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Microsoft Office Inside **OUT**

(Office 2021 and Microsoft 365)

Joe Habraken

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(Office 2021 and Microsoft 365)

Joe Habraken

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Contents at a Glance

Part I Getting started with the Microsoft 365 apps

Chapter 1	
Getting oriented to the Microsoft 365 applications	3
Chapter 2	
Navigating and customizing the 365 interface	19
Chapter 3	
Managing and sharing 365 files	49
Chapter 4	
Using and creating graphics	69
Chapter 5	
Using the 365 Online apps	97

Part II Word

Chapter 6	
Essential Word features	125
Chapter 7	
Enhancing Word documents	161
Chapter 8	
Working with tables, columns, and sections	209
Chapter 9	
Managing mailings and forms	231
Chapter 10	
Creating special documents	257

Part III Excel

Chapter 11	
Essential Excel features	297
Chapter 12	
Worksheet formatting and management	345
Chapter 13	
Getting the most from formulas and functions ...	383
Chapter 14	
Enhancing worksheets with charts	423
Chapter 15	
Using Excel tables and pivot tables	461
Chapter 16	
Validating and analyzing worksheet data	503

Part IV PowerPoint

Chapter 17	
Essential PowerPoint features	529
Chapter 18	
Advanced presentation formatting, themes, and masters	555
Chapter 19	
Better slides with pictures, objects, and SmartArt	585
Chapter 20	
Enhancing slides with animation, transitions, and multimedia	611
Chapter 21	
Delivering a presentation and creating support materials	641

Part V Outlook

Chapter 22	
Outlook configuration and essential features ...	669
Chapter 23	
Managing email in Outlook	701
Chapter 24	
Using the calendar for appointments and tasks ...	739
Chapter 25	
Working with contacts and planning meetings ..	769
Chapter 26	
Securing and maintaining Outlook	797

Part VI Publisher

Chapter 27	
Essential Publisher features	829
Chapter 28	
Advanced Publisher features	861

Part VII Appendixes

Appendix A	
Microsoft 365 application integration	887
Appendix B	
Microsoft 365 macros	903
Index	923



Table of Contents

Acknowledgments.....	xxiii
About the Author.....	xxiv
Introduction.....	xxv
Who this book is for.....	xxv
Assumptions about you.....	xxv
How this book is organized.....	xxvi
Errata, updates & book support.....	xxvii

Part I Getting started with the Microsoft 365 apps

Chapter 1	Getting oriented to the Microsoft 365 applications.....	3
	Introducing Microsoft 365.....	3
	New features and tools in Microsoft 365.....	8
	Collaborating in the cloud.....	8
	Collaborating with Microsoft Teams.....	9
	Other 365 improvements and updates.....	10
	The 365 suite applications.....	12
	The different versions of the 365 app suite.....	12
	Hardware and software requirements for 365.....	14
	Installing Microsoft 365.....	15
	Getting Help in the 365 applications.....	16
Chapter 2	Navigating and customizing the 365 interface.....	19
	Getting familiar with the 365 interface.....	19
	Galleries.....	20
	Contextual tabs.....	21
	Overview of the 365 application window.....	22
	Navigating the 365 applications.....	24
	Working with the ribbon.....	25
	Working in the Backstage.....	28
	Customizing an application interface.....	31
	Customizing the ribbon.....	32
	Customizing the Quick Access Toolbar.....	35
	Customizing the status bar.....	37
	Configuring application options.....	38
	Advanced Options settings.....	40
	Add-ins.....	41
	Using Application add-ins.....	42

	Using the Trust Center	43
	Trusted publishers	45
	Trusted locations	46
Chapter 3	Managing and sharing 365 files	49
	Understanding 365 file formats	49
	Saving files as different file types	52
	Converting files to different file types	53
	Configuring save file options	55
	Creating and managing files	56
	Managing files	59
	Creating a new folder	60
	Creating a new library	61
	Viewing file versions in an application	62
	Searching for 365 files	63
	Protecting a 365 file	65
	Preparing a file for sharing	67
Chapter 4	Using and creating graphics	69
	The 365 options for graphics and pictures	69
	Working with SmartArt graphics	74
	Inserting SmartArt graphics	76
	Modifying SmartArt graphics	79
	Working with your digital pictures	81
	Inserting pictures	82
	Adjusting pictures	83
	Cropping an image	86
	Using the Background Removal tool	86
	Using shapes and the 365 drawing tools	88
	Adding and combining multiple shapes	89
	Using the Shape Format tools	91
	Using the screenshot tool	93
	Using WordArt	94
Chapter 5	Using the 365 Online apps	97
	What the Online apps can do	97
	Where the Online apps live	99
	Saving Online application files to the cloud	101
	Saving a file to OneDrive or OneDrive for Business	103
	Sharing a file saved to the cloud	104
	Using the Word Online app	106
	The Word Online app's File tab	107
	The Word Online app's Home tab	109
	The Word Online app's Insert tab	110
	The Word Online app's Review tab	111
	The Word Online app's View tab	112

Using Excel Online	112
The Excel Online app's File tab	113
Working in the Excel Online app	114
Inserting functions and charts in the Excel Online app	115
Using PowerPoint Online	117
Working with slides	119
Adding pictures and SmartArt	120

Part II **Word**

Chapter 6 **Essential Word features..... 125**

Introducing Word	125
The Word interface	125
New features and improvements	127
Options for creating a new Word document	129
Using templates	132
Creating a template	134
Attaching a template	136
Navigating a Word document	137
Moving around a document with the mouse	138
Moving around a document with the keyboard	139
Selecting text	140
Understanding document formatting	140
Character formatting versus paragraph formatting	141
Manual formatting versus styles and themes	142
Working with fonts and text formatting	142
Formatting text	143
Working with paragraph formatting	146
Setting paragraph alignment	147
Changing line spacing	148
Setting line and page breaks	150
Setting indents	151
Working with tabs	152
Page layout: margins and page options	155
Changing margins	155
Changing page orientation and paper size	156
Inserting page breaks	157
Printing documents	157

Chapter 7 **Enhancing Word documents..... 161**

Creating better documents	161
Creating bulleted and numbered lists	162
Bulleted lists	162
Numbered lists	164
Multilevel lists	165
Working with borders and shading	166
Formatting with themes	168

- Creating headers and footers 172
 - Inserting headers and footers 174
 - The header and footer tools 175
 - Working with page numbering 178
- Inserting pictures and charts 179
 - Inserting pictures 180
 - Inserting stock images and online pictures 182
 - Inserting a chart 184
 - Integrating text and images 186
- Changing the document display 187
 - Using the navigation pane 189
 - Using the Outline view 190
 - Splitting the document window 192
- Using the Editor 192
 - Running the Editor 193
 - Using the Thesaurus 195
 - Using the Search feature 195
- Working with Quick Parts 196
 - Creating and inserting an AutoText entry 196
 - Creating and inserting building blocks 197
- Configuring AutoCorrect 199
- Understanding styles 200
 - Using the Styles gallery 201
 - Creating styles 202
 - Editing styles 203
 - Managing styles 204

Chapter 8 Working with tables, columns, and sections 209

- Options for adding a table 209
 - Inserting a table 211
 - Drawing a table 213
 - Converting text to a table 214
 - Entering and deleting text and navigating a table 214
 - Selecting and positioning a table 215
- Formatting tables 216
 - Adjusting columns and rows 217
 - Formatting cells 219
 - Using table styles 220
- Sorting table data 224
- Using formulas in tables 225
- Adding columns to a document 226
- Understanding sections 228
 - Adding and removing section breaks 228
 - Formatting page attributes in a section 230

Chapter 9 Managing mailings and forms 231

- Options for mail-related documents 231
- Creating an envelope 232
- Creating a label or labels 234

Understanding mass mailings	236
Performing a mail merge	236
Using the mail merge commands	238
Understanding recipient lists	240
Creating a recipient list	241
Editing and manipulating a recipient list	243
Using merge fields	245
Using merge rules	248
Previewing merge results	249
Completing the merge	250
Creating merged envelopes and labels	251
Understanding Word fields	252
Building a form with form controls	254
Chapter 10 Creating special documents	257
Options for large documents	257
Creating a table of contents	258
Creating a table of contents with built-in styles	259
Creating a table of contents with your own styles	261
Adding entries and updating the TOC	263
Building a TOC with field codes	264
Working with captions and tables of figures	266
Inserting a caption	266
Inserting a table of figures	267
Using cross-references	269
Generating an index	271
Marking index entries	271
Inserting the index	272
Working with citations and bibliographies	274
Creating citations	274
Managing citations	276
Inserting the bibliography	277
Inserting footnotes and endnotes	278
Tracking document changes	280
Options for viewing changes	283
Reviewing changes	284
Comparing documents	285
Building a better “big” document	287
Creating bookmarks	288
Inserting comments	289
Creating a master document	290
Working in Outline view	290
Creating subdocuments from scratch	292
Inserting existing document files into a master document outline	293
Manipulating the master document	294

Part III Excel

Chapter 11	Essential Excel features	297
	Introducing Excel	297
	Navigating the Excel workspace	299
	The Excel ribbon	300
	Moving around a worksheet	302
	Creating workbooks and worksheets	303
	Using Office.com templates	304
	Inserting and rearranging worksheets	306
	Managing Excel workbooks	307
	Protecting workbooks and worksheets	310
	Locking cells	311
	Specifying edit ranges	313
	Preparing a workbook for sharing	315
	Recovering unsaved workbooks	317
	Entering data in a worksheet	317
	Entering labels	318
	Entering values	319
	Using AutoComplete	320
	Filling and entering series	321
	Copying, moving, and deleting cell contents	327
	Using the Paste Special dialog box	329
	Moving cells and ranges	331
	Clearing and deleting cells	332
	Editing cell content	333
	Viewing worksheets	334
	Printing worksheets	336
	Using the Page Layout commands	337
	Setting a print area	339
	Inserting page breaks	339
	Setting print titles	340
	Working on the print page	340
	Inserting headers and footers	342
Chapter 12	Worksheet formatting and management	345
	Formatting text entries	345
	Accessing the Format Cells dialog box	346
	Changing text orientation	348
	Formatting values	349
	Using the Format Cells dialog box	351
	Creating custom number formats	352
	Adding comments and notes to cells	354
	Inserting a Comment	354
	Viewing and deleting comments	355
	Inserting and deleting notes	356
	Using themes	357

Formatting cells using borders and color	357
Adding cell borders	358
Using background colors	360
Using cell styles and the Format Painter	360
Creating a cell style	361
Using the Format Painter	362
Using conditional formatting	363
Using highlight cell rules	364
Using top/bottom rules	365
Using data bars	365
Using color scales	366
Using icon sets	367
Creating and copying conditional formatting rules	367
Manipulating cells and cell content	369
Inserting cells	369
Merging cells and wrapping text	370
Finding and replacing cell items	371
Working with columns and rows	373
Changing column width and row height	373
Inserting columns and rows	374
Deleting columns and rows	375
Hiding columns and rows	375
Working with worksheets	375
Freezing rows and columns	375
Splitting worksheets	377
Hiding worksheets	377
Naming ranges	378
Creating range names from selections	379
Managing range names	380
Adding images and graphics to worksheets	381
Chapter 13 Getting the most from formulas and functions	383
Performing calculations in Excel worksheets	383
Relative versus absolute referencing	385
Creating and editing formulas	389
Understanding operator precedence	390
Entering formulas	391
Editing formulas	391
Working with Excel functions	392
Entering a function in a cell	393
Using AutoSum	394
Using the status bar statistical functions	395
Using the Insert Function dialog box	396
Using the Function Library	397
Using range names in formulas and functions	399
Inserting a range name into a formula	400
Inserting a range name into a function	401
Referencing cells or ranges on other worksheets	402

Copying and moving formulas and functions	404
Choosing the right function	405
Financial functions	405
Logical functions	407
Statistical functions	409
Lookup & Reference functions	410
Date & Time functions	414
Text functions	414
Other function categories	416
Proofing your formulas and functions	417
Common error messages	417
Using the auditing tools	419
Using the Watch Window	420
Chapter 14 Enhancing worksheets with charts	423
Understanding Excel charts	423
Chart terminology	424
Using different chart types	427
Creating charts	435
Inserting a chart from the ribbon	436
Selecting a recommended chart	437
Inserting charts with the Quick Analysis gallery	438
Tools for quickly customizing a chart	439
Moving, copying, or deleting a chart	440
Modifying a chart	441
Changing chart type or chart data	441
Selecting chart layouts and styles	443
Working with chart elements	444
Modifying titles and data labels	447
Working with the legend and data points	447
Manipulating axes and gridlines	449
Adding trendlines, drop lines, and bars to a chart	450
Creating a combination chart	454
Working with a pie of pie chart	455
Creating a custom combination chart	455
Using sparklines	457
Creating sparklines	457
Modifying sparklines	459
Chapter 15 Using Excel tables and pivot tables	461
Excel and databases	461
Defining a table range	463
Creating a table using styles	464
Using the Table Design Tools	465
Sorting table data	467
How Excel sorts data	468
Using the Sort dialog box	468

Filtering table data	470
Using the AutoFilter Search box	471
Creating custom AutoFilters	471
Filtering tables with slicers	474
Creating advanced filters	475
Creating custom sheet views	478
Using the data form	479
Creating outlines and subtotals	480
Working with external data	484
Importing data from Access	484
Importing a web table	486
Importing text files	486
Connecting to other data sources	488
Using Microsoft Query	490
Viewing and refreshing connections	493
Working with pivot tables	494
Using the Recommended PivotTables command	496
Creating a pivot table	497
Working with the pivot table tools	500
Using slicers	502
Chapter 16 Validating and analyzing worksheet data	503
Taking advantage of data validation	503
Specifying validation criteria	504
Configuring input messages and error alerts	506
Circling invalid data	508
Performing a what-if analysis	510
Creating a data table	511
Creating scenarios	513
Viewing scenarios and creating reports	516
Using Goal Seek, Solver, and Forecast Sheet	518
Working with Goal Seek	518
Working with Solver	519
Creating a Forecast Sheet	523
Part IV PowerPoint	
Chapter 17 Essential PowerPoint features	529
PowerPoint	529
Options for creating a new presentation	530
Using templates	532
Using a theme to create a new presentation	535
Creating a presentation from an existing presentation	535
Inserting slides from the Reuse Slides task pane	536
Creating a template	537
Inserting new slides	540
Entering text	541
Inserting slides from a Word outline	542
Inserting other object content	542

	Modifying a slide's layout	543
	Working with slides in different views	543
	Zooming in and out	545
	Rulers, gridlines, and guides	546
	Color/grayscale commands	547
	Opening a new presentation window	548
	Rearranging and deleting slides	549
	Modifying bulleted lists	549
	Using numbered lists	551
	Viewing a presentation during editing	552
Chapter 18	Advanced presentation formatting, themes, and masters	555
	Working with text boxes and formatting	555
	Inserting a text box	556
	Basic text formatting	557
	Formatting a text box with the Shape Format tools	559
	Selecting quick styles and shape attributes	559
	Shape fill, outline, and effects	559
	Using WordArt styles and text settings	563
	Arranging text in tables	566
	Inserting a table on an existing slide	566
	Formatting a table	567
	Table layout commands	567
	Working with themes	570
	Applying themes	571
	Applying theme variants	571
	Creating a custom theme	575
	Using headers and footers	576
	Understanding masters	577
	Altering and creating master slides	579
	Creating layout masters	581
	Using slide sections	582
Chapter 19	Better slides with pictures, objects, and SmartArt	585
	Using graphics to enhance slides	585
	Inserting a picture	587
	Adding stock images to slides	589
	Creating a photo album	591
	Adjusting picture settings	592
	Configuring album layout settings	592
	Working with shapes	593
	Inserting icons	595
	Using SmartArt graphics	596
	Inserting a SmartArt graphic	599
	Converting text to a SmartArt graphic	600
	Using the SmartArt tools	600
	Adding charts to slides	602
	Inserting a chart onto a slide	602
	Modifying and formatting a chart	604

Working with slide objects	606
Grouping objects	607
Layering objects	607
Adding hyperlinks to slides	608
Using PowerPoint Designer	609
Chapter 20 Enhancing slides with animation, transitions, and multimedia	611
Animations versus transitions	611
Assigning animation to a slide object	614
Accessing additional animation effects	615
Using motion paths	616
Applying a motion path	617
Editing a motion path	618
Creating a custom motion path	621
Advanced animation techniques	622
Changing effect options	623
Adding additional animations	624
Using the animation painter	625
Including sound effects with animations	625
Setting timings for animations	627
Managing slide animations	628
Adding transitions to slides	630
Modifying transitions	631
Using the Morph transition	632
Adding sound to a slide	634
Editing sound options	635
The trim audio dialog box	636
Adding video to a slide	636
Inserting online video	636
Inserting a video file	639
Modifying your video clips	640
Chapter 21 Delivering a presentation and creating support materials	641
Planning your presentation	641
Checking the presentation for spelling and grammar errors	642
Running through a completed presentation	644
Using the presenter coach	645
Using the presenter view	646
Using hidden slides	648
Creating a custom slide show	649
Creating a self-running presentation	652
Setting up a slideshow	652
Rehearsing timings	654
Recording a slideshow	654
Creating an interactive presentation	656
Working with the notes and handout masters	659
Setting handout master options	659
Setting notes master options	661

Printing presentations, notes, and handouts	661
Exporting a presentation	663
Sharing your presentation	665

Part V Outlook

Chapter 22 Outlook configuration and essential features.....669

Introducing Outlook	669
Outlook and email accounts	670
Exchange ActiveSync	671
Outlook.com email	672
Internet email	672
Configuring Outlook at first start	673
Adding email accounts to Outlook	674
Understanding Outlook profiles	677
Creating a new profile	678
Managing profiles	679
Loading profiles	681
Understanding Outlook data files	681
Configuring Outlook for Microsoft Exchange Server	682
Creating personal folders files	684
Repairing Outlook data files	685
Importing and exporting data	687
Importing data	687
Exporting data	689
Navigating the Outlook workspace	689
Accessing Outlook items using the Navigation bar	691
Working with views in Outlook	692
Categorizing Outlook items	695
Searching for Outlook items	696
Using Advanced Find	697
Using search folders	697
Printing Outlook items	698

Chapter 23 Managing email in Outlook.....701

Working in the Outlook window	701
Creating an email message	704
Using the Outlook Address Book	706
Setting message options	708
Specifying email format	708
Setting message flags, importance, and sensitivity	709
Configuring voting buttons, receipts, and delivery options	711
The Message Properties dialog box	713
Attaching files and items to a message	715
Attaching a business card	716
Attaching a calendar	717
Using themes and email stationery	718
Adding a signature	719

