the left-hand sidebar. Click on a category to view its content in the main panel

3. Some of the categories are similar across all three apps, such as **General** and **Language**, while others are more specific to each app, such as **Proofing** for Word

4. For all three apps, there is an **Enable Copilot** option. Check this **On** to enable the use of Copilot with the apps



For Excel, the **Formula** and **Data** categories are specific to the app. For PowerPoint, the **General** category contains **Design Suggestions**, which can be used when creating PowerPoint slides.

For details about using Copilot with Word, Excel, and PowerPoint, see Chapters 2, 4, and 6 respectively.

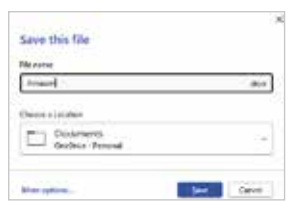
Save and AutoSave

Losing work that you have done on a computer, due to either a software or hardware malfunction, can be one of the most annoying aspects of the digital world. However, in the main Microsoft 365 apps – Word, Excel, and PowerPoint – there is a function that saves work automatically. This is known as AutoSave, and it can be activated when you first save a file. To do this:

1. Open a new document in Word, Excel or PowerPoint. At this point, the **AutoSave** option on the **Quick Access Toolbar** is displayed as **Off** and the document does not have a unique name

2. Click on this icon on the **Quick Access Toolbar**

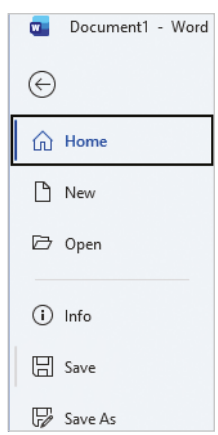
3. In the **Save this file** dialog box, give the file a name and ensure that **OneDrive - Personal** is selected as the file destination. Click the **Save** button



Save a new document as soon as it is created, to ensure that **AutoSave** is activated and that you do not lose any work.

Alternatively:

1. Click on the **File** tab on the Ribbon and select either the **Save** or **Save As** option (they both perform the same function at this stage)



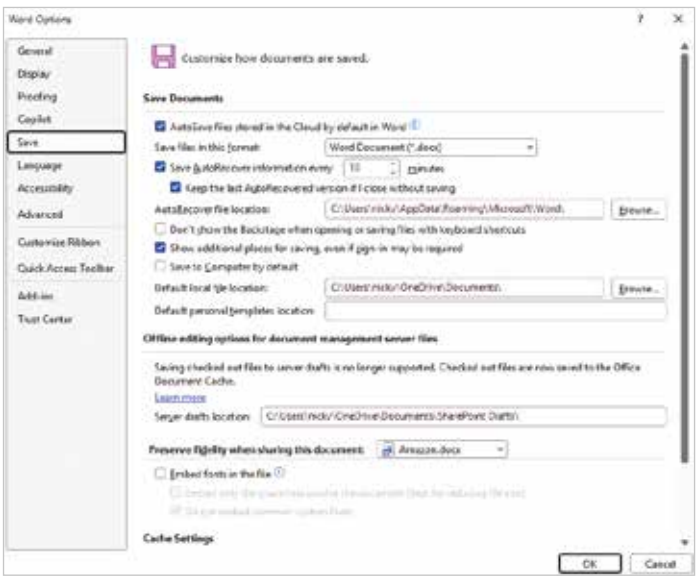
2. Save the file to a OneDrive location

As long as the file has been saved to a OneDrive location, the **AutoSave** option will now display as **On** on the **Quick Access Toolbar**. The document will now be saved automatically as you work on it.

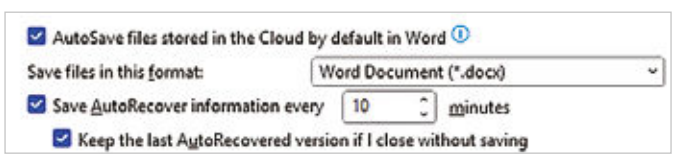
Save settings

There are settings for numerous areas of Microsoft 365 and its apps, as shown on pages 18-19. Some of these settings can be used in relation to saving documents and AutoSave, and it is very useful to have a look at these before you start creating and saving documents. To do this:

1. For a Word, Excel or PowerPoint document, access the **Options** section, as shown on page 19, and click on the **Save** option in the left-hand sidebar



2. Make selections, as required, but ensure that the **AutoSave files stored in the Cloud by default in Word** (or Excel or PowerPoint) option is checked **On**



3. Check **On** the **Save AutoRecover information every** checkbox and select a time period, as required

To save files into the cloud, as in Step 2, a Microsoft Account is required and OneDrive has to be set up.

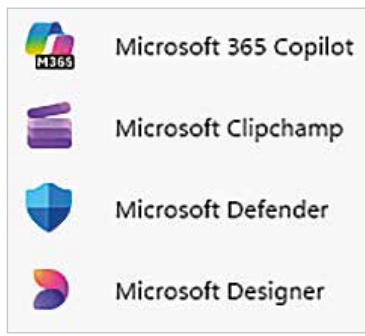
A Microsoft Account can be created when you first set up Windows 11, whenever an app that requires it is first accessed, or in **Settings** > **Accounts**. A Microsoft Account can be set up, for free, using an email address and a password.

Open an App

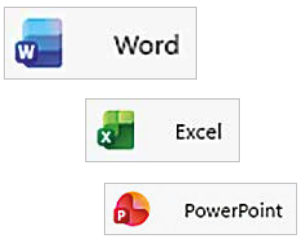
With Microsoft 365 installed under Windows 11, you can use the Windows 11 **Start** menu to launch an app. For example, to view and open Microsoft 365 apps:

1. Select the **Start** button to access the **Start** menu and click on the **All** button

2. Scroll through the apps until you find the required Microsoft 365 option. Click on an app to open it



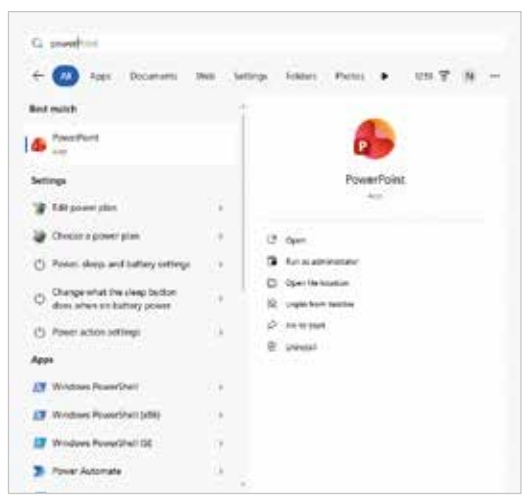
The main productivity apps – Word, Excel, and PowerPoint – are not preceded by "Microsoft" on the **Start** menu.



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

1. Click in the Search box on the Taskbar

2. Begin typing an app name; e.g. powerpoint



3. Click the **PowerPoint** desktop app entry to launch the PowerPoint app

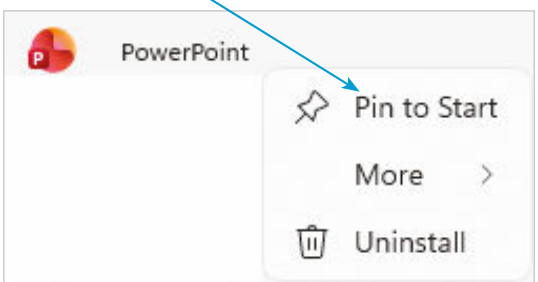
You can also right-click an app in your search results to choose **Pin to Start** (or choose **Pin to taskbar**) for faster access.

Repeat the process for pinning apps for each Microsoft 365 app, as required.

For even quicker access to the Microsoft 365 apps, add icons to the **Start** menu:

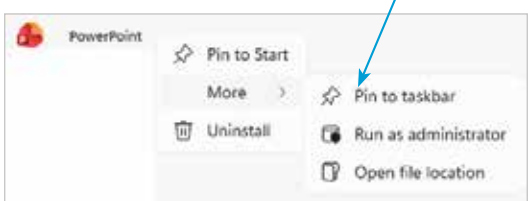
1. Locate a Microsoft 365 app, such as PowerPoint, as described on the previous page

2. Right-click the app entry and select **Pin to Start**



You can place icons on the Taskbar for apps you use most frequently. To do this:

1. Right-click the app entry and click on **More** > **Pin to taskbar**



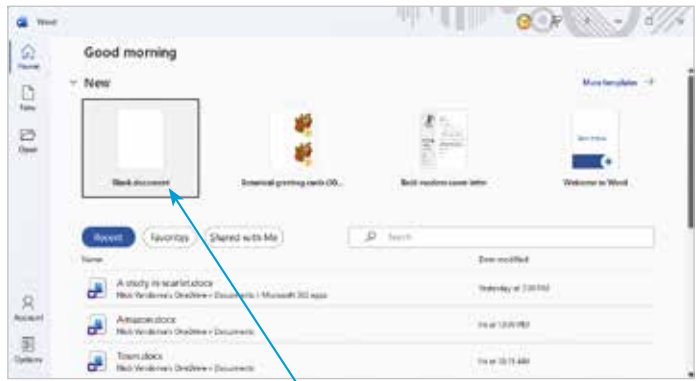
2. Repeat this procedure for any other frequently used Microsoft 365 apps. Your frequently used apps will now be available by simply clicking an icon on the Taskbar

If you have a microphone enabled on your system, you can command Copilot to launch an app by saying, for example, "Hey Copilot. Start PowerPoint".