Sending mail	720
Recalling a message	720
Working with received email	721
Organizing messages in the Inbox	722
Showing messages as conversations	723
Filtering email	724
Managing email	724
Using Quick Steps	725
Answering a message	727
Forwarding a message	728
Saving an attachment	728
Translating messages	729
Deleting messages	729
Printing mail	731
Moving email	731
Managing email accounts	732
Editing email account settings	734
Adding an email account automatically	735
Adding a mail account manually	735
Setting Outlook mail options	736
Chapter 24 Using the calendar for appointments and tasks	739
Navigating the calendar	739
Changing the calendar view	741
Change the time scale and time zone	742
Scheduling an appointment	743
Scheduling a recurring appointment	745
Scheduling an event	746
Editing and managing appointments	747
Searching the calendar	748
Sharing calendars	750
Creating a calendar share invitation	750
Opening a shared calendar	752
Viewing multiple calendars	752
Emailing calendar items	754
Emailing a calendar	754
Publishing a calendar online	755
Setting calendar options	757
Working with tasks	758
Using the Tasks folder	760
Creating a new task from the Tasks folder	761
Creating a recurring task	761
Assigning and accepting tasks	762
Viewing and managing tasks	763
Managing tasks	766
Setting Tasks options	767

Chapter 25	Working with contacts and planning meetings	769
	Navigating the Contacts list	769
	Creating a new contact	772
	Entering contact details	774
	Adding fields for a contact	775
	Editing contact information	776
	Editing a business card	777
	Tagging contacts with flags and categories	779
	Mapping a contact's address	780
	Searching the Contacts folder	780
	Organizing contacts with groups	781
	Forwarding and sharing contacts	782
	Forwarding contacts	783
	Sharing contacts	784
	Communicating with contacts	785
	Contact actions	787
	Printing contact information	788
	Setting contact options	788
	Scheduling meetings	789
	Selecting the meeting location	790
	Using the Scheduling Assistant	791
	Viewing and editing meeting information	792
	Responding to meeting requests	793
Chapter 26	Securing and maintaining Outlook	797
	Security overview	797
	Malware and antivirus software	798
	Strong password protection	799
	Configuring Outlook security settings	801
	Encrypting email and using digital signatures	804
	Options for encrypting email	805
	Digitally signing emails	806
	The perils of HTML email	806
	Dealing with message attachments	807
	Coping with junk email	810
	Working with the junk email commands	810
	Setting junk email options	812
	Creating email rules	813
	Creating a quick rule for a specific sender	814
	Creating complex rules	815
	The Rules Wizard	816
	Managing rules	818
	Archiving Outlook items	819
	Configuring AutoArchive settings	820
	Setting AutoArchive options for a folder	821
	Archiving manually	822
	Configuring an autoreply message	824

Part VI Publisher

Chapter 27	Essential Publisher features	829
	Introducing Publisher	829
	Planning your publication	830
	Working with publication templates	831
	Creating a new publication	833
	Using a template	833
	Using blank sizes	834
	Creating a new template	835
	Navigating the Publisher workspace	836
	Using the rulers and guides	837
	Options for viewing the publication	840
	Creating a business information set	841
	Creating a new business information set	841
	Creating additional business information sets	842
	Working with text	843
	Editing text in a text box	844
	Creating your own text boxes	844
	Formatting text boxes	844
	Linking text boxes	849
	Inserting a text file	851
	Inserting illustrations	852
	Options for inserting pictures	852
	Formatting a picture	855
	Inserting clip art	856
	Inserting shapes	857
	Using building blocks	857
	Printing publications	858
Chapter 28	Advanced Publisher features	861
	Adding pages to a publication	861
	Configuring page settings	863
	Changing the current template	866
	Working with master pages	868
	Placing objects on the master page	869
	Inserting headers and footers	870
	Creating master pages	871
	Using tables in publications	872
	Table design commands	872
	Table layout commands	873
	Manipulating publication objects	874
	Grouping objects	875
	Layering objects	876
	Swapping images	876
	Merging data into a publication	877
	Performing a mail merge	877
	Performing a catalog merge	880

Fine-tuning your publications	882
The Spelling feature.....	882
Hyphenation	882
Design Checker.....	883

Part VII Appendixes

Appendix A Microsoft 365 application integration	887
Sharing application data	887
Understanding object linking and embedding.....	888
Choosing between linking and embedding.....	890
Linking objects	891
Linking with Paste Special	891
Linking with the Paste Options gallery.....	893
Linking using the Object command	894
Updating and breaking links.....	895
Editing linked objects	897
Embedding objects	898
Embedding with Paste Special	899
Embedding using the Object command.....	899
Embedding new objects.....	900
Editing embedded objects	901
Sharing data with Outlook using actions	901
Appendix B Microsoft 365 macros	903
Macros and Office	903
Adding the Developer tab to the ribbon.....	904
Enabling macros in the Trust Center.....	905
Creating macro-enabled Office files.....	907
Understanding macros.....	908
Creating a macro	910
Recording a macro.....	911
Assigning a macro button to the Quick Access Toolbar.....	912
Running macros	914
Editing recorded macros	914
Exploring the VBA Editor	915
Stepping through a macro	916
Digitally signing macros.....	917
Index.....	923

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About the Author

Joe Habraken is an educator, digital media and computer technology professional, best-selling author, and documentary filmmaker with more than 30 years of experience in the information technology and digital media production fields. He has written more than 40 books, which include numerous titles on the Microsoft Office application suite, computer networking, and Microsoft's Windows Server network platform. His titles have been translated into numerous languages and read around the world. Joe is currently an associate professor of Communication at the University of New England in Biddeford, Maine, where he teaches a variety of digital media, film, and hands-on software-related courses.

Introduction

Although I have worked with Microsoft Windows applications since 1989, it still amazes me that the Microsoft 365 application suite (formally known as Microsoft Office) continues to evolve and offer very thoughtful enhancements to these powerful software tools. The apps “get better” with each subsequent release, and this latest iteration of the apps is no different. This latest version of the suite, which includes Word, Excel, PowerPoint, Outlook, and Publisher offers new features as well as refinements of existing processes and commands.

Microsoft 365 has been the gold standard for consumer desktop applications for most of my professional life, and it continues to provide all the tools that you need for a wide variety of tasks whether you are a writer, accountant, sales representative, engineer, teacher, or pretty much anything else.

Many of the features and certainly the user interface provided by this latest version of 365 will be familiar to some of you, who have used these applications before. You will, however, also find that each interface has changed somewhat (with the introduction of Windows 11) and that each app has new tools and enhancements that make them even more effective and powerful software tools.

The challenge of writing a book like this one that covers a group of applications, rather than a single application, means that a balance must be struck in the coverage of each of the applications. I think you will find that this book not only provides a solid foundation for each of the 365 applications (Word, Excel, PowerPoint, Outlook, and Publisher) but also provides a depth of coverage that will serve any user of the Microsoft 365 suite.

Who this book is for

This book offers a well-rounded look at the features most people will use in the Microsoft 365 apps and serves as both a primer for new users of the applications as well as an excellent reference for seasoned users of Word, Excel, PowerPoint, Outlook, and Publisher. Also, this book also goes the extra mile and provides information that will be useful to advanced 365 users and the IT professionals who support them. Whatever level of 365 user you consider yourself, you will find that this book is written in an easy-to-read, conversational style that allows you to concentrate on learning and understanding. Although each of the Office applications provides multiple ways to tackle nearly every task, this book stresses best practices in using the applications of this powerful and sometimes complex software suite.

Assumptions about you

This book has been designed to get the Microsoft 365 novice up and running and to allow the experienced 365 user a chance to flex their application “muscles” to accomplish even more with the likes of Word, Excel, PowerPoint, and Outlook. Newcomers will find it an excellent hands-on

tool for learning the basics of the various Office applications. Those with more experience will find it a resource that enables them to go well beyond the basic capabilities of these powerful software applications. No matter what your experience level with the 365 apps, you will find that this book is a resource for learning how to best take advantage of the capabilities of the individual Office applications and also leverage the capabilities of Office as an integrated suite of software tools.

How this book is organized

This book is divided into six parts and also includes two appendixes. Each 365 application—Word, Excel, PowerPoint, Outlook, and Publisher—is discussed in detail in its own part or section. This book also includes an introductory section (Part I) that gets you up to speed with installing the 365 apps and discusses new features in the 365 application suite.

- Part I, “Getting started with the Microsoft 365 apps,” gets you oriented to the 365 application interface and geography and looks at improvements and new features in the applications. This section also discusses managing and sharing your application files and working with graphics and images in the applications. An introduction to the updated 365 Online apps is also provided.
- Part II, “Word,” takes an in-depth look at the Microsoft 365 suite’s powerful word processor and desktop publishing application. This section begins with an overview of the Word application environment and how to access essential Word features and tools. Subsequent chapters build your Word knowledge base, from commonly used features and commands to advanced subject matter that helps you create more complex and specialized Word documents using styles, tables, and sections. This section also provides complete coverage of advanced features, such as Word’s mail merge and forms, and it details approaches for creating larger documents that require a table of contents, footnotes, and cross-references.
- Part III, “Excel,” quickly orients you to this powerful spreadsheet application so that you can immediately begin to work with worksheets, text labels, values, formulas, and cell ranges. This section then focuses on worksheet management and advanced formatting and provides an in-depth discussion on Excel formulas and functions. Charts, pivot tables, and tools for sorting and filtering data are also covered in this section. This part culminates in coverage of Excel’s advanced features for validating and analyzing your worksheet data.
- Part IV, “PowerPoint,” provides a detailed discussion of this powerful presentation tool. This section, which begins with an overview of the PowerPoint application environment and basic presentation tools and concepts, gives you all the information you need to build complex and compelling PowerPoint presentations. Chapters in this section include information on how to build better PowerPoint slides using themes, slide transitions, and special animations. The options and best practices for presenting PowerPoint

presentations are also provided, with particular insight into how printed materials such as handouts and notes can make a presentation even more effective.

- Part V, “Outlook,” covers how to use this powerful information manager both at home and at work. This section provides an overview of the Outlook interface and essential features and then shifts from the general to the specific by concentrating on Outlook’s diverse capabilities. This coverage looks at Outlook’s different roles as an email client, contact information manager, calendar manager, and organizer of tasks, notes, and other personal information. This section concludes with information to help you secure your information in Outlook and protect your Outlook Inbox from spam, viruses, and other security threats.
- Part VI, “Publisher,” discusses the 365 suite’s dedicated desktop publishing application. Publisher has evolved over the last few years into a professional layout and desktop publishing tool that enables you to quickly create a variety of visually appealing and professional documents. This section orients you to the basics of creating special documents in Publisher and then builds your knowledge base in the application so that you can create more professional and complex items, including online content.

The book completes its discussion of the Office applications with Appendix A, “Microsoft 365 app integration,” and Appendix B, “Microsoft 365 macros,” which provide information on integrating the Office applications and Office macros, respectively. Each appendix is designed to give you additional information related to the Office applications that you can use to leverage your capabilities when using the Office suite applications.

Errata, updates & book support

We’ve made every effort to ensure the accuracy of this book and its companion content. You can access updates to this book—in the form of a list of submitted errata and their related corrections—at:

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Understanding 365 file formats 49

Configuring save file options 55

Creating and managing files 56

Searching for 365 files 63

Protecting a 365 file 65

Preparing a file for sharing 67

The Microsoft 365 applications provide you with all the tools you need to create documents, presentations, workbooks, and publications. After you create your various files using the 365 applications, it is up to you to manage your files and share them with colleagues and coworkers.

In this chapter, we take a look at the 365 file formats used in each of the Microsoft 365 applications. We also look at your options for managing and sharing files.

Understanding 365 file formats

The default file formats for each of the 365 applications (excluding Outlook) take advantage of the open XML (eXtensible Markup Language) file standards. The file formats benefit file compression, improved damage recovery, better detection of files containing macros, and better compatibility with other vendor software.

Although some backward-compatibility issues may be involved when you attempt to share a file using one of these file formats with a user who still works with an earlier version of a particular 365 application (think pre-2010 versions), most problems have been ironed out. Users still working with earlier versions of the applications can take advantage of various conversion utilities and software updates that enable them to convert or directly open a file using one of the new file formats.

You can also save your files in file formats that offer backward compatibility for coworkers still using older versions of the Microsoft (formerly Office) suite applications. And the applications (such as Word and Excel) provide you with compatibility-checking tools that help negate any issues with files shared with users of legacy Microsoft applications.

As already mentioned, Word, Excel, and PowerPoint use the open XML file formats by default when you save a file in these applications. And you have some other file format options in these applications if needed.

Publisher, on the other hand, saves publications by default in the .pub file type. The .pub file type is “directly” compatible with versions from Publisher 2003 through Publisher 2013. Although Publisher does not enable you to save a publication in the open XML file format (like Word and Excel), you can save Publisher files in the XPS file type, which is an XML file format for “electronic paper.” Publisher also has file types available that you can use to make your publications backward compatible with collaborators who are using previous versions of Microsoft Publisher.

- For more about Publisher file types, see “Creating a new publication,” in Chapter 27.

The following lists provide an overview of some of the file types used in Word, Excel, and PowerPoint, respectively.

Word:

File Extension	Description
docx	XML file type; default file type for Word 2010, 2013, 2016, and 2019 documents
docm	XML file type; macro-enabled document
dotx	XML file type; Word template
dotm	XML file type; macro-enabled Word template
doc	Binary file type; document compatibility with Word 97–2003
dot	Binary file type; template compatibility with Word 97–2003

Excel:

File Extension	Description
xlsx	XML file type; default file type for Excel 2007, 2010, 2013, 2016, and 2019 workbooks
xlsm	XML file type; macro-enabled workbook
xltx	XML file type; Excel template
xltn	XML file type; macro-enabled Excel template
xls	Binary file type; document compatibility with Excel 97–2003
xlt	Binary file type; template compatibility with Excel 97–2003

PowerPoint:

File Extension	Description
pptx	XML file type; default file type for PowerPoint 2007, 2010, 2013, 2016, and 2019 presentations
pptm	XML file type; macro-enabled presentation
potx	XML file type; PowerPoint template

potm	XML file type; macro-enabled PowerPoint template
ppsx	XML file type; PowerPoint show
ppsm	XML file type; macro-enabled PowerPoint show
ppt	Binary file type; presentation compatibility with PowerPoint 97–2003
pot	Binary file type; template compatibility with PowerPoint 97–2003

The 365 applications also provide other file formats that make it simple for you to share your documents or workbooks in a format designed for easy viewing. A good example is the PDF file format (created by Adobe Systems), which allows users who have a PDF reader, such as the free Adobe Reader software installed on their computers, to view your files. Windows 10 also provides a PDF viewer (Windows Reader) to view a PDF document. The viewer enables you to search the PDF document using the Find tool.

The XML Paper Specification (XPS) file format also makes it easy for others to view your work. Windows 10 supplies an XPS viewer that enables any Windows 10 user to open and view files in the XPS file type. Figure 3-1 shows the Windows 10 XPS viewer containing a Word document converted to an XPS document.

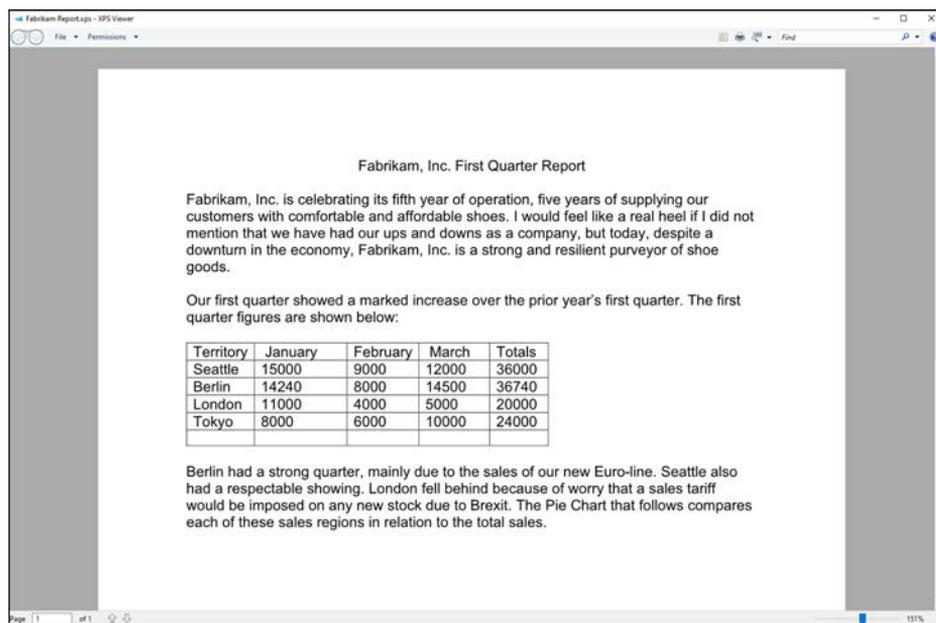


Figure 3-1 A Word XPS document in the XPS viewer

Both the PDF and the XPS file formats are primarily designed to enable you to share a view of a particular file without requiring that the applications themselves be installed on the computer of the user who will view the file. Although both the PDF and XPS file types require a particular viewer type to view the file, viewers such as Acrobat Reader and some XPS viewers (including

Microsoft’s XPS viewer) are available for free download on the web. Most operating systems, including Windows 10, have their own native PDF and XPS viewers.

NOTE

This chapter doesn’t address Outlook because of how it stores and works with different items such as emails and contacts, which is very different in how applications such as Word and Excel where you create discrete files. Part V, “Outlook,” covers everything you need about this powerful email, contact, and calendar application.

Saving files as different file types

When you create a new Word document, Excel workbook, or PowerPoint presentation, you eventually need to save your work to a file. As already mentioned, each of these applications uses the open XML file format by default. So, if you save a new Word document and do not change the Save As Type setting, you get a file with the extension .docx (the open XML format for Word).

When you save a file for the first time, the Save As dialog box opens. At a minimum, you must provide a file name for the new file, and you have the option of specifying the location where the file will be saved. You also have control over the file type used when the file is saved. You can select the file type in the Save As Type drop-down menu. Figure 3-2 shows the Word Save As dialog box with the Save As Type drop-down menu selected.