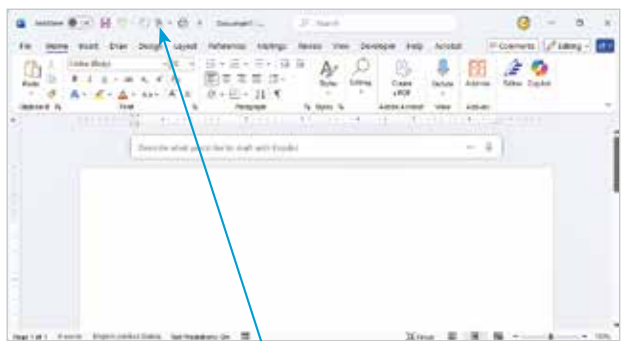
App Start Screen

The main productivity apps (Word, Excel, and PowerPoint) open at the **Start screen** with the **Recent** list and various document templates.

1 Select an app, such as Word, to display that app's **Start screen**

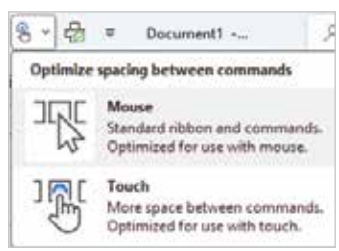


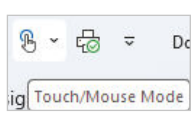
2 Select **Blank document** to begin a new editing session with an empty document



The **Touch/Mouse Mode** button appears by default when you have a touch-enabled monitor. To add it if it is 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.

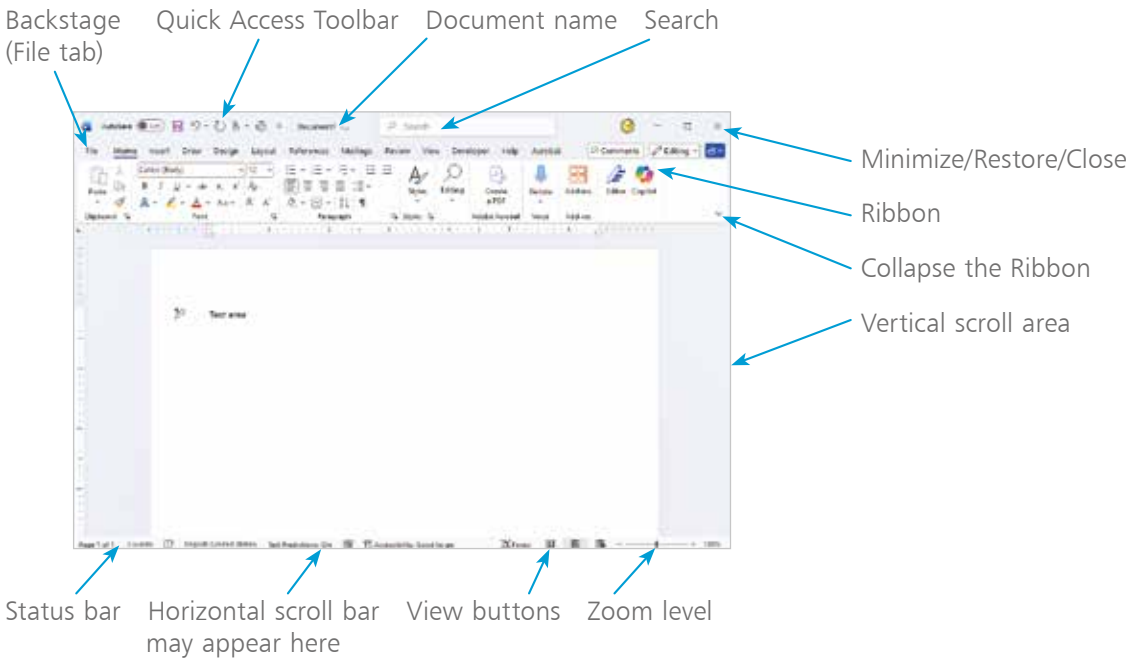
3 Click the **Touch/Mouse Mode** button on the **Quick Access Toolbar** (see page 32), and then select **Mouse** or **Touch**, as required. This determines the input device to be used



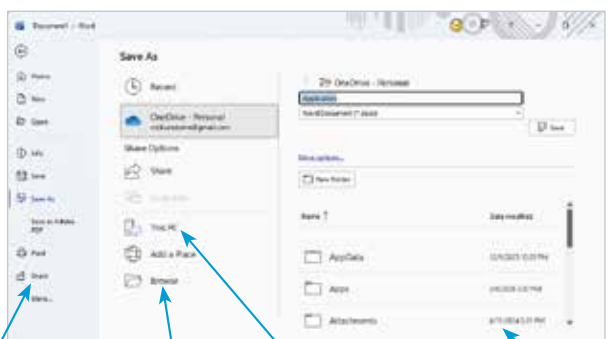


The App Window

When you start an app such as Word, Excel or PowerPoint, the app window is displayed with a blank document named **Document1**, **Book1** or **Presentation1** respectively. Using Word as an example, parts of the app window include:



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 27) or on your computer.



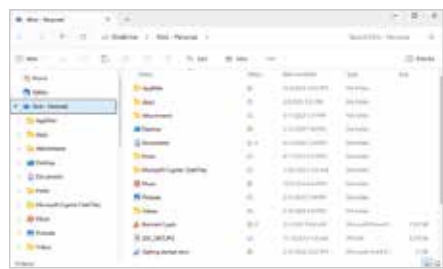
From **Backstage** you can select **Info** for details about your document, **New** to start another document or **Open** to display an existing document. There are also printing and sharing options provided.

Using OneDrive

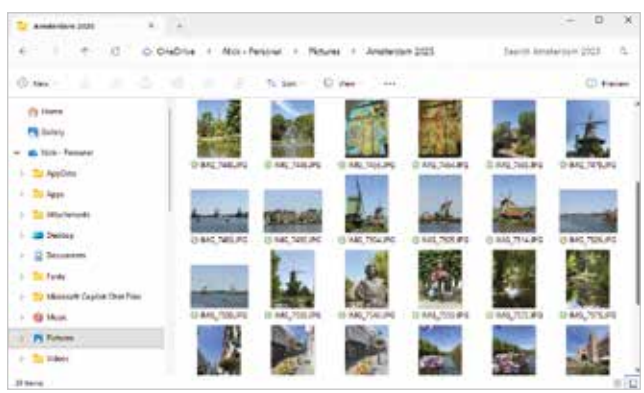
Cloud computing is now a mainstream part of our online experience. This involves saving content to an online server connected to the service that you are using – i.e. through your Microsoft Account. You can then access this content from any computer or mobile device using your account login details, and also share it with other people by giving them access to your cloud service. It can also be used to back up your files, in case they get corrupted or damaged on your computer.

The cloud service with Windows 11, and also part of Microsoft 365, is known as OneDrive, and you can use it with a Microsoft Account. It consists of the OneDrive folder in File Explorer, the OneDrive app, and the online OneDrive website. Content added to any of the elements will be available in the others. To use them:

1 Click on the **[Your name] - Personal** folder in File Explorer to view its contents. Alternatively, click on this button on the **Start** menu



2 The contents of your OneDrive folder are displayed in File Explorer



OneDrive has a **Personal Vault** folder that has added levels of security for storing your most sensitive and important documents and photos. It requires an extra level of security to access the Personal Vault; e.g. a PIN code or a code that is sent to you via email or text message. The Personal Vault can be accessed from any of the OneDrive interfaces.

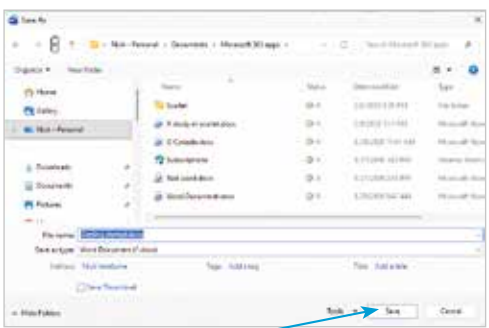
Your OneDrive folder can be pinned to the **Quick access** section in File Explorer. To do this, right-click on the **OneDrive** icon in File Explorer and click on **Pin to Quick access**.