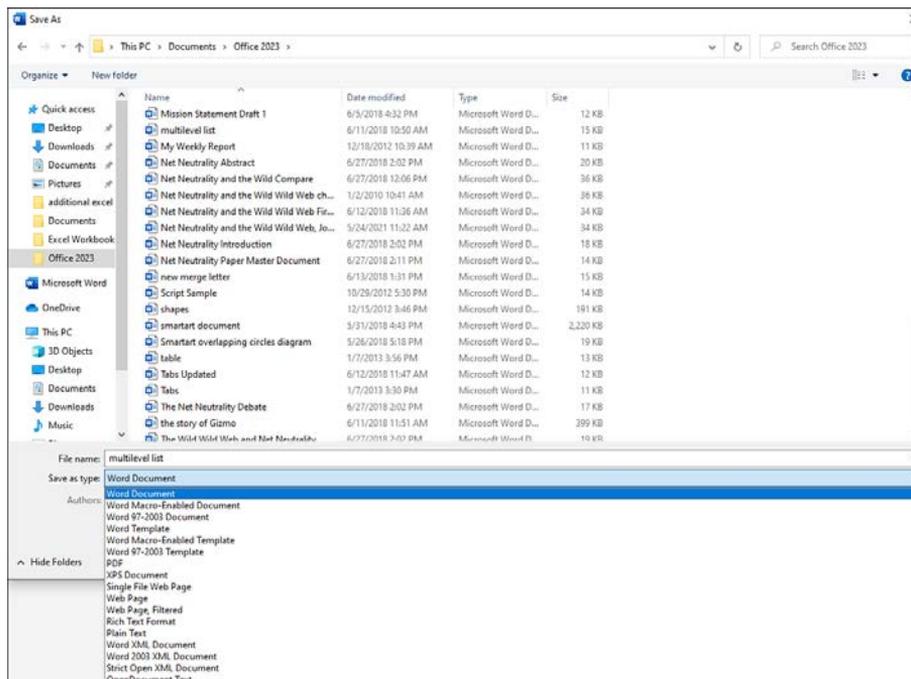


Figure 3-2 Selecting the file type for a Word document

After selecting the file type, click Save. When you have saved the file for the first time, use the Save button on the application's Quick Access Toolbar to save the changes that you make as you add to and edit the document.

You can also convert an existing file to another file type by using the Save As dialog box. After you save a file, the only route to the Save As dialog box is via the application's Backstage. Follow these steps to open the Save As dialog box for a previously saved file:

TIP

You can also save 365 files such as Word documents, Excel worksheets, and PowerPoint presentations in various web page formats, making it easy to include the content on a website.

1. Select File to access the Backstage.
2. Select Save As. The Backstage Save As page opens.
3. Select a place (location) to save the file on the left side of the Save As page. You can choose from This PC and cloud places such as your OneDrive or a network drive. You can also choose from existing Windows folders, such as Documents, Desktop, and Downloads.
4. Select Browse to choose your location and open the Save As dialog box.
5. In the Save As dialog box, use the Save As Type drop-down menu to specify the file type for the file.
6. You also have the option of changing the name and location for the newly created file.
7. Click Save. The Save As dialog box closes.

The file is saved using the new file format you selected. The file has a new name and save location if you changed these settings in the Save As dialog box.

Converting files to different file types

Save As gives you the capability to change a file's current file type to another file type. Another avenue for converting a particular file to a different file type is the Export page in the Backstage. You can access this page by selecting File and then selecting Export.

The Export page provides two possibilities: Create PDF/XPS Document and Change File Type. By default, the Create PDF/XPS Document is selected on the Export page, so to quickly create a PDF or XPS "copy" of the current file, click the Create PDF/XPS button. When the Publish As PDF Or XPS dialog box opens, it looks much like the Save As dialog box. By default, the file is saved as a PDF, but you can switch to XPS using the Save As Type drop-down menu. Specify a location file name, and then select Publish to save the PDF (or XPS) file.

The Export page also provides the Change File Type pane, which is accessed by selecting Change File Type on the left side of the Export page. The Change File Type pane makes changing the file type less confusing than just picking a file type from the Save As Type drop-down menu in the Save As dialog box. File types are visually represented in the Change File Type pane, and short descriptions of each file type are provided. Figure 3-3 shows the Excel Change File Type pane in the Backstage.

To create a copy of the current file in a new file type, select one of the alternative file types provided in the Change File Type pane. For example, you might want to save an Excel workbook that is currently in the Excel .xlsx file format (the default) to the Excel 97–2003 workbook file type (.xls) so that you can share the file with a colleague who uses an earlier version of Excel.

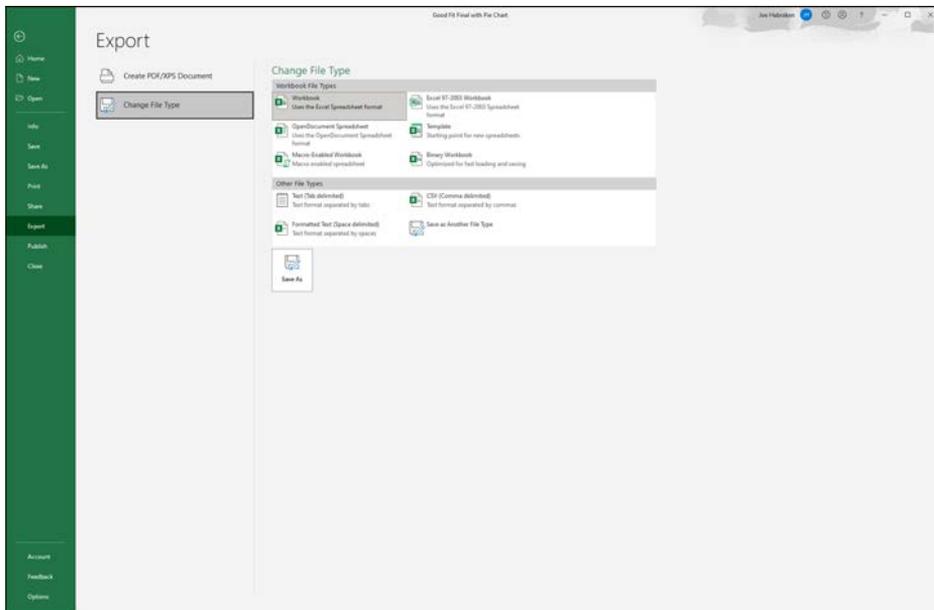


Figure 3-3 The Export page and the Excel Change File Type pane

Select the new file type in the Change File Type pane, and the Save As dialog box opens. The file type that you chose in the Change File Type pane is selected in the Save As Type drop-down menu. You can change the file name or the file location as needed and then click Save to save a copy of the original file in the file type.

Although going directly to the Save As dialog box via the Backstage Save As command might seem to be a faster option than getting to the Save As dialog box via the Change File Type pane, the latter option does a better job of laying out the possibilities. Until you have a good feel for which file type is which on the Save As Type drop-down menu in the Save As dialog box, use the Change File Type pane as an aid to select the appropriate file type for the file. Obviously, “appropriate” depends on what you are going to do with the file in its alternative file type.

Configuring save file options

When you save a file for the first time in one of the 365 applications, you obviously will have the option to specify the location where the file will be saved. By default, the applications are configured to save your files in your Documents folder. However, when you save a new file, you are ushered to the Backstage, and if you don't provide an alternative location, the files end up in the default folder—your Documents folder.

You can actually control the save options for an application and specify both the default file format for saving files and the default location for files and templates. You can even set an option so that the Backstage won't open every time you save a new file; this option enables you to “jump” right to the Save As dialog box. Other options that you control include the default file location and the default file format used to save files in a particular 365 application. The settings for these various options are in the Save pane of an application's Options window.

To open the Options window for an application, select File to open the Backstage. Then select Options. The Options window for the application opens. Click Save to view the save settings for the application. Figure 3-4 shows the Save pane for PowerPoint. The Save options for Word and Excel are similar.

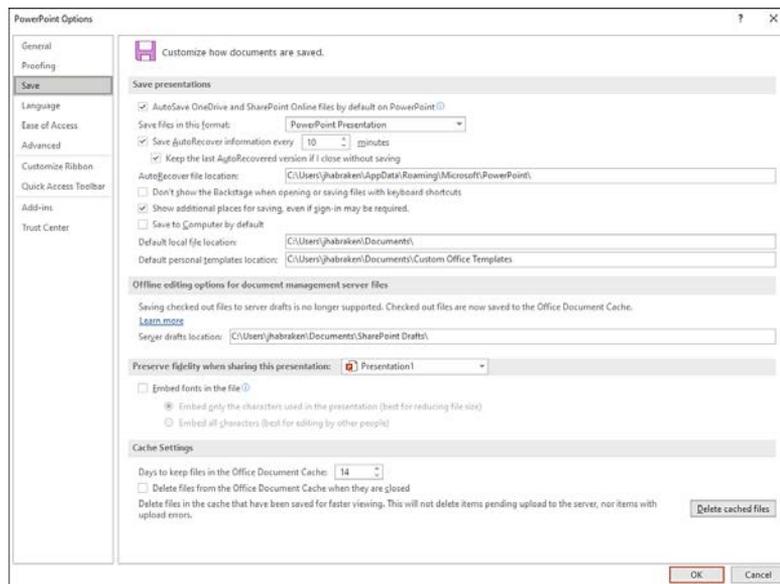


Figure 3-4 The PowerPoint Save options

To change the default file format, use the Save Files In This Format drop-down menu. Change the file format only if you have a good reason, such as the fact that you always work with people who use a legacy version of an application, and you want to match the file type that they use.

You can also edit the default file location. The default file location is used only if you also select Don't Show The Backstage When Opening Or Saving Files With Keyboard Shortcuts. Selecting this option takes you right to the Save As dialog box when you save a new file for the first time (instead of going to the Save As Page in the Backstage).

If you do want to specify the location where your files are stored by default, you can edit the entry in the Default Local File Location box. You are required to type the path, so you may want to use the Windows File Explorer to browse for the path so that you enter it correctly in the Default Local File Location box.

Other options provided by the Save pane relate to the AutoRecover feature and offline editing options when you work in an environment that uses network servers running SharePoint Server. Leave most of these options at the defaults—particularly those related to offline editing in a server environment.

CAUTION

If you work in a networked environment other than a home or small office environment, you might drive your network administrator completely insane if you change the default Save settings for your 365 applications. Check with your administrator before you attempt to change these settings.

Creating and managing files

The Microsoft 365 applications provide you with different ways to create new files. When you open one of the applications, such as Word, Excel, or PowerPoint, you are taken to the Start screen. The Start screen enables you to create a new blank file (such as a new blank document in Word), open files from the Recent list, or take advantage of a huge library of themes and templates.

Inside OUT

Choose or create the right template for your file

Everything that you create in the 365 applications is based on a template. Each application has a default template. For example, in Word, the default template is the Normal template and is used when you create a new blank document. By design, templates are ready-made blueprints for documents, workbooks, or other application files. For example, you might want to create a monthly budget for your household. If you want some help in creating the overall layout that goes into making this budget in Excel, you can take advantage of the Simple Monthly Budget template that is provided by Office.com and easily opened via the Excel Backstage. Remember, you are not limited to the templates that are provided by the various applications such as Word and Excel. You can also create your own templates so you have greater control over a particular Word document or Excel workbook.

When you want to create a more specialized document, workbook, or presentation, the easiest route is to take advantage of one of the templates provided by the application in which you are working. Templates often provide layout attributes, text formatting, and even placeholder text. The sophistication of the file created using a particular template depends on the actual template. For example, you might use a Word Memo template that creates a simple memo containing some placeholder text (that you replace) in the To, From, and Re: areas of the memo. Or you might take advantage of the Simple Monthly Budget template mentioned a moment ago. It provides individual tables in a worksheet for items such as projected costs and projected monthly income, and it supplies ready-made charts for your monthly expenses and expenses by category. Figure 3-5 shows a new Excel worksheet started using the Simple Personal Budget template.

You can also start a new file using a theme. A theme is a collection of colors, fonts, and text effects. Most of the possibilities provided on the Start screen and the Backstage New page are actually themes (unless you do an online search for templates on the Start screen or New page). Themes provide you with an overall document look, as a template does, but using a theme negates having to work within the confines of a template's placeholder text and other document settings. However, using themes or templates is a quick way to begin the process of creating an eye-catching document, presentation, or worksheet.

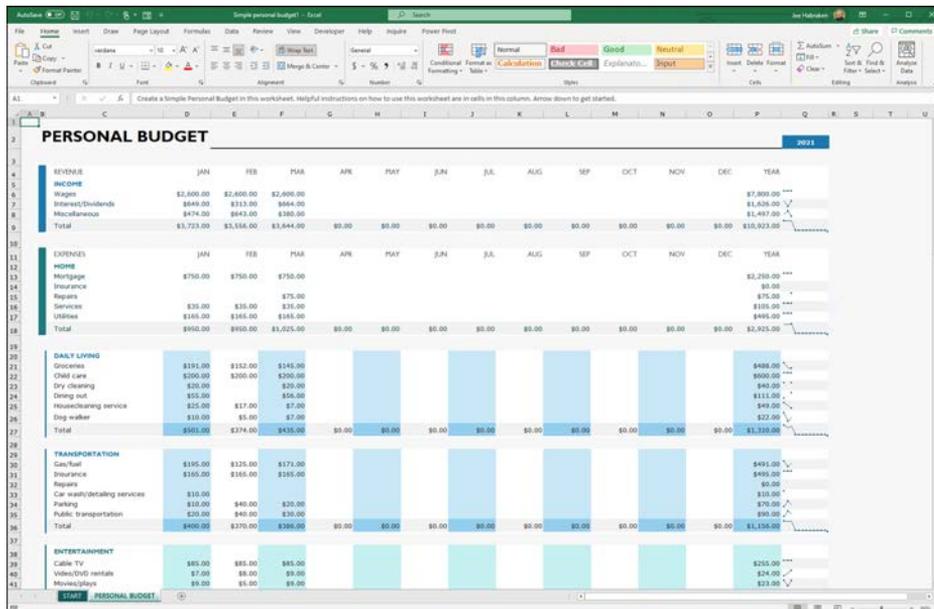


Figure 3-5 Excel's Simple Personal Budget template

You can take advantage of themes and templates in Excel, Word, PowerPoint, and Publisher. To start a new file based on a template or theme, follow these steps:

1. Select File to open the Backstage.
2. Select New in the Backstage. The New page opens (which is similar to the Start screen). Figure 3-6 shows the Excel New page.
3. Select a template or theme in the New window to preview the template or theme. The Preview window also describes the theme or template.
4. If you want to search for an online template or theme, select one of the suggested searches at the top of the New page or enter keywords in the Search box and run the search.
5. The search results show all the templates available online that match your search criteria. On the right side of the Search results, you find a Category list. The categories listed are keyword subsets of all the templates that were found using your search terms. Each category has a number to the right showing how many of the listed templates fall into the category. You can view a subset of the search results by selecting a category.
6. If you selected a template stored locally on your computer, click Create. If the template is an Office.com template, click Download. In either case, a new file opens in the application window based on the template.

You determine whether to create your files from new blank documents, workbooks, or presentations or to take advantage of the various themes and templates available. Working with themes and templates can help you determine how a special document, such as a newsletter, or a special worksheet, such as an invoice, should be laid out. So instead of reinventing the wheel, it makes sense to take advantage of the benefits a template can provide. You can also use themes to great advantage when you are creating a “family” of documents that are related. For example, you might use the same theme for a Word document, an Excel worksheet, and a PowerPoint presentation that are related to a specific project you are developing.

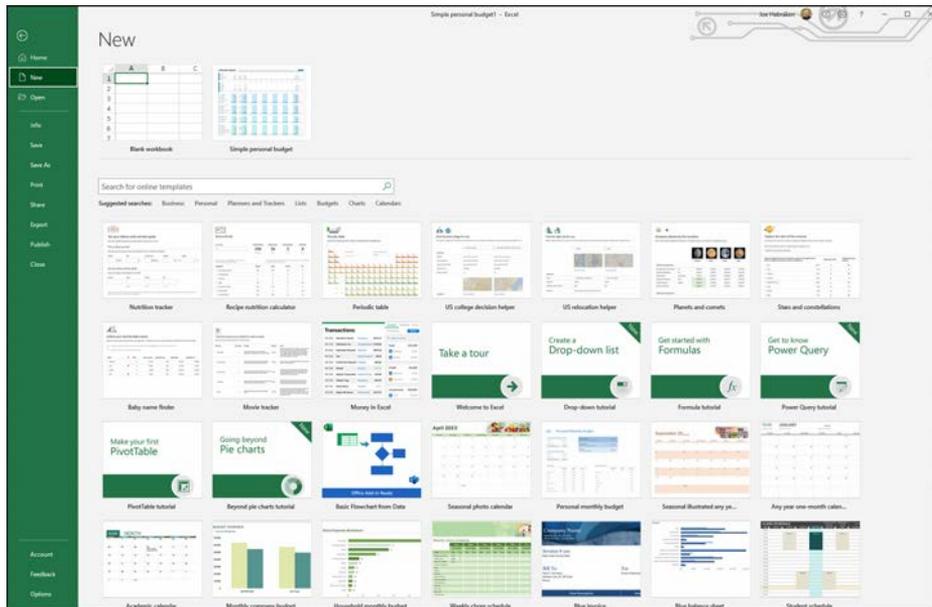


Figure 3-6 Create a new file based on a template or theme.

Managing files

Managing files effectively is a bit of an art form. You need to create some sort of structured environment that keeps your saved files organized but also makes it easy for you to find the files you work with often. Your particular situation might also require that you store your files in particular network shares (folders) so that others can easily access them. The Microsoft applications have adopted a cloud storage strategy that also makes it possible for you to easily store files on your OneDrive (both the free version and the version available with a Microsoft 365 subscription—OneDrive for Business), or a corporate SharePoint site.

Whether you store your files on your computer's hard drive, on a shared drive on a network server, or in the cloud on your OneDrive, you still must adopt a strategy for organizing your files. And whether you are talking about a hard drive or OneDrive, these storage containers can still be seen as the electronic equivalent of a filing cabinet. Each drawer in the filing cabinet is equivalent to a folder on the drive. The hanging file folders inside filing cabinet drawers are equivalent to the subfolders inside the main folders.

The naming conventions you use for the folders and subfolders you create are really up to you but should reflect some sort of system. For example, you could have a folder named Projects that contains subfolders named for each of the specific projects you are working on. Take some time to figure out your folder taxonomy. If you end up with a folder named Miscellaneous, I recommend that you rethink your naming system.

NOTE

You might want to use your Documents folder as the parent container for the subfolders you create for your various projects. This enables you to create the necessary folder structure without cluttering the C: drive with a lot of new folders. This method of organizing files in folders and subfolders has been around as long as the Windows operating system.

An alternative to organizing files in folders and subfolders is to take advantage of the file library that is provided by Windows 10. The library approach helps you organize and access your files, no matter where you store them on your computer (or your network).