Your OneDrive

Microsoft 365 documents on your computer can be saved to your OneDrive online storage, and, in many cases, this is the default option when saving documents. To do this:

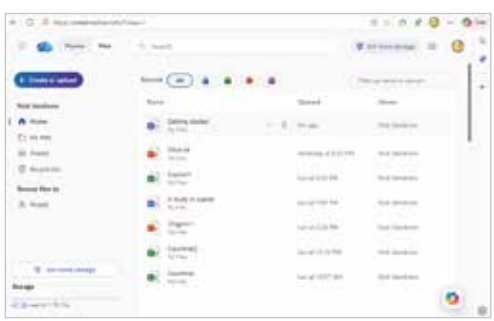
1. Select **File** > **Save a Copy**, then click the **OneDrive - Personal** button

2. Confirm or amend the document name, then choose an appropriate folder



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



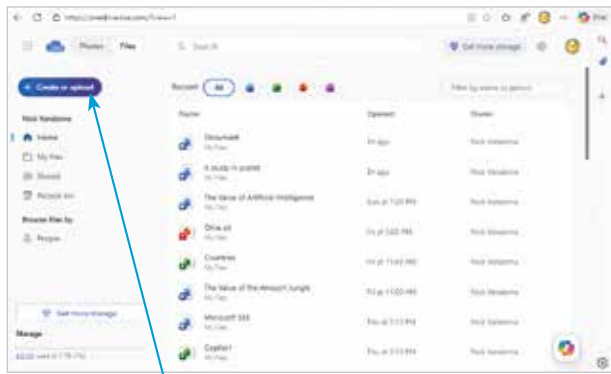
By default, you get 5GB of free OneDrive storage space with Windows 11. This is an excellent way to back up your important documents, since they are stored away from your computer. A Microsoft 365 subscription gives you a further 1TB of storage (correct at the time of printing).

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.

OneDrive Online

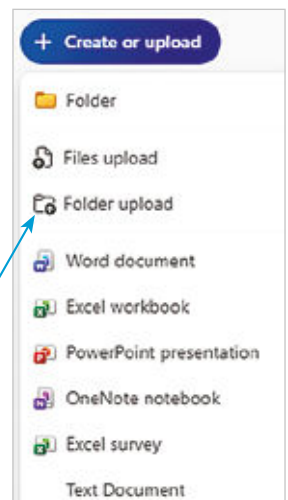
To view the contents of your OneDrive folder online, go to the website at **onedrive.live.com** and sign in with your Microsoft Account details, as shown in Step 4 on page 27.

1 Your OneDrive content is the same as in your OneDrive folder on your computer and in the OneDrive app

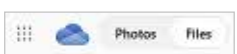


If items are added to one version of OneDrive – e.g. the OneDrive app – they will also be available in other versions too – e.g. the online version.

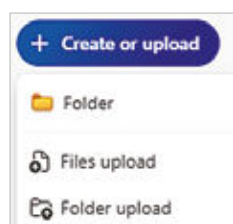
2 Click on the **Create or upload** button to add more content to OneDrive online, which will be also available in your OneDrive on your computer



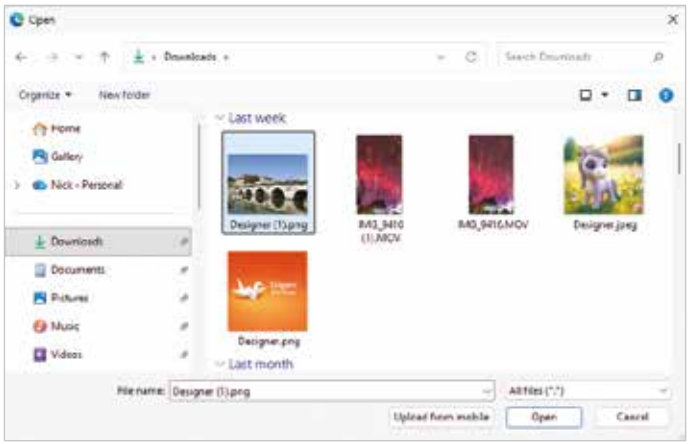
Use the **Photos** and **Files** options, at the top left-hand side of the OneDrive window in Step 1, to view content relating to these categories.



3 Click on either the **Files upload** or **Folder upload** option to add files from your own computer

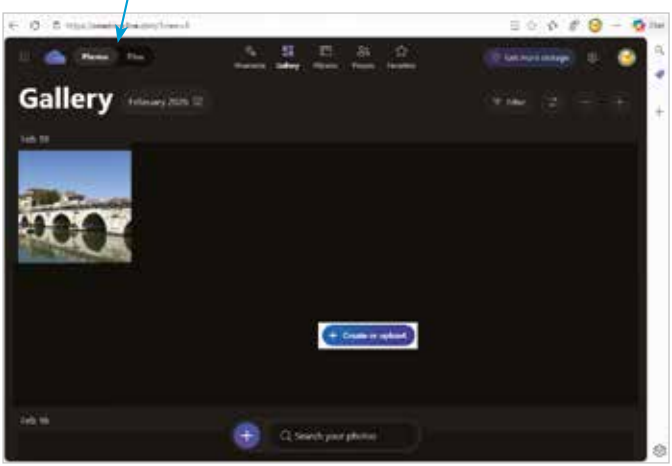


4 Select files as required, provided that they are not already in your OneDrive, and click on the **Open** button

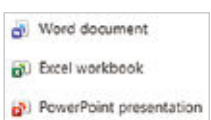


By default, local copies of your OneDrive files will be stored in your personal folder on your hard drive, though you can change the location during setup.

5 The uploaded item is placed with the relevant category within OneDrive – i.e. **Photos** or **Files**.
Click here to view the different folders



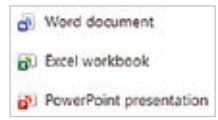
6 Click on one of the main productivity options in Step 2 on the previous page to create content with these apps in OneDrive – see page 30



…cont'd

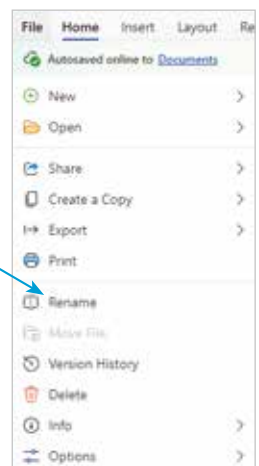
If you have a Microsoft Account and associated OneDrive, you can use the Microsoft 365 online apps to create or access your documents from a browser, and share files and collaborate with other users online. To create a Word, Excel or PowerPoint document in OneDrive online:

1. Click on the **Create or upload** button as shown on page 28, and click on one of the productivity options; e.g. **Word document**, **Excel workbook** or **PowerPoint presentation**



2. A new blank document is opened for the selection (in this example, a Word document). Add content in the same way as for using the same app on your computer

3. Click on the **File** tab on the Ribbon to view the available menu options. This is a different interface from the one used if Word, Excel or PowerPoint is used on a Windows 11 computer. Click on the **Rename** option to change the default name of the document. The new document will also be available in the OneDrive folder in File Explorer on your computer



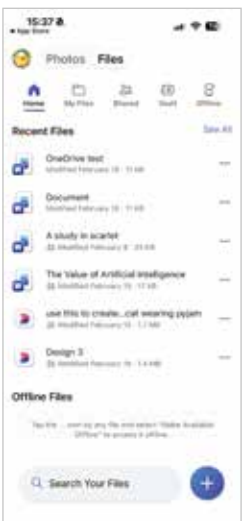
Click on the **Share** button in the top right-hand corner of the window in Step 2 to access options for sharing the document. Click on the **Share** option on the menu to access a dialog window for emailing a link to an email recipient.

OneDrive App

The OneDrive app can be used on a computer, once it has been downloaded from the Microsoft Store. However, since OneDrive can be accessed directly through File Explorer, the need to use the app on a computer is reduced. Where it really comes into its own is when it is downloaded and used on a mobile device, such as a smartphone, so that you can always access content in your OneDrive wherever you are. To use the OneDrive app on a mobile device:

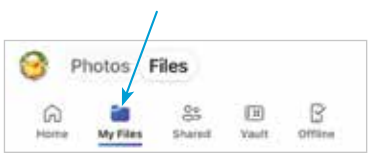
1. Access and download the OneDrive app from the app store linked to your mobile device; e.g. the Apple App Store or the Google Play Store

2. The OneDrive app will display all content from your computer that has been synced with OneDrive, opening at the **Home** section



3. Click on the **+** button to add more content to the app, which will be available in your OneDrive on your computer

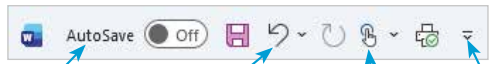
4. Use the tabs at the top of the window to navigate through the OneDrive app. Tap on the **My Files** option to access all of the available folders and open specific items, such as an image



The **Photos** option at the top of the Home window can be used to view all of the photos in OneDrive, in addition to accessing them through the **My Files** option in Step 4.

Quick Access Toolbar

The **Quick Access Toolbar**, above the Ribbon, contains a set of commands that are independent of the selected tab.