In Windows 10, a library is a container that gathers files from different locations on your computer and your network and displays them as a collection that you can access. By default, Windows 10 provides the Documents, Music, Pictures, and Videos libraries. You can toggle the libraries on (if you don't see them) in the File Explorer by right-clicking the Navigation pane and selecting Show Libraries.

So you can go "old school" and create folders and subfolders on your computer's hard drive, or you can take advantage of libraries to give you easy access to the files you use. Whether you are creating new folders on your computer or on a network share assigned to you, you can use the File Explorer as your primary tool. The same goes if you want to create new libraries: Use the File Explorer.

The next two sections look more closely at creating folders and libraries on your computer's hard drive. Working in the cloud and organizing cloud storage is similar in most respects to organizing a "physical" drive. You can create folders on both your OneDrive or other network drives that you access. OneDrive for Business also gives you the capability to create and manage libraries. Both OneDrive for Business and Windows 10 allow you to create libraries that serve as virtual containers for the files that you create and share.

Creating a new folder

In Windows 10, switch to the desktop and then click the File Explorer icon on the taskbar. File Explorer (shown in Figure 3-7) provides links on the left side of the window, such as various links to the desktop or your current libraries (Documents, Music, and so on). In its main pane, you can see a listing of the hard drives, DVD drives, CD drives, and so forth on your computer and any network shares (in the Network Location area) configured for your use (including SharePoint sites).

TIP

You can also create new folders in a 365 application's Save As dialog box. Navigate to where you want to create the new folder, and then select New Folder on the toolbar in the Save As dialog box. Provide a name for the folder. You can now use the folder as a location to save the current file (and subsequent files) as needed.

To view the folders on a particular drive, such as the C: drive (which is typically the default drive on most PCs), double-click the drive. You can create new folders on any drive or in existing folders, such as the Documents folder. Navigate to the drive or folder you want to serve as the parent container, and then click the New Folder button on File Explorer's ribbon. Type a new name for the folder, and you are good to go. You can drag existing files and folders into the new folder (using File Explorer) and specify the new folder when you save a file in the Save As dialog box.

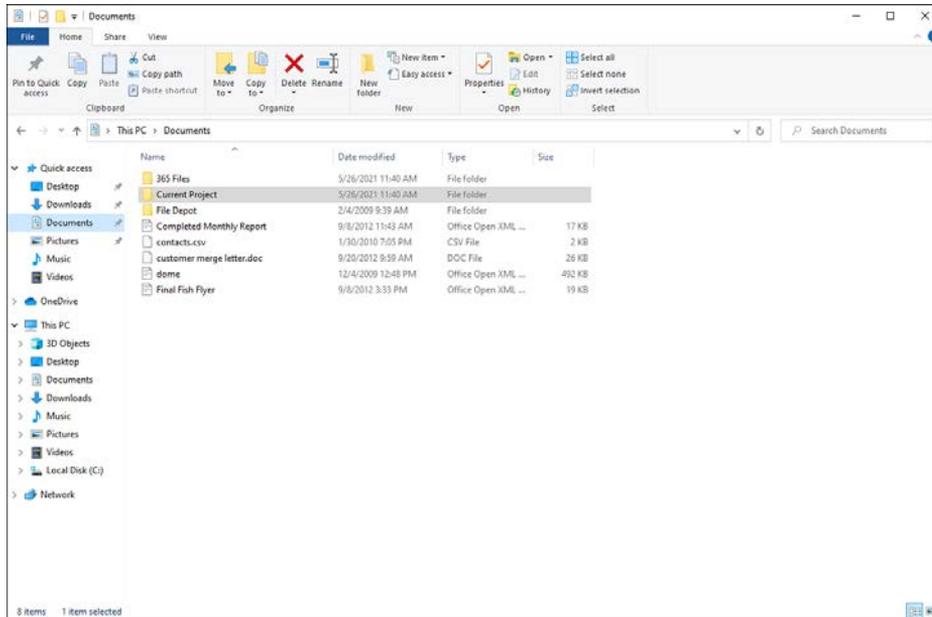


Figure 3-7 Create new libraries or folders using File Explorer.

Creating a new library

As already mentioned, a Windows library enables you to view and access files from different locations on your computer and your network. A library isn't really a container because a library doesn't store the actual files. A library is a kind of virtual container that can point to different folder locations and enable you to access related files (such as all the files related to a particular project).

To create a new library in File Explorer, follow these steps:

1. Right-click the Navigation pane and select Show Libraries. This places the Libraries icon in the Navigation pane.
2. Right-click the Libraries icon and point at New on the shortcut menu.

3. Select Library and a New Library appears in the Details pane.
4. Click on the default library name (New Library) and then type a name for the library.

Once you have created a library, you can add folders to the library as needed. Use File Explorer to navigate to any folder on your computer or your network. Right-click the folder and then point at Include In Library. A list of available libraries appears. Select the desired library.

When you are working in one of the 365 applications and want to open a particular file from one of your libraries using the Open dialog box, select the desired library in the Location list and then locate the file you want to open. You can also save your files to folders in a library when you are in the Save As dialog box.

Viewing file versions in an application

When you are working in an application such as Word or Excel, the application uses the AutoRecover feature to create different versions of the file on which you are working. By default, the 365 applications save AutoRecover information for your current file every 10 minutes. If you accidentally close a document or workbook in Word or Excel without saving, the last AutoRecovered version of your file is saved so that you can access it. This is also a default setting in the application's Save options.

When you save a file and close it, all the AutoRecovered versions of the file are deleted. But you can peruse the different versions of your file saved by the AutoRecover feature as you work on the document. This includes any unsaved versions of the document that exist because you did not save changes that you made to the file before you closed it.

To view any unsaved versions of the current file, such as a Word document, select File to open the Backstage and then click Info. Figure 3-8 shows the Info window for a Word document. The area of interest in this window is the Manage Document area. Note that in Figure 3-8, a version of the file exists (from earlier in the day) because the Word document was autosaved (which happens by default every 10 minutes).

You can also browse for unsaved versions of a file by clicking the Manage Document button and then selecting Recover Unsaved Documents. This enables you to browse for any unsaved versions stored on your computer. Any unsaved versions of the current document that have been automatically saved are listed in the Versions area of the window.

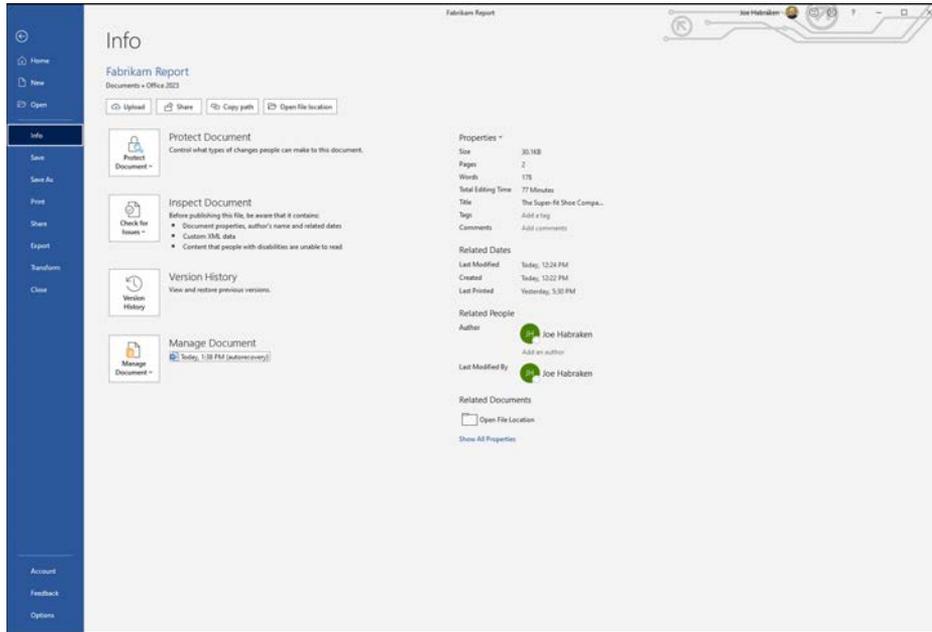


Figure 3-8 The Word Info page

You can open a version of the file from the list by selecting it. When you open the automatically saved version of the file (which is labeled “Unsaved”), a message bar appears at the top of the document window below the ribbon. It states that the current document is a “Recovered Unsaved File” and the file is temporarily stored on the computer. You are provided two options: Compare and Restore. You can select Compare to compare this version of the file with the current version of the file. Any differences between the two files are detailed using the Track Changes feature and are displayed in the document and the Reviewing pane. You can go through each of the changes marked in the document and accept or reject them as needed.

You also have the option of selecting Restore. This option saves the AutoRecovered version of the file over the current copy of the file. A message box opens, letting you know that the current version will be overwritten by the restored version. Click OK to overwrite the current version.

Searching for 365 files

If you haven’t done a good job of keeping your files organized and can’t seem to locate the file you need, you have a couple of ways to search for files. One option is to use the Search box provided by File Explorer. Open File Explorer, and then select the location for the search using the icons on the left of the File Explorer window. You can then type the file name or a portion of the file name in the search box; the search begins automatically.

The File Explorer window supplies the results of the search. You can modify the search as needed. You can also open a file listed in the search results. The Close Search button closes the search and returns you to the previous File Explorer window.

NOTE

The File Explorer provides you with a tab of Search Tools when you run a search. Location commands enable you to specify where the search should take place (current folder versus subfolders). Commands are also available to refine the search, such as Date Modified, Kind, and Size.

Another option for searching your files is to search in an application's Open dialog box. This is particularly useful if you remember at least part of the file name but don't really remember what folder contains the actual file. To access the Open dialog box, select File to open the Backstage. Then select Open. On the Open page, select a particular location, such as Computer. You can then select the Browse button to access the Open dialog box.

In the Open dialog box, navigate to the drive, folder, or library that you want to search for the file. Type your keywords for the search into the Search box in the upper-right corner of the Open dialog box. Files that match your search criteria have the search keywords highlighted in both the document title and document content, as shown in Figure 3-9.

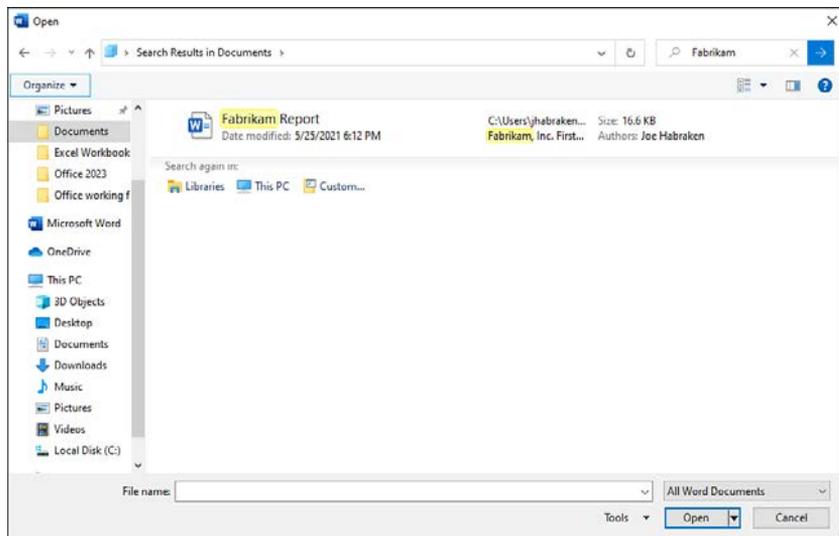


Figure 3-9 The Word Open dialog box, as it appears after you have searched by keyword

If you want to search a different folder using the same search, select that folder in the Organize list and then click the Search box to select your recently used keywords. When you want to open a file that has been identified by the search, double-click the file name to open it in the current application.

Protecting a 365 file

The 365 applications enable you to protect a file (such as a document or workbook) that is shared with other users (particularly users on a network). The Protect Document settings help protect the content of the file and can also potentially restrict what can be changed in the document and by whom. To view these options, click the Protect Document button in the Info window, as shown in Figure 3-10.

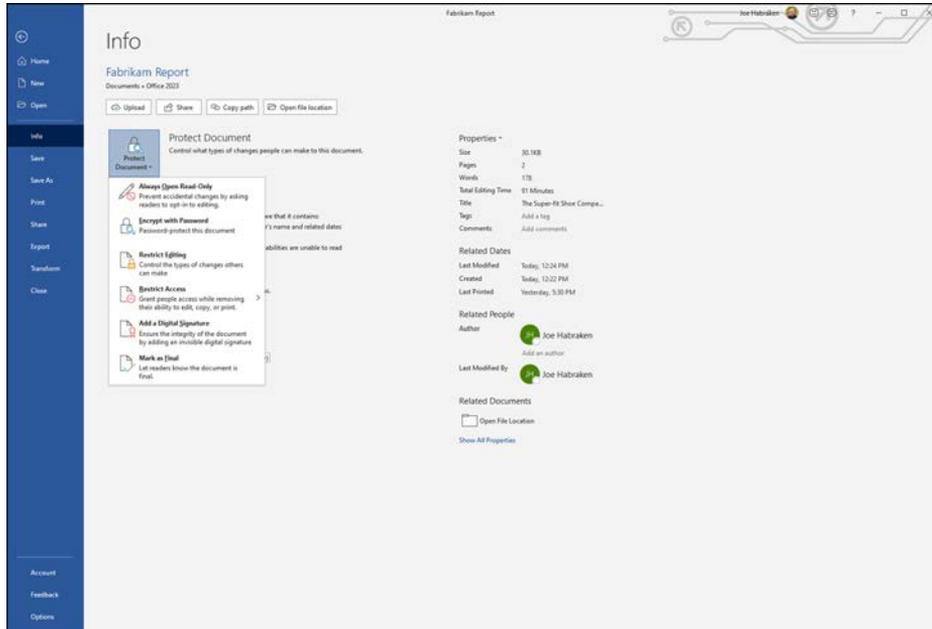


Figure 3-11 Select a document protection strategy on the Info page.

The following options are available:

- **Always Open Read-Only:** When you choose this option, documents you share are opened in read-only mode. This feature is primarily designed to keep users from inadvertently making changes to a file upon first inspection.
- **Encrypt With Password:** The file is encrypted and protected with a password. When you select this option, you are required to enter a password for the file. Only users with the password can open the file.
- **Restrict Editing:** This command opens the Restrict Formatting and Editing task pane in the document, presentation, or worksheet window. You can restrict formatting to a selection of styles and specify editing restrictions for the document, including making the document read-only.

- **Restrict Access:** This option enables you to take advantage of a Digital Rights Management server. This type of service allows you to assign users different permission levels for the file.
- **Add A Digital Signature:** You can digitally sign a file to prove its authenticity. Signing a file digitally requires that you obtain a digital certificate. A certificate authority can provide digital certificates.
- **Mark As Final:** This command marks the file as final and makes the file read-only. All editing commands for the file are disabled; however, any user opening the document can remove the Mark As Final setting in the Backstage.

The first three options provided by Protect Document are available to 365 users (home, small business, or big business). The Always Open Read-Only option is useful when you want your collaborators to opt-in to editing privileges by providing for a read-only look at the document prior to having editing access to the file.

Encrypting the document with a password (the second option) definitely limits access to the file because the password is necessary to open it. This means that you also must keep track of the password because it is the only way to open the encrypted file. This is a strong security measure, but it can backfire if you forget the password for the file.

The Restrict Editing setting enables you to be somewhat selective in what you allow other users to do to the file. You can specify both formatting and editing restrictions using the Restrict Editing task pane. You can also choose parts of a document or worksheet and specify the users who can edit those portions of the file. This feature requires that you have user groups on your network, such as domain user groups on a Windows Server network.

The Restrict Access setting requires that you have access to a Digital Rights Management server (DRM server). So if you work in a corporate environment that provides a DRM server, you can take advantage of this way of securing your files. Restricting access using a DRM server enables you to specify a particular user (by username or email address) and then assign a level of access to that user.

Digitally signing a file is a way to authenticate that a file is from a trusted source. So adding a digital signature to a file is more about letting users with whom you share the file know that the file is authentic and does not contain any malicious code that might damage their computers or computer files. Adding a digital signature to a file protects your collaborators—the people who review the shared file—more than it protects you from a particular security problem.

To digitally sign a file, you need a digital certificate. You can obtain digital certificates from an online certificate authority such as Global Sign (globalsign.com) and DigiCert (digicert.com); depending on the size of your business, you might find digital certificates cost prohibitive. CAcert (www.cacert.org) is a community-based certificate authority that offers certificates to members for free.

You can also create a digital certificate using the Digital Certificate for VBA Projects utility provided with 365. Appendix B, “365 macros,” provides a walkthrough of using this utility in the section “Digitally signing macros.”

You should digitally sign a file only when you are providing a final draft to your collaborators. Signing the file marks the file as final, which makes it read-only. That means when you have a final file, and the certificate is on your computer, you are ready to go.

Click Protect Document and then Add A Digital Signature. The Sign dialog box opens. Enter the commitment type and the purpose for signing the file. Your default signing certificate is listed in the dialog box in the Signing As pane. You can click the Change button to locate a different certificate if you have multiple certificates on your computer.

When you are ready to sign the document, click Sign. The Signature Confirmation box opens, letting you know that your signature has been saved with the document. However, if the document is changed, the signature becomes invalid.

Preparing a file for sharing

The Microsoft 365 applications also give you tools for checking a document before you share it. These features are primarily designed for both security and accessibility issues. For example, you can check the document for any personal information that might be contained in it; this is a security check because you don’t necessarily want to share personal information in the shared document. Or you might have text in the document that will be difficult for people with disabilities to read; this is an accessibility issue.

The Check For Issues button on the Info window in the Backstage provides three tools that check your file for possible issues related to sharing:

- **Inspect Document:** This tool inspects the document for specific content such as comments, annotations, document properties, and hidden text. The main purpose of the inspector is to help ferret out personal information that you might have inadvertently stored in the document.
- **Check Accessibility:** This tool opens the Accessibility Checker task pane in the document and provides a list of warnings related to accessibility issues in your document. For example, several blank lines between paragraphs might signal to a person using a screen reader that the document has ended. As you select each warning in the task pane, you are presented with information on why you should fix the issue and suggestions on how to fix it.
- **Check Compatibility:** This tool checks the file for items that are not supported by earlier versions of the application you are using. For example, you might have used the Citation and Bibliography features in Word, but the Compatibility Checker tells you the earlier versions of Word (Word 97–2003) need to convert these items to static text.

As already mentioned, you can run these tools from the Backstage in the Info window. The purpose of these tools is to negate the chance of sharing personal information (Inspect Document), to make sure that the file is accessible to users with disabilities (Check Accessibility), and to ensure that users of earlier versions of Microsoft products can access the file and view its content (Check Compatibility).



Index

Symbols

3D models, PowerPoint, 586

A

Access, 12

importing to Excel, 484–485

Accessibility Checker task pane,
67

Accessibility group (Shape
Format tab), 92

Account command, Backstage,
30

Add A Service dialog box, 102

add-ins, 41–42

addresses

envelopes (Word), 232

mapping, 780

Adobe Acrobat

PDF files, PowerPoint presen-
tations, 663

Adobe Reader, 51

Advanced Options settings,
40–41

.aiff (Audio Interchange File
Format), 626

alignment

Word

charts, 180

paragraphs, 147

pictures, 180

tables, 219

Excel, 362

text, 346

PowerPoint, 546–547, 558

Publisher

fonts, 847

tables, 874

Animation Painter (PowerPoint),
622

antivirus software, 799

applications, 108

add-ins, 41

Advanced Options settings,
40–41

collaboration, 888

data sharing, 887, 888

file sharing, 887

Online apps, 97

options, customizing, 38, 40

Options window, 38

updates, 128

Web apps, 8

application window, 22

dialog box launcher, 23

Outlook, 690–691

Quick Access Toolbar, 23

ribbon, 23

ruler, 24

shortcut menus, 23

status bar, 24

task panes, 23

title bar, 22

Arrange group (Shape Format
tab), 92

artistic effects, pictures, 84

attachments (Outlook)

security, 803

saving, 728–729

Attach Template dialog box, 136

AutoArchive (Outlook), 819

folder options, 821–822

settings, 820–821

AutoComplete, Excel, 320, 321

AutoCorrect, Word, 199

AutoFilter, 470–473

AutoRecover, 56, 62

AutoSum (Excel), 394, 395

AutoText (Word), 196

B

background removal, pictures,
83

Background Removal tool, 86, 88

Backgrounds (PowerPoint),
themes, 574–575

Backstage, 3, 28

Account command, 30

Account page, 17

Add A Service, 103

Close command, 30

Connected Services list, 17

entering, 17

Excel

Backstage Info page, 309

Check For Issues, 315

Home page, 113

Info page, 113

New page, 113

new workbook, 303

Open page, 113

Print page, 340–342

Export command, 30

Export page, 53

- Feedback command, 31
- File tab, 28
- Help and, 17
- Home command, 29
- Home page, 28
- Info command, 30
- New command, 29
- New page, 58
- Open command, 29
- Options command, 31
- Outlook log in, 800
- PowerPoint, 532
- Print command, 30
- Publisher, business information set, 841–843
- Save As command, 30
- Save As dialog box, 53
- Save command, 30
- saving files to cloud, 105
- Share command, 30
- Transform command, 30
- Word
 - New page, 132
 - Print window, 157–159
 - Proofing Options, 193
- Word Online, 107–108

backward compatibility, 49**bar charts, 184**

- Excel data bars, 365

bibliographies (Word), 274

- citations, 274–275
- inserting, 277–278
- Source Manager, 276–277
- style, 275

Bing

- Online Pictures browser, 183–184
- Search box and, 6
- Bing Maps, 42

Blank Document template (Word), 130**.bmp (bitmap) files, 81, 852****bold text**

- PowerPoint, 556
- Word, 126

bookmarks, Word, 269, 288–289**borders**

- Excel, 362
- Word, 166–168

Borders and Shading dialog box, Word, 167**Borders gallery, Excel, 358–359****browsers, Online apps, 99****building blocks (Word), 197****built-in styles, Word TOCs, 259–260****bulleted lists, 75**

- icons as bullets, 596
- PowerPoint, 549, 551, 556
- Word, 162, 164

business cards (Outlook), 716**business information set (Publisher), 841–843****buttons**

- Import/Export, 34
- New Group, 34
- New Tab, 34
- Rename, 34
- Reset, 34
- Ribbon Display Options, 26

C**CAcert, 66****Calendar (Outlook), 687, 691, 702**

- appointments, 743–747
- attachment to Outlook message, 717
- Date Navigator, 740
- Day view, 740–741
- Email Calendar option, 754
- emailing calendars, 754–755
- emailing items, 754
- event scheduling, 746–747
- meetings, 789–791
- Month view, 741
- multiple, opening, 752–753
- My Calendars list, 739
- navigating, 739–743
- Options window, 757
- Overlay, 753

- publishing calendars online, 755–756
- Publish Online feature, 755
- responding to meeting requests, 793–794
- Schedule view, 742
- scheduling assistant, 758
- ScreenTips, 740
- searches, 748–750
- sharing, 750
 - invitations, 750, 752
 - opening shared calendars, 752
- sharing invitation, 756
- time scale, 742
- time zones, 743–744, 758
- weather, 741
- Week view, 741
- work time, 757
- Work Week view, 741
- Calendars gallery (Publisher), 857**
- Calls (Teams), 9**
- Captions (Word), 266–268**
- Cartesian coordinates in charts, 431**
- catalog merges (Publisher), 880–882**
- certificate authorities, 66, 918**
- Changes group (Review tab), 19**
- character formatting (Word), 141–142**
- Chart Design tab (Word), 185**
- charts, 70**
 - bar, 184
 - column, 184
 - doughnut, 184
 - line, 184
 - pie, 184
 - PowerPoint, 586
 - slides, 602–606
 - radar, 184
 - Word, 179–180
 - Excel datasheets, 185
 - inserting, 180–186
- charts (Excel)**
 - 3D area charts, 429
 - Add Chart Element, 444–445
 - Analysis Toolpak, 433
 - area charts, 429
 - axes, 424, 442, 449
 - background, 425
 - bars, 450, 452
 - bubble charts, 432
 - Cartesian coordinates, 431
 - categories, 424
 - Change Chart Type dialog box, 456
 - Change Colors gallery, 444
 - chart area, 424
 - Chart Elements button, 439
 - Chart Filters button, 439
 - chart objects, 440
 - Chart Styles button, 439
 - Chart Styles gallery, 441
 - Chart Tools, 425, 441
 - color, 448
 - column/bar charts, 427–428
 - combination, 425, 454
 - custom, 455–457
 - copying, 440
 - creating, 435–436
 - customizing, 439–440
 - data, changing, 441–443
 - data labels, 424, 447
 - data points, 447–449
 - Data series, 424
 - deleting, 440
 - doughnut charts, 432
 - drop lines, 450, 452
 - elements
 - Chart Elements pane, 446
 - selecting, 445
 - error bars, 452–453
 - Format Data Series task pane, 448–449
 - Format Legend task pane, 448
 - Format tab, 441
 - Format Trendline task pane, 451
 - gridlines, 424, 449
 - high-low lines, 452

- histogram charts, 433
- inserting from ribbon, 436
- layout, 443–444
- legend, 424, 447–449
- line charts, 425–428
 - x-axis, 428
 - y-axis, 428
- Move Chart command, 440
- moving, 440
- Pareto charts, 433
- pie charts, 428–429, 455
- plot area, 424
- Quick Analysis gallery, 438
- Quick Layout button, 443
- radar charts, 433
- Recommended Charts, 437
- scatter charts, 430
- secondary charts, 456
- Select Data Source, 443
- sparklines, 366, 457
 - creating, 457–458
 - modifying, 459
- stock charts, 431–432
- styles, 443–444
- sunburst charts, 434
- surface charts, 432
- titles, 447
- trendlines, 450–452
- type
 - Change Chart Type, 442
 - changing, 441–443
 - up/down bars, 452–453
 - waterfall charts, 434
 - XY (scatter) charts, 430

charts (Excel Online), 116

Chat (Teams), 9

Check For Issues button, 67

citations (Word), 274

- creating, 274–275
- Source Manager, 276–277
- style, 275

Click-to-Run, 13

clip art, 69

- Publisher, 856–857

clipart, 74

Clipboard

- Excel, 329
- Excel Online, 116

Clipboard group (Home tab), 20

Close command, Backstage, 30

cloud

- files, Online apps, 101, 103
- sharing saved files, 104–106

cloud storage, 59

collaboration, 6, 8

- applications, 888
- calendar sharing, 750, 752
- Excel, 310
 - comments, 354–355
 - data validation, 504
 - prepping workbooks, 315–317
- Microsoft Teams, 9
- modern comments, 6
- OneDrive, 8
- PowerPoint, 665–666
- Word, 128
 - private copies of shared documents, 11
 - tracking changes, 280–285

color

- borders and shading, 168
- Excel, 357
 - background color, 360
 - color scales, 366
- hex color codes, 11, 297
- Outlook
 - categories, 695–696
 - themes, 718
- pictures, correcting, 84
- PowerPoint
 - slides, 547
 - text, 564
 - themes, 572

- SmartArt, 79
- themes, 170
- column charts, 184**
- columns, Word documents, 226–228**
- Columns dialog box (Word), 227**
- comments**
 - Excel
 - deleting, 355–356
 - inserting, 354–355
 - moving between, 355
 - viewing, 355–356
 - Word, 289
 - contextual view, 128
 - modern comments, 128
 - Word Online, 111
- Comments group (Review tab), 19**
- Compare group (Review tab), 19**
- compatibility**
 - backward, 49
 - conversion utilities, 49
 - file formats, 49
- Compatibility Checker, 67**
- compatibility functions (Excel), 417**
- Connected Services (Backstage), 17**
- Contacts (Word), mail merges, 236**
- Contacts (Outlook), 691, 769**
 - Actions group, 787
 - address mapping, 780
 - Arrangement group, 771
 - business cards, 777–778, 783
 - Business Card view, 770
 - Card view, 770
 - categories, 779
 - Communicate commands, 786
 - Communicate group, 785
 - Contact dialog box, 772
 - Contacts folder, 780–781
 - creating, 772–776
 - Edit Business Card dialog box, 778
 - editing, 776–777
 - entering details, 774
 - fields
 - additional, 775–776
 - business cards, 778
 - filing options, 788
 - follow-up flags, 779
 - forwarding, 783–784
 - groups, 781–782
 - importing, 688
 - index, 788
 - List view, 771
 - mail merge, Word and, 787
 - Meeting command, 789
 - meetings
 - editing, 792–793
 - location, 790–791
 - scheduling, 789–790
 - Scheduling Assistant, 791–792
 - viewing, 792–793
 - moving, 787
 - online status, 788
 - options, 788
 - People view, 770
 - Phone view, 771
 - photograph, 788
 - photos, 774
 - printing, 788
 - Search People box, 780
 - sharing, 784–785
 - sorting, 771
 - tagging, 779
 - Tags group, 779
- Contextual tabs, 21**
- copying**
 - files, new file type, 54
 - links, sharing from cloud, 106
- Copy options, 40**
- copyright laws, pictures, 70**
- Creative Commons licensing, 71, 74, 183**
- Crop command, 86**
- cropping pictures, 86**
- cross references, Word, 269–270**

cube functions (Excel), 416
 Customize Quick Access Toolbar button, 35–36
 Customize Quick Access Toolbar menu, 28
 Customize Ribbon window, 33
 custom styles (Word), TOC and, 261–262
 custom tabs, 34
 Cut options, 40

D

databases, 461
 Excel, connecting to, 488
 flat file, 462
 ODBC (Open Database Connectivity), 491
 relational, 462

data (Excel)
 external sources, 488–489
 what-if analysis, 510–511
 Goal Seek, 510

data files (Outlook), 680–681
 folder, 682
 repairing, 685–686

data merges (Publisher), 877
 catalog merges, 880–882
 mail merges, 877–880

data series
 Excel, stock charts, 431
 pie charts, 429

data sharing
 between applications, 887–888
 Outlook, 901–902

data tables (Excel), 511

data validation (Excel), 503
 criteria specification, 504–506
 error checking, 509
 invalid data, circling, 508–509
 templates and, 509
 tips, 509
 validation rules, 503–504
 creating, 504
 error alerts, 506–508
 input message, 506–508

date and time, Excel functions, 414
 Date Navigator (Outlook), 740
dates
 Excel, 320
 Word, fields, 252

Default Local File Location box, 56

Defender, 799

Design Checker (Publisher), 883–884

Designer pane (PowerPoint Online), 117

Design tab
 PowerPoint Online, 118
 SmartArt, 79
 Word, 170

Developer tab, 34
 adding to ribbon, 904–905
 commands, 910–911
 macros, 910–912

Developer tab (Word), 136

diagrams, SmartArt, 71–76

Dictate command, 109

Dictation (Word), 127

Digicert, 66

digital certificates, 918

digital IDs, 804

digital pictures, 70, 81
 file compression, 81
 file formats
 .bmp, 81
 .gif, 81
 .jpg, 81
 .png, 81
 .tif, 81
 .wmf, 81

digital signatures
 email, 804, 806
 Excel, 311
 files, 66
 macros, 917–920

Display options, 41

document formatting (Word), 140
 character formatting, 141
 editing, 203–204

- managing, 204–207
- manual, 142
- paragraph formatting, 141
- Quick Styles gallery, 201–202
- styles, 200

Document Info command (Word), 175, 177–178

Document Inspector (Excel), 315–316

documents (Word), 155

- columns, 226–228
- insertion point, 138
- keyboard, 139
- large, 257
- margins, 155
- master, 257
- Master Document, 290–294
- mouse, 138
- navigating, 137–140
- saving as templates, 135
- section breaks, 228–230
- section formatting, 230
- sections, 257
- split window, 192
- templates, attaching, 136
- TOC (table of contents), 258–266
- Word Online, 107

Documents library, 60

Document Views group (Word), 187–189

doughnut charts, 184

Draw tab (PowerPoint Online), 118

DRM (Digital Rights Management), 66

drop caps, text boxes (Publisher), 848

drop-down arrow, 25

E

editing files, restricting, 65–66

Editing options, 40

Editor command, 4, 19, 109

Editor pane, 4

Editor (Word), 192–194

Editor (Word Online), 111

effects, themes, 170

- Outlook, 718

Effects (PowerPoint), 562

- animation, 615–616
 - motion path, 616–622
- options, 623
- themes, 574

email

- IMAP protocol, 672
- Internet email, 672–673
- Outlook, 718
- Outlook.com, 672
- POP3 account, 672
- POP (Post Office Protocol), 672
- SMTP (Simple Mail Transport Protocol), 672

email accounts

- Exchange, 676–677
- Google, 676
- IMAP (Internet Message Access Protocol), 677
- Microsoft 365, 676
- Outlook, 670–671
 - adding, 671, 674, 676–677
 - Advanced Setup window, 676
 - manual setup, 675
 - settings, 680
- Outlook.com, 676
- Outlook profile, 677–680
- POP, 676

email (Outlook)

- focused, 693
- messages, deleting, 729–730
- importing, 688
- items to calendar, 754
- security, 803
- signatures, 719–720

embedding objects, 898

- editing, 901
- new objects, 900
- Object command, 899–900
- Paste Special, 899

encrypted email, 804–806

endnotes (Word), 269, 278–279

engineering functions (Excel), 416

envelopes (Word), 232, 234, 251–252

error alerts, Excel data validation, 506–508

error checking, data validation, 509

error messages (Excel), 417–418

Excel, 12

3D models, 297

Access and, importing data, 484–485

access restriction, 311

alignment, merging cells, 370–371

Analysis Toolpak, charts, 433

Analyze Data tool, 301

auditing tools, 419–420

AutoComplete, 320–321

AutoFill, 323

AutoSum, 394–395

Backstage

Backstage Info page, 309

Check For Issues button, 315

Home page, 113

Info page, 113

New page, 113

new workbook, 303

Open page, 113

Print page, 340–342

Borders gallery, 358–359

calculations, 383

cell ranges

borders, 358

permissions, 314

protecting, 313–315

cell references, 402–404

cells

annotating, 356

borders, 358–359

clearing contents, 332

color, 360

copying formatting, 362

deleting, 332

editing content, 333

inserting, 369–370

locking, 311, 313

merging, 370–371

moving, 331–332

permissions, 314

protecting, 313–315, 362

style creation, 361–362

styles, 360–361

Cell Styles gallery, 360–361

charts, 70

Add Chart Element, 444–445

Analysis Toolpak, 433

axes, 424, 442, 449

background, 425

bars, 450, 452

Cartesian coordinates, 431

categories, 424

Change Chart Type command, 442

Change Chart Type dialog box, 456

Change Colors gallery, 444

chart area, 424

Chart Elements button, 439

Chart Elements pane, 446

Chart Filters button, 439

chart objects, 440

Chart Styles button, 439

Chart Styles gallery, 441

Chart Tools, 441

color, 448

column/bar charts, 427–428

combination, 425, 454–457

copying, 440

creating, 435–436

customizing, 439–440

data, changing, 441–443

data labels, 424, 447

data points, 447–449

data series, 424

datasheets, 185

deleting, 440

drop lines, 450, 452

- elements, selecting, 445
- error bars, 452–453
- Format Data Series task pane, 448–449
- Format Legend task pane, 448
- Format tab, 441
- Format Trendline task pane, 451
- gridlines, 424, 449
- high-low lines, 452
- in PowerPoint slides, 602
- inserting from ribbon, 436
- layout, 443–444
- legend, 424, 447–449
- line charts, 425, 428
- Move Chart command, 440
- moving, 440
- pie charts, 455
- plot area, 424
- Quick Analysis gallery, 438
- Quick Layout button, 443
- Recommended Charts, 437
- secondary charts, 456
- Select Data Source, 443
- sparklines, 366, 457–459
- styles, 443–444
- titles, 447
- trendlines, 450, 452
- type, changing, 441, 443
- up/down bars, 452–453
- Chart Tools, 425
- Circular Reference Warning, 418
- Clear command, 332
- Clipboard, 329
- collaboration, 310
 - data validation and, 504
 - prepping workbooks, 315–317
- color
 - background color, 360
 - color scales, 366
 - hex color codes, 297
- Colors gallery, 357
- columns
 - AutoFit Column Width, 373
 - Column Width dialog box, 374
 - deleting, 375
 - freezing, 375–377
 - hiding, 375
 - inserting, 374
 - width, 373–374
- comma style, 350
- Comment group, 355–356
- comments, 354–356
- Comments button, 302
- Comments pane, 355–356
- Commission Percentage, 400
- conditional formatting, 363
 - color scales, 366
 - copying rules, 367–368
 - creating rules, 367–368
 - data bars, 365
 - highlight cells rules, 364–365
 - icon sets, 367
 - top/bottom rules, 365
- Conditional Formatting command, 363
- Copy command, 327, 404
- Cut command, 327, 404
- data, external sources, 488–489
- data bars, 365
- databases, SQL Server, 488
- data series, pie charts, 429
- datasheets, charts, 185
- Data tab, 462
- Data Table dialog box, 512
- data validation, 503
 - circling invalid data, 508–509
 - collaboration and, 504
 - criteria specification, 504–506
 - error checking, 509
 - templates and, 509
 - tips, 509
 - validation rules, 503–508
- Data Validation dialog box, 506, 508