AutoSave/Save | Undo/Repeat last command | Touch/Mouse Mode | Customize Quick Access Toolbar

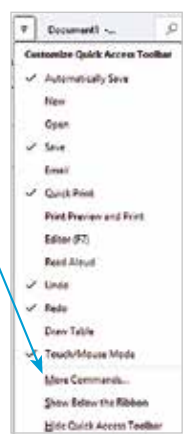
1. Click the **Save** button to save the current contents of the document to your OneDrive or to the drive on your PC

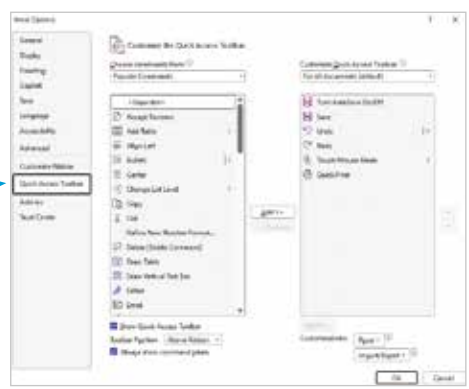
2. Click **Repeat** to carry out the last action again or click **Undo** to reverse the last action, and click again to reverse the previous actions in turn

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 a shortlist of frequently referenced commands

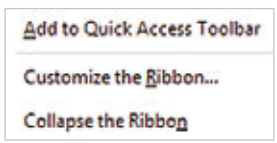
5. Click **More Commands...** to display a full list of commands, then add and remove entries as desired





Hot tip

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



Hot tip

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

Don't forget

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

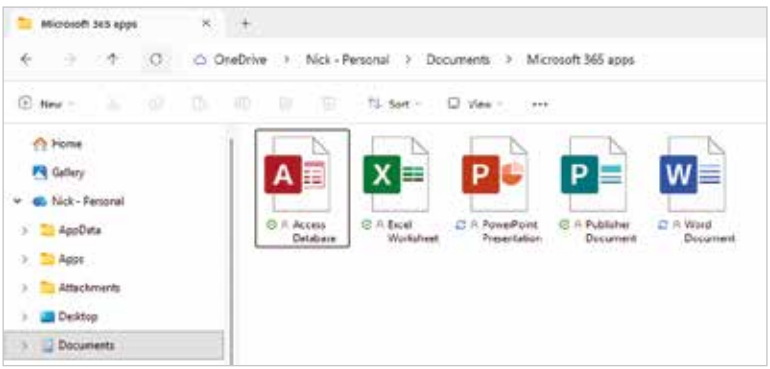
Document Types

Files you create using the apps will be Microsoft 365 documents of various types, including:

- **Word document** – formatted text and graphics.
- **Excel worksheet** – spreadsheets and data lists.
- **PowerPoint presentation** – presentations and slide shows.

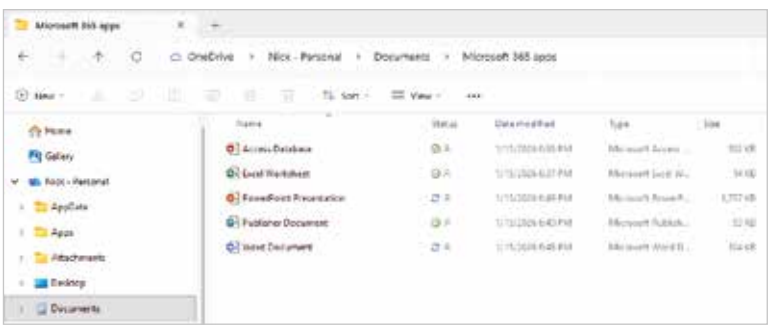
Each item will be a separate file. Typically, these may be saved in your OneDrive **Documents** folder (or locally on your computer).

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



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

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

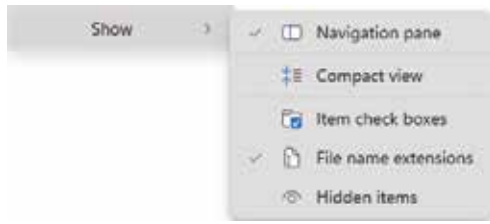


Right-click the header line for **Details**, and you can select other file attributes such as **Date created**, **Authors**, **Title**, etc.