- dates, 320
- decimals, increase/decrease, 350
- Delete command, 375
- digital signatures, 311
- Document Inspector, 315–316
- enhancements, 299
- Error Checking, 418
- Euro Currency Tools, 398
- external data, 493–494
- files
 - saving, 307
 - types, 50
 - .xlsx format, 309
- Fill handle, 321–325
- Find And Replace, 371–373
- Flash Fill, 326–327
- Fonts gallery, 357
- Forecast Sheet, 523–524
- Format Cells, 311
- Format Cells dialog box, 346–347, 350–351, 362
- Format Painter, 362
- formulas, 383
 - arithmetic operators, 389
 - comparison operators, 390
 - copying, 404
 - creating, 389–390
 - editing, 389–391
 - editing cell references, 392
 - entering, 391
 - error messages, 417–418
 - moving, 404
 - operands, 390
 - operator precedence, 390–391
 - proofing, 417–421
 - range names in, 399–400
- Formulas tab, 397
 - Calculation, 398
 - Defined Names, 397
 - Formula Auditing, 397
 - Function Library, 397
- Freeze Panes command, 376
- Function Arguments, 398
- Function Arguments dialog box, 393
- Function Library, 397–399
- functions, 319, 384, 387, 392
 - arguments, 392–393
 - AutoSum, 394–395
 - categories, 396
 - compatibility, 417
 - copying, 404
 - cube, 416
 - date and time, 414
 - engineering, 416
 - entering, 393
 - error messages, 417–418
 - financial functions, 405–407
 - Function Arguments, 401
 - information, 416
 - Insert Function command, 396–397
 - logical functions, 407–409
 - Lookup & reference, 410–413
 - math & trig, 416
 - moving, 404
 - proofing, 417–418
 - range names in, 399–401
 - resources, 387
 - searching for, 396
 - statistical functions, 395, 409–410
 - SUM, 392, 394
 - text, 414–416
- Goal Seek, 510, 518–519
- Greater Than dialog box, 364
- Group command, 480–482
- Home screen, 299
- Illustrations group, 71
- Import Data dialog box, 487
- Insert Chart dialog box, 436
- Insert dialog box, 370
- Insert Function command, 396–397
- Insert Sheet Columns, 374
- Insert tab, 381
- labels, 318–319

- Linked Data Types, 298
- Lookup function, 10
- macros, 909
- Manage Workbook area, 317
- Merge & Center command, 370–371
- Microsoft account, 299
- Microsoft Power BI and, 10
- Name box, 302
- New Formatting Rule dialog box, 367
- notes, 356
- Number Format gallery, 350
- number formats, 351–354
- Number group, 350
- numeric formats, 350
- outlines, 480–482
- page breaks, 335
- Page Layout, 335
- Page Setup group, 337–338
- passwords, 310
- Paste command, 327, 404
- Paste gallery, 328–329
- Paste Special, 329–331
- percent style, 350
- pivot tables, 494–502
- PowerPoint and, 319
- Protect Sheet dialog box, 313
- Protect Workbook command, 310
- range names, 378–379
 - formulas, 399–400
 - functions, 399–401
 - naming from selection, 379–380
- Range Password text box, 314
- ranges
 - Edit Name dialog box, 380
 - edit ranges, 313–315
 - moving, 331–332
 - Name Manager, 380
 - text formatting, 346
 - transposing, 331
- references
 - absolute references, 388
 - absolute referencing, 386–387
 - editing in formulas, 392
 - mixed references, 388
 - relative referencing, 385
- ribbon
 - Analysis tab, 301
 - Data tab, 301
 - Formulas tab, 301
 - Help tab, 301
 - Home tab, 300
 - Insert tab, 300
 - Page Layout tab, 301
 - Review tab, 301
 - View tab, 301
- rows
 - AutoFit Row Height, 373
 - deleting, 375
 - freezing, 375–377
 - height, 373–374
 - hiding, 375
 - inserting, 374
 - Row Height dialog box, 374
- Save This File dialog, 307
- Scenario Manager, 511, 514
 - cell specification, 515
 - creating scenarios, 513–515
 - naming, 514
 - PivotTable reports, 517
 - scenario summaries, 517
 - Scenario Values dialog box, 515–516
 - viewing scenarios, 516–518
- Search box, 302
- series, 322
 - AutoFill, 323, 325
 - custom, 325–326
 - custom fill lists, 324–325
 - date, 325
 - Fill handle, 322–325
 - filling, 321–322

- Flash Fill, 322
- growth, 325
- linear, 325
- Series dialog box, 325–326
- Share button, 302
- sheets, 299
 - associated sheets, 509
 - custom, tables and, 478–479
 - deleting, 307
 - external data, 298
 - freezing rows and columns, 375–377
 - graphics, 381–382
 - hiding, 377
 - images, 381–382
 - inserting, 306
 - inserting into workbooks, 306–307
 - Insert Sheet Columns, 374
 - navigating, 302–303
 - Online Pictures, 381
 - ordering, 306–307
 - page breaks, 339–340
 - Page Layout, 337–339
 - passwords, 313
 - permissions, 310
 - printing, 337–343
 - print titles, 340
 - protecting, 311
 - real-time data, 298
 - renaming, 307
 - shapes, 381
 - Sheet1 tab, 302
 - sheet references in cells, 402–404
 - SmartArt, 381
 - splitting, 377
 - viewing, 334–336
- Sheet View, 478
- Sheet View group, 334
- Show Formulas command, 384
- Solver, 519–522
- sorting, 468
- Split command, 377
- status bar, 302
- Style dialog box, 361
- styles, 362
- Styles group, 360–361
- subtotals, 483
- tables, 461
 - AutoFilter, 470–473
 - AutoFilter Search box, 471
 - columns, 462
 - Create Table dialog box, 464
 - creating, styles, 464–465
 - criteria range, filters and, 476
 - custom sheet views, 478–479
 - data forms, 479–480
 - data tables, 511
 - defining ranges, 463–464
 - External Table Data group, 466
 - fields, 462
 - Filter command, 479
 - filtering, 470–471
 - filters, advanced, 475–478
 - Format as Table command, 463
 - queries, 490–494
 - slicers, 474–475
 - Sort commands, 467
 - Sort dialog box, 468–469
 - sorting, 467–468
 - Table Design Tools, 465–466
 - Table Styles gallery, 464
 - web tables, importing, 486
- templates
 - Blank Workbook, 299
 - data arrangement, 306
 - listing, 299
 - new workbook, 304
 - Office.com, 304–306
- text
 - alignment, 346
 - entry, 318
 - fonts, 345–346
 - formatting, 345–348

- orientation, 345, 348
- wrapping, 370–371
- text files, importing, 486–487
- themes, 357
- Themes gallery, 357
- time, 320
- values, 318–319
- View tab, 334
- vlookup function, 10
- Watch Window, 420
- web tables, importing, 486
- what-if analysis, 510–511
 - Goal Seek, 510
- Wolfram and, 10
- workbooks
 - inserting sheets, 306–307
 - new, 303
 - new, blank, 304
 - permissions, 310
 - protecting, 309, 311
 - recovering unsaved, 317
 - template, 304
- Workbook Views, 334
- Workbook Views group, 335
- Zoom command, 336
- Excel for the Web, 11**
- Excel Online, 112–116**
- Exchange ActiveSync, 671–672, 732**
- Exchange Server**
 - email accounts, 676
 - Exchange before 2013, 677
 - Outlook, 673
 - account management, 732
 - configuring, 682–684
 - email address validity, 707
 - Exchange ActiveSync, 671–672
 - recalling messages, 720
- Export command (Backstage), 30**
- exporting data, Outlook, 687, 689**
- Export page (Backstage), 53**

F

- Feedback command (Backstage), 31**

- field codes (Word)**

- mail merge, 245
- TOC creation, 264–266
- viewing, 271

- Field dialog box, 177–178**

- fields**

- Contact (Outlook), 775–776
- mail merges (Word), 240
- Word
 - date, 252
 - Field Names list, 252
 - form controls, 254
 - inserting, 253
 - page numbers, 252

- file compression**

- image files, 81
- lossless, 81
- lossy, 81
- resolution, 82

- File Explorer, 60**

- libraries, 60
- New Folder button, 61
- Search box, 63

- file formats, 49**

- blocked, 798
 - security and, 807–809
- .bmp (bitmap), 70, 852
- compatibility, 49
- conversion utilities, 49
- converting, 53–54
- Excel, 50
- .gif (Graphics Interchange Format), 70, 852
- HTML files in email messages, 705, 708
- .jpg (Joint Photographic Experts Group), 70, 852
- PDF files, 51
- pictures, 82, 180
 - .bmp (bitmap), 70, 81
 - .gif (Graphics Interchange Format), 70, 81

.jpg (Joint Photographic Experts Group), 70, 81

.png (Portable Network Graphics), 70, 81, 852

.tif (Tagged Image File Format), 70, 81

.wmf, 81

Plain Text files, email messages, 705, 708

PowerPoint, 50

Publisher, 50

Rich Text files, email messages, 705, 708

.tif (Tagged Image File Format), 70, 852

web pages, 53

.wmf (Windows Metafile), 852

Word, 50

XML (eXtensible Markup Language), 49

file management, 59–60

files

access, 66

creating

Start screen, 56

templates, 58

themes, 58

digital signatures, 66

DRM (Digital Rights Management), 66

Editing, restricting, 65–66

macro-enabled, 907

message attachments (Outlook), 715

opening, 131

passwords, 65

Protect Document settings, 65

Add A Digital Signature, 66

Always Open Read-Only, 65

Encrypt with Password, 65

Mark as Final, 66

Restrict Access, 66

Restrict Editing, 65–66

read-only, 65

Recovered Unsaved File, 63

saving

as different file type, 52–53

AutoRecover and, 62

Default Local File Location box, 56

location, 55–56

options, 55–56

to cloud, 101

to OneDrive, 103

to OneDrive for Business, 103

searches, 63

templates, 56–57

text

importing to Excel, 486–487

inserting in Publisher, 851–852

themes, 57

versions, 62

AutoRecover and, 62

Manage Document (Word), 62

video, PowerPoint, 639

file sharing, 6

between applications, 887

Check For Issues button, 67

files saved to cloud, 104–106

PDF files, 51

Word

older versions, 107

private copies of shared documents, 11

XPS (XML Paper Specification) format, 51

Files (Teams), 9

File tab

Backstage, 28

Excel Online, 113

PowerPoint Online, 118

Word Online, 107

fills

Excel, 362

PowerPoint, 574

Publisher, 846

filters

Outlook messages, 724

tables (Excel), 470–478

financial functions (Excel), 405–406

Find And Replace (Excel), 371–373

Find And Replace dialog box, 139

firewalls, 798

flat file databases, 462

folders, 59–61**fonts**

- Excel, 345–346, 357, 362
- OpenType, 142, 146
- PowerPoint, 557, 573
- proportional, 142
- Publisher, 847
- themes, 170, 718
- Word, 132, 142–143, 146
- Word Online, 109

footers

- Excel, 342–343
- PowerPoint, 576–577
- Publisher, 870–871
- Word, 172–179

footnotes (Word), 269, 278–279**Forecast Sheet (Excel), 523–524****Format tab**

- SmartArt, 79–80
- Word, 185

formatting

- character formatting, 141
- paragraph formatting, 141
- templates, 132

forms (Word), 254**Formula dialog box, 226****G****galleries, 20**

- Excel, 357–359
- Header, 174
- PowerPoint, New Slide, 536
- Number Format, 350
- Paragraph Spacing, 171
- Picture Styles, 83
- Quick Analysis, 438
- Shapes, 71
- Style Set, 170
- Table of Contents, 260
- Themes, 169, 571
 - Excel, 357

.gif (Graphics Interchange Format), 81, 852

- PowerPoint, 11

Gmail calendar (Outlook), 687**Goal Seek (Excel), 518–519****Google email accounts, 676****grammar checking**

- PowerPoint, 643
- Word, 194
- Word Online, 111

graphics, 69

- benefits, 69
 - copyright laws, 70
 - Excel Online, 115
 - Excel sheets, 381–382
 - HTML email, 806
 - icons, 71
 - online pictures, 70
 - PowerPoint, 585–586
 - 3D models, 586
 - charts, 586
 - icons, 586
 - Online Pictures, 590
 - photo album, 591–593
 - pictures, 586–589
 - screenshots, 586
 - shapes, 586
 - SmartArt, 586, 596, 599–600
 - stock images, 586, 589–590
 - Word Art text boxes, 587
 - Publisher, 852–856
 - ribbon, Insert tab, 71
 - Screen Clipping tool, 93
 - screenshots, 93–94
 - shapes, 71
 - SmartArt, 69, 71
 - diagrams, 69
 - gallery, 75–76
 - lists, 75
 - stock images, 70
 - WordArt, 71
- graphics card requirements, 15**

Graphics Manager (Publisher), 840

gridlines (PowerPoint), 546

grouping shapes, 90

H

handouts (PowerPoint), 576

hard drive requirements, 14

hardware requirements, 14

Header & Footers Tools Design tab (Word), 175

Header gallery, 174

headers

Excel, 342–343

PowerPoint, 576–577

Publisher, 870–871

Word, 172–179

headings (Word), 269

Help system, 16–17

hex color codes, 297

Home command (Backstage), 29

Home tab

Clipboard group, 20

PowerPoint Online, 118

Style group, 25

Home window, Start screen, 129

horizontal scrollbar, 24

HTML documents (Publisher), 830

HTML email, 806–807

HTML files in email messages, 705, 708

hyperlinks

PowerPoint, 608–609

table of contents (TOC), 262

I

iCalendar (Outlook), 687

icons, 71

bulleted lists, 596

PowerPoint, 586, 595

Illustrations group

Excel, 71

Word, 71

images, 69

clip art, 74

compressing, 85

Creative Commons license, 74

cropping, 86

Excel sheets, 381–382

files, compression, 81

HTML email, 806

Online Pictures command, 74

Publisher, 852–856

resolution, 82

stock images, 10, 70, 129

text layout around, 88

Word, 182–187, 266–267

Images and Illustrations (PowerPoint), 72

IMAP (Internet Message Access Protocol), 677, 732

IMAP protocol, email, 672

Immersive Reader view (Word Online), 106

Import/Export (Outlook), 687

Import/Export button, 34

importing data to Outlook, 687–689

indexes (Word), 271–273

Info command (Backstage), 30

information functions (Excel), 416

Insert Chart dialog box (Word), 184

insertion point, Word documents, 138

Insert Picture dialog box, 72, 82

Insert Shapes group (Shape Format tab), 92

Insights task pane, 23

Inspect Document option, 67

installation, Microsoft 365, 15

interface

application window, 22–24

Contextual tabs, 21

customizing, 31

galleries, 20

Home tab, 20

ribbon, 19

Internet email, 672–673

ISP (Internet Service Provider), 672

italic text

- PowerPoint, 556
- Word, 126

J–K

Journal (Outlook), 691

.jpg (Joint Photographic Expert Group), 81, 852

keyboard, text selection, 140

L**labels**

- Excel, 318–319
- Word, 234–235, 251–252

landscape orientation, 156, 863

Language group (Review tab), 19

Language options, 38

Layout tab (Word)

- Breaks, 228
- Columns dialog box, 226–227
- Page Setup group, 155–157

libraries, 60

- creating, 61
- File Explorer, 60
- Function Library (Excel), 397–399
- Pictures, 72
- Stock Images, 72–73, 183

licensing, 12–13

line charts, 184

line spacing

- Word, 146–149
- Word Online, 110

linking objects between applications, 891

- Object command, 894–895
- Paste Options gallery, 893–894
- Paste Special, 891–892

links

- breaking, 895–897
- copying, sharing from cloud, 106
- text boxes (Publisher), 848–851

- updating, 895–897
- web tables to Excel, 486

Links dialog box, 896–897

lists, SmartArt, 75

Live Preview, 25

logarithmic scale, chart axes, 449

lossless compression, 81

lossy compression, 81

M

M4A files, 626

macros, 903–905

- button, Quick Access Toolbar, 912–913
- commands, 910–911
- creating, 910–911
- Developer tab, 910–911
- digitally signing, 917–920
- editing, 915–916
- enabling, Trust Center, 905–906
- Excel, saving, 909
- macro-enabled files, 907
- naming conventions, 911
- Normal template, 913
- Outlook, 910
- PowerPoint, 910
- Publisher, 910
- recording, 911–912
- running, 914
- saving, 909–910
- VBA Editor, 915–917
- VBA (Visual Basic for Applications), 905
- viruses, 906
- Word, 909

mail merges (Publisher), 877–880

mail merges (Word), 236–238

- address block, 245
- commands, 238–239
- Compete The Merge, 250
- document type, 237
- envelopes, 251–252
- fields, 240

- greeting line, 246
- labels, 251–252
- Mail Merge Wizard, 237–238
- merge fields, 245–247
- Outlook Contact list, 241
- Outlook Contacts, 787
- previewing, 249
- recipient list, 238–245
- records, 240
- Rules, 248–249

Mail Options window (Outlook), 737–738**mail-related documents (Word), 231**

- address block, 245
- Complete The Merge, 250
- envelopes, 232, 234
 - merged, 251–252
- greeting line, 246
- labels, 234–235
 - merged, 251–252
- mail merges, 236–239
- mass mailings, 236–238
 - Contacts list, 236
- merge fields, 245–247
- merge preview, 249
- merge rules, 248–249
- Outlook Contact list, 241
- recipient list, 240–245

malware software, 798–799

- HTML email, 806

margins

- Excel, 337
- Word, 132, 155

master documents (Word), 257, 290, 294

- inserting existing documents, 293–294
- Outline view, 290–291
- subdocuments, 292–293

master pages (Publisher), 838, 868–872**meeting requests (Outlook), responding to, 793–794****Meetings (Teams), 9****memory requirements, 14**

- menus, shortcut menus, 23

Merge Shapes command, 90–91**Microsoft 365**

- account, 732
- email accounts, 676
- installation, 15, 670
- Office Home & Student, 13
- purchasing, 13
- subscription, 5

Microsoft 365 Business premium, 14**Microsoft 365 Business standard, 14****Microsoft account**

- Excel, 299
- OneDrive and, 97

Microsoft Azure Information Protection, 14**Microsoft Defender Application Guard, 129****Microsoft ID, 15****Microsoft Intune, 14****Microsoft Office subscriptions, 13****Microsoft Power BI, Excel and, 10****Microsoft Query, 490–494****Microsoft SQL Server, 461****Microsoft Teams, 9, 12****MIDI (Musical Instrument Digital Interface) files, 626****Mini Toolbar (Word), 145****modern comments, 6****monofont type, 142****mouse**

- text selection, 140
- Word documents, 138

MP3 files (Moving Picture Experts Group), 626**MP4 files, 626****Music library, 60****N**

- naming system, folders, 59

- navigating documents (Word), 137–139

- Navigation bar (Outlook), 690–692

- Navigation pane (Word), 189–190

- New command (Backstage), 29

new features, 8

New Group button, 34

New page (Backstage), 58

Excel, 113

Word, 132

New Slide dialog box, 119

New Tab button, 34

Normal template

macros, 913

Word, 132

note pages (PowerPoint), 576

notes (Excel), 356

numbered items, 75

PowerPoint, 551–552, 556

Word, 162, 164, 269

O

Object command, linking objects, 894–895

objects, PowerPoint slides, 542, 606–607

ODBC (Open Database Connectivity), 491

Office, perpetual version, 5

Office 365 Family, 13

Office 365 Personal, 14

Office.com (Excel), 304–306

Office for the Web, 7

Office Home & Student, 13

Office Presentation Service, 658

OLAP (Online Analytical Processing), 494

OLE (object linking and embedding), 888–890

editing linked objects, 897–898

embedding objects, 898–901

linking objects, 891–895

linking versus embedding, 890

links, breaking, 895–897

Links dialog box, 896–897

OneDrive, 8, 59

as default location, 102

Excel, 299

Microsoft account and, 97

Microsoft ID and, 15

Online Pictures dialog box, 74

paid versus free version, 98

Personal Vault, 99

Personal version, 98

pictures, 73, 181

PowerPoint presentations, 665

saving files to, 103

SharePoint and, 104

Word, new files, 107

OneDrive for Business, 8, 103

Online apps, 7, 97

browsers, 99

Excel, 112–116

file saving to cloud, 101, 103

location, 99–100

PowerPoint, 117

PowerPoint Online, 98

viewers, 100

Wi-Fi and, 100

Word, 100, 106–112

Online Pictures, 70, 74

Creative Commons license, 71

Excel sheets, 381

PowerPoint, 590

Online Pictures browser (Word), 183–184

Open command (Backstage), 29

OpenType fonts, 142, 146

Open window, Start screen, 129

Open window (Word), 131

operator precedence, Excel formulas, 390–391

Options command (Backstage), 31

Options window, 38, 55

Organizer window (Word), 206

.ost (Offline Store) files, 682

outlines

Excel, 480–482

PowerPoint slides, 542

Word, 290–294

Outline view (Word), 190, 192

Outlook, 12

- account management
 - account setup, 674
 - adding accounts automatically, 735
 - adding accounts manually, 735–736
 - Exchange ActiveSync, 732
 - Exchange Server, 732
 - IMAP account, 732
 - Microsoft 365 account, 732
 - Outlook.com, 732
 - POP3 account, 732
 - settings, editing, 734
- Address Book, 706
- Address Book dialog box, 706
- address validity, 707
- Advanced Setup window, 676
- application window, 690–691
- Archive, 702
- archiving
 - AutoArchive, 819–822
 - manual, 822–823
- Arrangement commands, 724
- Attached box, 715
- Attach Item command, 716
- attachments, 715–716
 - blocked file formats, 807–809
 - business cards, 716
 - calendars, 717
 - files, 715
 - Outlook items, 716
 - saving, 728–729
 - security, 807–810
- Attachments tab, 728–729
- Automatic Replies command, 824–826
- Backstage, log in, 800
- blocked files, 798
- blocked senders, 813
- Calendar, 691
 - appointment reminders, 744
 - appointment scheduling, 743–747
 - Contacts, meetings, 789–790
 - Date Navigator, 740
 - Day view, 740–741
 - editing meetings, 792–793
 - Email Calendar option, 754
 - emailing calendars, 754–755
 - emailing items, 754
 - event scheduling, 746–747
 - meeting location, 790–791
 - meetings, responding to requests, 793–794
 - Month view, 741
 - multiple, viewing, 752–753
 - My Calendars list, 739
 - navigating, 739–743
 - opening shared calendars, 752
 - Options window, 757
 - Overlay, 753
 - Publish Online feature, 755
 - publishing calendars online, 755–756
 - Schedule view, 742
 - Scheduling Assistant, 758, 791–792
 - ScreenTips, 740
 - searching, 748–750
 - sharing calendars, 750
 - sharing invitations, 750, 752, 756
 - time scale, 742
 - time zones, 743–744, 758
 - viewing meetings, 792–793
 - weather, 741
 - Week view, 741
 - work time, 757
 - Work Week view, 741
- Calendar pane, 702
- calendars
 - Gmail, 687
 - iCalendar, 687
 - opening files, 687
- categories, 695–696
- Check Names dialog box, 708
- command sets, 705
- Compose Messages options, 737

- configuring, 673
 - Exchange Server, 682–684
- Contacts, 691, 769
 - Actions group, 787
 - Arrangement group, 771
 - associating with messages, 714
 - business card attachments, 716
 - business cards, editing, 777–778
 - Business Card view, 770
 - Card view, 770
 - categories, 779
 - Communicate commands, 786
 - Communicate group, 785
 - Contact dialog box, 772
 - creating, 772–776
 - Edit Business Card dialog box, 778
 - editing, 776–777
 - entering details, 774
 - fields, additional, 775–776
 - fields, business cards, 778
 - filing options, 788
 - follow-up flags, 779
 - forwarding, 783–784
 - groups, 781–782
 - index, 788
 - List view, 771
 - mail merges, 236, 241
 - mail merge, Word and, 787
 - mapping address, 780
 - Meeting command, 789
 - meeting location, 790–791
 - meeting scheduling, 789–790
 - meetings, editing, 792–793
 - meetings, Scheduling Assistant, 791–792
 - meetings, viewing, 792–793
 - moving, 787
 - online status, 788
 - options, 788
 - People view, 770
 - Phone view, 771
 - photograph, 788
 - photos, 774
 - printing, 788
 - Search People box, 780
 - sharing, 784–785
 - sorting, 771
 - tagging, 779
 - Tags group, 779
 - vCards, 783
 - Contacts folder, searching, 780–781
 - Conversation Cleanup options, 737
 - Conversation History, 702
 - Data File dialog box, 683
 - data files, 680–681
 - folder, 682
 - .ost (Offline Store) files, 682
 - .pst (personal storage file) files, 682
 - repairing, 685–686
 - data sharing, 901–902
 - Deleted Items, 702
 - Details pane, 722
 - dictation toolbar, 11
 - Drafts, 702
 - email
 - calendar items, 754
 - focused, 693
 - email accounts, 670–677
 - settings, 680
 - email rules, 814–819
 - Exchange ActiveSync, 671–672
 - Exchange Server, 673
 - exporting data, 687–689
 - Find dialog box, 707
 - Focused Inbox, 703, 722
 - Follow Up, 709
 - forwarding messages, 728
 - Import/Export command, 687
 - importing data, 687–689
 - Inbox, 702–703, 722
 - Inbox Repair Tool dialog box, 686
 - international filter, 813
 - Junk, 730

- Junk command, 810–811
- Junk Email, 702, 810–813
- macros, 910
- Mail folder, 701
- Mail Merge Contacts options, 787
- Mail Options window, 737–738
- MailTips options, 737
- Message Arrival options, 737
- Message Format options, 738
- messages
 - attachments, 704
 - categories, associating, 714
 - contacts, associating, 714
 - conversation cleanup, 730
 - creating, 704–705
 - deleting, 729–730
 - delivery options, 712–713
 - downloading, 721
 - file formats, 708
 - filtering, 724
 - flags, 709–710
 - ignoring, 730
 - importance, 709–710
 - moving, 731
 - printing, 731
 - recalling, 720–721
 - saving sent, 712
 - sending, 720
 - sensitivity level, 710–711
 - stationary, 718
 - themes, 718
 - time sent, 712
 - translating, 729
 - types, 705
- Navigation bar, 690–692
- Navigation Options dialog box, 692
- New Email command, 704
- Open Calendar command, 687
- Outbox, 703
- Outlook Panes group, 737
- People, Address Book, 706
- People pane, 702
- personal folders, 684–685
- POP3 accounts, 671–672
- printing, 698–699
- profiles, 677–678
 - creating, 678–679
 - data files, 680, 682
 - loading, 681
 - managing, 679–680
 - multiple, 678
 - Use This Profile, 681
- Properties dialog box, 713–714
- Quick Click command, 779
- Quick Steps, 725, 727
 - creating, 726
 - Done, 725
 - gallery, 725
 - Manage Quick Steps, 726
 - Move To, 725
 - Reply & Delete, 725
- reading messages, 721
 - as conversations, 723–724
 - filtering, 724
 - Inbox organization, 722
 - threaded conversations, 724
- Reading pane, 722
- receipts, delivery, 712
- receipts, read, 712
- reminder follow-ups, 779
- Replies and Forwards options, 737
- replying to messages, 727
- RSS Feeds, 703
- Save Messages options, 737
- Scheduling Assistant, 789
- searches, 696–697, 707
 - Advanced Find, 697
 - search folders, 697–698
- Search folders, 703
- security, 797
 - attachments, 803
 - digital IDs, 804

- digital signatures, 804, 806
- downloads, 803
- email, 803
- encrypted email, 804–806
- HTML email, 806–807
- junk mail, 810–813
- log requirement, 800
- message attachments, 807–810
- password, 799–801
- safe senders, 807
- settings, 801, 803
- Send And Receive command, 720
- Send Messages option, 737
- Sent Items, 702
- Show As Conversations, 723
- signatures, 719–720
- spelling and grammar, 704
- stock images, 670
- Sync Issues, 703
- Tasks, 759–760
 - accepting, 762
 - assigning, 762–763
 - creating, 761–763
 - marking complete, 766
 - moving, 767
 - options, 767–768
 - recurring tasks, 761
 - Task list, 763, 765
 - tasks, 766
 - Tasks folder, 760
 - To-Do Bar, 758
 - views, 763
- Tasks pane, 702
- templates, automatic replies, 826
- text messaging, 784
- Themes command, 718
- To-Do Bar, 701–702
- Tracking group, 711
- Tracking options, 738
- Translator, 669
- Trust Center, 801–803

- updates, 669
- views, 692–695, 703
- View tab, 694
- voice commands, 11
- voting buttons, 711–712

Outlook.com

- account management, 732
- email accounts, 672, 676

P

Page Break command, 110

page breaks

- Excel sheets, 339–340
- Word, 157

page numbers (Word), 178–179

- fields, 252
- TOC and, 258–259

paragraph formatting, 141

- PowerPoint, 558
 - alignment, 558
 - SmartArt, 558
 - text direction, 558

Word, 146–147

- alignment, 147
- double spacing, 149
- exact spacing, 149
- indents, 151–152
- line spacing, 148–149
- multiple spacing, 149
- single spacing, 149–150
- tabs, 152–154

paragraph spacing, themes, 170

Paragraph Spacing gallery, 171

passwords, 799–801

- Excel, 310, 313
- files, 65

Paste options, 40

Paste Options, linking objects, 893–894

Paste Special

- embedding objects, 899–900
- linking objects, 891–892

pattern fills (PowerPoint), 575

PDF documents, 51

Publisher, 830

PowerPoint presentations, 663

People pane (Outlook), 702

perpetual version of Office, 5

Personal Vault, 99

phishing email, 810

photographs in Outlook Contacts, 788

picture fills (PowerPoint), 574

picture placeholders (SmartArt), 77

pictures

artistic effects, 84

Background Removal tool, 86, 88

clip art, 74

color correction, 84

copyright law, 70

corrections, 83

Creative Commons license, 74

cropping, 86

digital, 70

Excel sheets, 381

file compression, 85

file formats, 180

.bmp (bitmap), 70

.gif (Graphics Interchange Format), 70

.jpg (Joint Photographic Experts Group), 70

.png (Portable Network Graphics), 70

.tif (Tagged Image File Format), 70

icons, 71

inserting, 82

Insert Picture dialog box, 72

modifying, 83

OneDrive, 73, 181

online, 70

Online Pictures command, 74

photo file types, 82

Picture Tools Format tab, 74

PowerPoint, 586–593

PowerPoint Online, 120

removing background, 83

screenshots, 71

Search Pictures box, 72

shapes, 71

sizing, SmartArt, 78

stock images, 10, 70, 180

Word, 179–180

Image Search browser, 183

inserting, 180–182

online pictures, 184

Online Pictures browser, 183–184

stock images, 182–184

text and, 186–187

Pictures command, 72, 82

Word, 180–182

Pictures library, 60, 72

Picture Styles gallery, 83

Picture Tools, 181

Picture Tools Format tab, 74, 83

pie charts, 184

Pinned headings, 129

PivotTable reports (Scenario Manager), 517

placeholder text, templates, 133

Plain Text files, email messages, 705, 708

.png (Portable Network Graphics), 81, 852

POP3 accounts, 671–672, 732

POP (Post Office Protocol), 672, 676

portrait orientation, 156

PowerPath, animation, 622

PowerPoint, 12, 529

3D models, 586

access tools, 645

action buttons, 656

Advanced Animation group, 622

animation, 611–614

additional, 624–625

assigning, 615

Effect Options, 619, 623

effects, 615–622

motion path, 616–622

sound effects, 625–627

- timings, 627–628
- triggering, 622
- Animation Exit group, 614
- Animation gallery, 614–616
- Animation Painter, 622, 625
- Animation pane, 628–629
- Animations tab, 614
- Backstage, 101, 532
- bulleted lists, 549, 551, 556
- Bullets and Numbering dialog box, 550, 552
- Bullets gallery, 550
- Chart command, 602–604
- charts, 70, 586, 602–606
- collaboration, 665–666
- Custom Slide Show command, 649
- Effect Option command, 623
- Effects, 562
- Effect tab, 621
- Excel sheets, 319
- Eyedropper tool, 560
- file types, 50
- Font dialog box, 558
- Font group, 557
- footers, 576–577
- Format Shape task pane, 561, 564–566
- GIFs, animated, 11
- grammar checking, 643
- graphics, 585–586
 - 3D models, 586
 - charts, 586
 - icons, 586
 - Online Pictures, 590
 - pictures, 586–589
 - screenshots, 586
 - shapes, 586
 - SmartArt, 586, 596, 599
 - stock images, 585–586, 589–590
 - WordArt text boxes, 587
- gridlines, 546
- guides, 546
- handouts, 576, 659–663
- Header And Footer dialog box, 576
- headers, 576–577
- hyperlinks, 608–609
- icons, 586, 595
- Images and Illustrations, 72
- Insert Picture dialog box, 587
- Layout commands, 567–568
- Layout gallery, 543
- layout masters, 581–582
- Layout tab, 567
- line types, 561
- macros, 910
- Mail Setup dialog box, 680
- New Slide command, 540
- New Slide gallery, 536
- note pages, 576
- notes, 659
 - Notes Master, 661
 - printing, 661, 663
- numbered lists, 551–552, 556
- Numbering command, 552
- objects, 606
 - grouping, 607
 - layering, 607
- Office Presentation Service, 658
- Options window, 538
- Outline view, 541
- Paragraph dialog box, 558
- Paragraph group, 557
- photo albums, 591–593
- pictures, 587–589
- Pictures command, 587
- Picture Tools, 588
- PowerPoint Export tools, 663
- presentations
 - appearance, 539
 - audience considerations, 642
 - copies, 531
 - creating, 530–536
 - creating from existing, 535
 - exporting, 663–664

- from existing, 531
- interactive, 656–658
- PDF file, 663
- place, 642
- planning, 641–642
- printing, 661, 663
- purpose, 642
- run through, 644–645
- saving as template, 538
- self-running, 652–656
- sharing, 665–666
- slideshows, 545
- themes, 535
- viewing during editing, 552–554
- windows, 548
- Presentation Views, 543
 - Normal, 543–544
 - Notes Page, 543–544
 - Outline, 544
 - Reading View, 544
 - Slide Sorter, 544, 549
- Presenter Coach, 645–646
- Presenter view, 646–648
- Proofing option, 643
- quick styles, 559
- Recent list, 535
- Record Slide Show command, 654
- Reuse Slides task pane, 536
- rulers, 546
- screenshots, 586
- Section command, 582
- Set Up Show dialog box, 652
- shape attributes, 559
- Shape Effects, 559–561
- Shape Fill, 559–561
- Shape Format tools, 559
- Shape Outline, 559–561
- shapes, 586, 593–594
 - Effects, 562
 - File or Line options, 561
 - fill, 559–561
 - formatting, 561, 563
- shape styles, 559
- Shape Styles group, 561, 563
- Skype for Business, 658
- Slide Master command, 578
- Slide Master tab, 579–580
- slides
 - black and white, 547
 - Blank option, 540
 - color, 547
 - custom slide show, 649, 651–652
 - deleting, 549
 - from Word outline, 542
 - grayscale, 547
 - hidden slides, 648–649
 - inserting, 540, 542
 - layout modification, 543
 - layout type, 540
 - master slide creation, 579–581
 - master slides, 577–579
 - objects, inserting, 542
 - rearranging, 549
 - reusing, 536
 - sound, 634–635
 - tables, inserting, 566
 - text entry, 541–542
 - Title and Content option, 540
 - Title Slide option, 540
 - video, 636, 639–640
- slide sections, 582, 584
- slideshows, 545
 - recording, 654–656
- Slide Sorter, 582
- SmartArt, 586, 596–601
- smart guides, 546
- Snap Objects To Grid option, 546
- sound, trimming audio, 636
- Start screen, 529
- stock images, 589–590
- Symbol dialog box, 550

- Table Design commands, 568, 570
- Table Design tab, 567
- tables
 - 3D effects, 570
 - formatting, 567–570
 - on slides, 566
- templates, 531–534
- text
 - alignment, 558
 - effects, 564–566
 - fill, 563
 - font attributes, 557
 - outline, 564
 - paragraph attributes, 558
 - SmartArt, 558
 - text direction, 558
 - WordArt, 563
- Text Box command, 556
- text boxes, 559
 - fill, 559–561
 - Fill or Line, 561
 - inserting, 556–557
 - photo albums, 592
 - Word Art, 587
- Text Effects command, 564
- Text Fill command, 563
- Text Options, 564
- Text Outline command, 564
- themes, 570–571
 - applying, 571
 - backgrounds, 574–575
 - colors, 572
 - considerations, 570
 - custom, 575
 - effects, 574
 - fills, 574
 - fonts, 573
 - photo album, 593
 - Variants gallery, 571
- timings, 654
- transitions, 611–614, 630–633
 - Trim Audio command, 636
 - Video Tools, 640
 - Zoom, 651–652
 - zooming, 545
- PowerPoint Designer, 609–610**
- PowerPoint for the Web, 11**
- PowerPoint Online, 98, 117**
 - Designer pane, 117
 - Editing View, 119
 - New Slide command, 119
 - Notes, 119
 - pictures, 120
 - presentations, new, 119
 - ribbon, 98
 - Animations tab, 118
 - Design tab, 118
 - Draw tab, 118
 - File tab, 118
 - Help tab, 119
 - Home tab, 118
 - Insert tab, 118
 - Review tab, 118
 - Slide Show tab, 118
 - Transitions tab, 118
 - View tab, 118
 - Slides, new, 119
 - Slide Show, 119
 - Slide Sorter, 119
 - SmartArt, 120
 - status bar, 119
- Prezi, 540**
- Print command (Backstage), 30**
- printers, Publisher and, 831**
- printing**
 - Outlook, 698–699
 - Contacts information, 788
 - email messages, 731
 - PowerPoint
 - handouts, 661, 663
 - notes, 661, 663
 - presentations, 661, 663