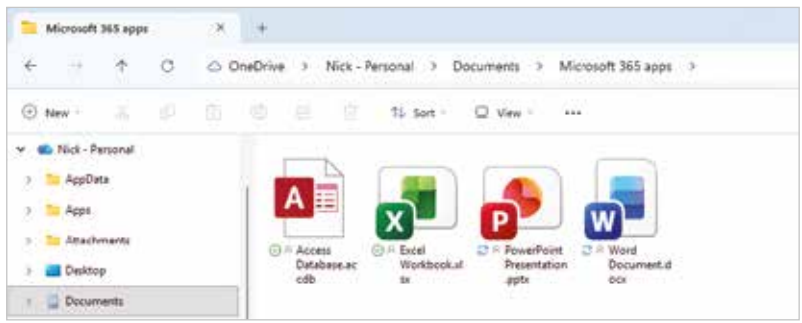
File Extensions

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

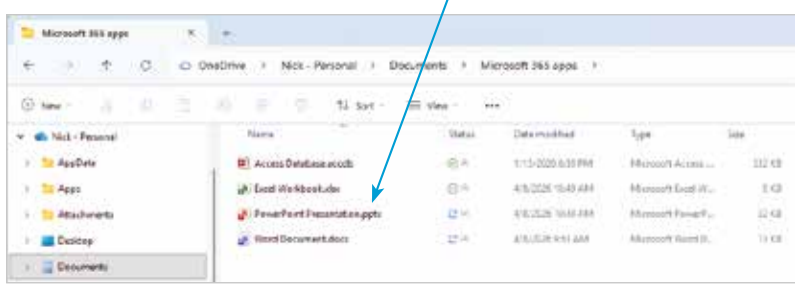
1. In File Explorer, select the **View** tab, and in the **Show/Hide** section of the Ribbon, click the box labeled **File name extensions**. Select **Hidden items** also, if you want to check if there are any hidden files in your folder



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

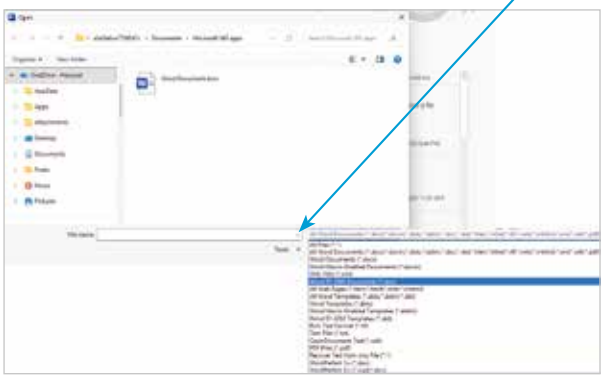


Files saved in Microsoft 365 use OpenXML formats and extensions; for example, **.docx** and **.xlsx**. Older Office files will have file types such as **.doc** and **.xls**.

Compatibility Mode

Microsoft 365 will open documents created in previous versions of apps; for example **.doc** (Word) or **.xls** (Excel).

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



2. Choose a document type (**Word 97-2003**, for example) and select a file (e.g. **Microsoft 365.doc**)

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

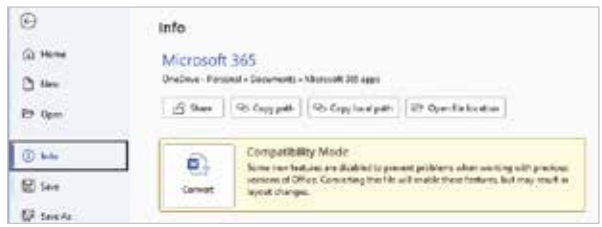
You may need to save documents in Compatibility Mode, as some users you wish to share files with may not have the latest version of Microsoft 365.

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

Convert to the latest format

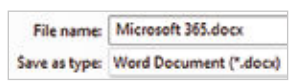
If you have opened a document in Compatibility Mode, you can convert it to the latest Microsoft 365 format.

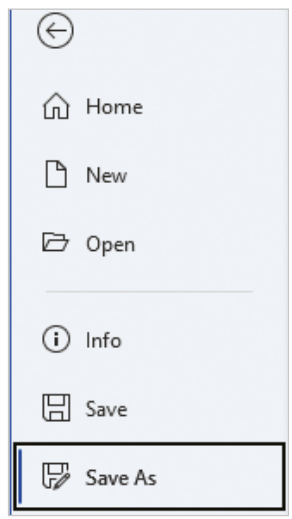
1 Select the **File** tab and **Info**, then click the **Convert** button



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

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





4 To retain the original while creating a new file in the latest Microsoft 365 format, you'd select **File**, **Save As**, and then click the **Save** button

You can also click the **File** tab, select **Save As**, and choose the standard Microsoft 365 format (e.g. Word Document) to carry out the conversion.

Converting will create a file of the same name, but with the latest Microsoft 365 format extension.

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