- Publisher, 831, 858–859
- white space and, 831
- Word, 157–159
 - envelopes, 234
- Excel worksheets, 337–343
- Print options, 41**
- processor requirements, 14**
- profiles (Outlook), 677–678**
 - creating, 678–679
 - data files, 680, 682
 - loading, 681
 - managing, 679–680
 - multiple, 678
 - Use This Profile, 681
- Proofing group (Review tab), 19**
- Proofing option (PowerPoint), 643**
- Proofing options, 38**
- proportional fonts, 142**
- Protect Document, 65**
 - Add A Digital Signature, 66
 - Always Open Read-Only, 65
 - Encrypt with Password, 65
 - Mark As Final, 66
 - Restrict Access, 66
 - Restrict Editing, 65–66
- Protect group (Review tab), 19**
- Protect tab, Proofing group, 19**
- .pst (personal storage file) files , 682**
- Publisher, 12, 829–830**
 - advertisements, 858
 - balanced documents, 831
 - baseline guides, 840
 - blank pages, 834
 - borders, 858
 - boundaries, 840
 - Building Blocks group, 857–858
 - Business Information, 834
 - business information set, 841–843
 - Calendars, 857
 - clip art, 856–857
 - Customize pane, 834
 - data merges, 877–882
 - Design Checker, 883–884
 - Drawing Tools
 - Arrange command, 846
 - Insert Shapes group, 845
 - Shape Styles group, 845
 - text boxes and, 845–846
 - Draw Text Box command, 844
 - fields, 840
 - file formats
 - .bmp (bitmap), 852
 - .gif (Graphics Interchange Format), 852
 - .jpg (Joint Photographic Expert Group), 852
 - .png (Portable Network Graphics), 852
 - .tif (Tagged Image File Format), 852
 - .wmf (Windows Metafile), 852
 - Graphics Manager, 840
 - guides, 840
 - Guides gallery, 839
 - Home page, 831
 - HTML documents, 830
 - hyphenation, 882
 - illustrations, 852–856
 - Layout guide, 838
 - macros, 910
 - Mailings tab, 878
 - master pages, 868
 - creating, 871–872
 - footers, 870–871
 - headers, 870–871
 - Layout guide, 838
 - object placement, 869–870
 - Master Page view, 840
 - More Blank Pages option, 834
 - Normal view, 840
 - object alignment, 846
 - object arrangement, 846
 - objects
 - groups, 875
 - layers, 876
 - swapping, 876–877

- Page Design tab, 863–864, 866
 - Page Navigation, 840
 - page settings, 863–864, 866
 - Pages group, 861
 - page size, 864
 - Pages pane, 837, 840
 - PDF documents, 830
 - picture placeholder, 853–854
 - pictures, 852–856
 - clip art, 856–857
 - formatting, 856
 - swapping, 876–877
 - printing, 831
 - printing publications, 858–859
 - print versus electronic publications, 830
 - .pub files, 50
 - publications
 - adding pages, 861–863
 - duplicate pages, 862
 - margins, 863
 - orientation, 863
 - Page Setup group, 863
 - planning, 830–831
 - saving as template, 835
 - viewing, 840–841
 - ribbon, 836
 - Ruler Guides option, 839
 - rulers, 837–838, 840
 - scratch area, 840
 - shapes, 857
 - fills, 846
 - styles, 845
 - wrap points, 845
 - Shapes gallery, 845
 - Spelling feature, 882
 - status bar, 836
 - tables, 872
 - alignment, 874
 - arranging, 874
 - columns, 874
 - Design commands, 872–873
 - Layout commands, 873–874
 - merging cells, 874
 - rows, 874
 - sizing, 874
 - Table Tools, 872–874
 - templates, 831–833
 - blank, 834
 - changing, 866–867
 - creating, 835–836
 - Manufacturers folder, 834
 - More Templates link, 832
 - Publication Types folder, 834
 - saving publication as, 835
 - searching for, 832
 - text boxes
 - alignment, 847
 - creating, 844
 - drawing tools and, 845–846
 - drop caps, 848
 - editing text, 844
 - fonts, 847
 - formatting, 844–846
 - linking, 848–851
 - sizing, 846
 - text size, 847
 - typography, 848
 - WordArt Styles, 848
 - Text Box Tools tab, 846–849
 - text files, inserting, 851–852
 - View shortcuts, 836
 - View tab, 840
 - windows, 841
 - Word documents, inserting, 851
 - XPS documents, 830
 - Zoom, 841
- ## Q
- queries, Excel tables, 490–494**
 - Quick Access Toolbar, 23**
 - Customize Quick Access Toolbar, 28, 35–36
 - customizing, 35–37

- keyboard shortcuts, 28
- macro button, 912–913
- Save button, 53

Quick Analysis gallery, Excel charts, 438

Quick Parts (Word)

- AutoText entries, 196
- building blocks, 197
- Building Blocks Organizer, 177
- footers, 177
- headers, 177

Quick Steps (Outlook), 725–726, 727

Quick Styles (Word), 200–205

Quick Tables, 211

R

radar charts, 184

RAM requirements, 14

Reading view (Word Online), 106

Read Mode (Word), 132

read-only files, 65

Recent headings, Shared With Me list, 129

Recent list, 56

- Pinned headings, 129

recording macros, 911–912

records, mail merges (Word), 240

Recovered Unsaved File, 63

Redo button, 23

relational databases, 462

Rename button, 34

repairing data files, Outlook, 685

Reset button, 34

resolution, file compression and, 82

Resume Assistant (Review tab), 19

Review tab

- Changes group, 19
- Comments group, 19
- Compare group, 19
- Language group, 19
- PowerPoint Online, 118
- Proofing group, 19
- Resume Assistant, 19

Speech group, 19

Tracking group, 19

Word, 193

Word Online, 111

ribbon, 19, 23

Customize Ribbon window, 33

customizing, 32–33

Developer tab, 904–905

Excel Online, 112–116

Insert tab, 71

keyboard shortcuts, 27

minimizing, 26

PowerPoint Online, 98, 118–119

Word, 125, 136

Word Online, 107–112

Ribbon Display Options button, 26

ribbon tabs, 25

Rich Text files, email messages, 705, 708

RSS Feeds (Outlook), 691

ruler, 24, 32

PowerPoint, 546

Publisher, 837–838

Word, 151, 153

running macros, 914

S

Save As command (Backstage), 30

Save As dialog box, 52

Change File type option, 54

file type conversion, 53

folders, 60

Save As Type drop-down, 52

Save button, 23

Save command (Backstage), 30

Save This File dialog box, 104

saving files

as different file type, 52–53

AutoRecover and, 62

Default Local File Location box, 56

location, 55–56

options, 55–56

- Quick Access Toolbar, 53
- web page formats, 53
- scanpst.exe file, 685**
- Scenario Manager (Excel), 511, 514–518**
- Scheduling Assistant (Outlook), 791–792**
- Screen Clipping tool, 93–94**
- screenshots, 71, 93–94, 586**
- scrollbars, 24**
- Search box, 5**
- searches**
 - Bing and, 6
 - Calendar (Outlook), 748–750
 - closing, 17
 - Excel, 302
 - File Explorer, 63
 - files, 63
 - functions (Excel), 396
 - Get Help On area, 17
 - Help and, 16
 - Open dialog box, 64
 - Outlook, 696–698, 703, 707, 780–781
 - Tell Me What You Want To Do, 4
 - templates
 - Publisher, 832
 - PowerPoint, 532–533
 - Word, 195
- Search Pictures box, 72**
- security**
 - blocked files, 798
 - Defender, 799
 - digital IDs, 804
 - Excel, 310, 362
 - Excel workbooks, 309
 - firewalls, 798
 - Outlook, 797, 800–813
 - passwords, 799–801
 - phishing, 810
 - software, 798–799
 - Trust Center, 45
 - Trusted Locations list, 46–47
 - Trusted Publishers list, 45
 - viruses, 798–799
 - web beacons, 807
- Send Link dialog box, 105**
- Shape Format command, 91, 93**
- Shape Format tab**
 - Accessibility group, 92
 - Arrange group, 92
 - Insert Shapes group, 92
 - Shape Styles group, 92
 - Size group, 92
 - Text group, 92
 - WordArt Styles group, 92
- shapes, 69**
 - Excel sheets, 381
 - grouping, 90
 - inserting, 71, 88
 - multiple, 89–91
 - PowerPoint, 586, 593–594
 - formatting, 561, 563
 - Publisher, 857
 - fills, 846
- Shapes command, 88**
- Shapes gallery, 71, 88**
 - multiple shapes, 89–91
 - PowerPoint, 593
- Shape Styles group (Shape Format tab), 92**
- Share command (Backstage), 30**
- SharePoint, OneDrive for Business, 8**
- sharing data (Outlook), 901–902**
- sharing files, 8**
 - saved to cloud, 104–106
 - Word, older versions, 107
 - workbooks in cloud, 105
- shortcut menus, 23**
- Show/Hide command (Word), 141**
- signatures, email (Outlook), 719–720**
- Size group (Shape Format tab), 92**
- Skype for Business, 658**
- slicers (Excel), 474–475, 502**
- SmartArt, 71**
 - Cycle category, 75
 - Design tab, 79, 601

- diagrams, 75–77
- Excel sheets, 381
- Format tab, 79–80, 601
- gallery, 76
- Hierarchy category, 76
- inserting, 76–78
- Layouts gallery, 79
- List category, 75
- lists, 75
- Matrix category, 76
- modifying, 79, 81
- Office.com category, 76
- Picture category, 76
- picture placeholders, 77
- PowerPoint, 558, 586, 596–601
- PowerPoint Online, 120
- Process category, 75
- Pyramid category, 76
- Relationship category, 76
- sizing, 78
- Text pane, 77
- WordArt Styles gallery, 80, 602

SmartArt command, 76–78**SmartArt graphics, 69****SMTP (Simple Mail Transport Protocol), 672****Solver (Excel), 519–522****sound (PowerPoint), 634–635**

- animations (PowerPoint), 625
- editing options, 635
- Trim Audio command, 636

Source Manager, 276–277**sparklines (Excel), 366****Speech group (Review tab), 19****spelling**

- Editor (Word), 192
- email messages, 704
- Publisher, 882
- Word, 194
- Word Online, 111

SQL Server databases, connecting to, 488**Start menu (Word), 128****stationary, email (Outlook), 718****statistical functions (Excel), 409–410****status bar, 24**

- customizing, 37
- Excel, 302
- PowerPoint Online, 119

stock images, 70, 129

- Outlook, 670
- PowerPoint, 585–586, 589–590
- Word, 182–184

Stock Images library, 10, 72–73, 180, 183**Style group, 25****styles**

- Excel, 360–362
- PowerPoint backgrounds, 574
- shapes (Publisher), 845
- templates, 134
- Word, 142, 200
 - built-in, TOC and, 259–260
 - creating, 171
 - custom, TOC and, 261–262
 - editing, 203–204
 - managing, 204–207
 - Quick Styles, 200
 - Quick Styles gallery, 201–202
 - tables, 220–222, 223
 - TOC and, 258–262

Style Set gallery, 170**Styles window, 203****subscriptions, 12–13**

- Microsoft 365, 5
- Microsoft 365 Business premium, 14
- Microsoft 365 Business standard, 14
- Office 365 Family, 13
- Office 365 personal, 14

T**tab groups, 35****Table Design tools (Word), 216**

- alignment, 219
- cell format, 219–220

- columns, 217–218
- merge cells, 219
- rows, 217–218
- styles, 220–223
- text direction, 220
- Table Of Contents gallery, 260**
- table of contents (TOC)**
 - adding entries, 263
 - field codes, 264–266
 - generating, 265
 - hyperlinks, 262
 - inserting, 261
 - page numbers, 258–259
 - previewing, 262
 - styles, 258–262
 - Table of Contents dialog box, 261
 - updating, 263
 - Word, 258
- table of figures (Word), 267–268**
- Table Tools (Word Online), 110**
- tables (Excel), 461**
 - AutoFilter, 470–473
 - AutoFilter Search box, 471
 - Create Table dialog box, 464
 - creating, styles and, 464–465
 - data forms, 479–480
 - data tables, 511
 - External Table Data group, 466
 - Filter command, 479
 - filtering, 470–471
 - advanced, 475–478
 - criteria range, 476
 - slicers, 474–475
 - Format As Table command, 463
 - pivot tables, 494–495
 - creating, 497, 499–500
 - Design tab, 501
 - PivotTable Analyze tab, 500–501
 - Recommended Pivot Tables, 496–497
 - slicers and, 502
 - queries, 490–494
 - ranges, 463–464
 - sheets, custom views, 478–479
 - Sort commands, 467
 - Sort dialog box, 468–469
 - sorting, 467–468
 - sort order, 467
 - Table Design Tools, 465–466
 - Table Styles gallery, 464
 - web tables, importing, 486
- tables (PowerPoint)**
 - 3D effects, 570
 - formatting, 567–570
 - in slides, 566
- tables (Publisher), 872**
 - alignment, 874
 - arranging, 874
 - columns, 874
 - merging cells, 874
 - rows, 874
 - sizing, 874
 - Table Tools, 872–874
- tables (Word)**
 - alignment, 219
 - AutoFit, 212
 - captions, 266–267
 - cell format, 219–220
 - column width, 212
 - converting text to, 211, 214
 - design, 126
 - drawing, 210, 213
 - Excel spreadsheet, 211
 - formulas, 225–226
 - inserting, 210–213
 - layout, 126
 - merge cells, 219
 - navigating, 214
 - positioning, 215–216
 - Quick Tables, 211
 - selecting, 215–216
 - sorting data, 224
 - styles, 220–223

Table Design tools, 216–220

Table Drawing tool, 213

table grid, 210

text deletion, 214

text direction, 220

text entry, 214

tables (Word Online), 110

tabs

Contextual tabs, 21

custom, 34

ribbon tabs, 25

Word, 153–154

Tabs list, 34

task panes, 23

Tasks (Outlook), 702, 759–760

accepting, 762

assigning, 762–763

creating, 761–763

editing, 766

marking complete, 766

moving, 767

options, 767–768

recurring tasks, 761

Task list, 763, 765

Tasks folder, 760–763

To-Do Bar, 758

views, 763

TCP/IP (Transport Control Protocol/Internet Protocol) port, 797

Teams channel (Teams), 9

Tell Me What You Want To Do search box, 4

Template And Add-in dialog box, 136

templates, 56–58

Excel

Blank Workbook, 299

data arrangement, 306

data validation and, 509

listing, 299

new workbook, 304

Office.com, 304–306

formatting, 132

New window, 130

Normal, macros, 913

Outlook, automatic replies, 826

placeholder text, 133

PowerPoint, 531–534

Blank Presentation, 532

creating, 537–539

previewing, 534

saving presentations as, 538

searches, 532–533

Publisher, 831–833

blank, 834

changing, 866–867

creating, 835–836

Manufacturers folder, 834

More Templates link, 832

Publication Types folder, 834

searching for, 832

sample text, 133

styles, 134

Word, 130, 132

attaching to documents, 136

creating, 134–136

folders, 135

Normal, 132

themes, 169

Word Online, 107

text

Excel, 318

alignment, 346

fonts, 345–346

formatting, 345–348

functions, 414–415

importing files, 486–487

orientation, 345, 348

wrapping, 370–371

PowerPoint

alignment, 558

converting to SmartArt, 600

effects, 564–566

fill, 563

font attributes, 557

- outline, 564
- paragraph attributes, 558
- quick styles, 559
- shape attributes, 559
- SmartArt, 558
- text box fill, 559–561
- text box formatting, 559
- text direction, 558
- WordArt, 563
- Publisher
 - drop caps, 848
 - editing in text boxes, 844
 - fonts, 847
 - formatting text boxes, 844–846
 - liking text boxes, 851
 - linking, 848
 - linking text boxes, 849–850
 - size, 847
 - text box creation, 844
 - Text Box Tools tab, 846–849
 - typography, 848
 - WordArt Styles, 848
- selecting
 - keyboard, 140
 - mouse, 140
- slides (PowerPoint), 541–542
- templates, 133
- text boxes (PowerPoint)
 - inserting, 556–557
- Word
 - converting to a table, 214
 - tables, 214, 220
- WordArt, 94–95
- text boxes**
 - PowerPoint
 - hyperlinks, 608
 - photo album, 592
 - Word Art, 587
 - Publisher
 - alignment, 847
 - creating, 844
 - drawing tools and, 845–846
 - drop caps, 848
 - editing text, 844
 - fonts, 847
 - formatting, 844
 - linking, 848–851
 - sizing, 846
 - Text Box Tools tab, 846–849
 - text size, 847
 - typography, 848
 - WordArt Styles, 848
- Text Effects gallery, 95**
- Text group (Shape Format tab), 92**
- Text pane (SmartArt), 77**
- texture fills (PowerPoint), 574**
- themes, 57–58**
 - color, 170
 - default, 170
 - Document Formatting group, 170
 - effects, 170
 - email (Outlook), 718
 - Excel, 357
 - fonts, 170
 - paragraph spacing, 170
 - PowerPoint, 535, 570–575
 - photo album, 593
 - Save As dialog box, 169
 - style sets, 170
 - templates, 169
 - Word, 142, 168–172
 - deleting, 172
 - email, 718
 - Save Current Theme dialog box, 172
- Themes gallery, 169**
 - Excel, 357
 - PowerPoint, 571
- .tif (Tagged Image File Format), 81, 852**
- time**
 - Calendar (Outlook), 758
 - Excel, 320
- title bar, 22**

titles (Excel), 338
To-Do Bar (Outlook), 701–702
Track Changes (Word Online), 111
Tracking group (Review tab), 19
Transform command (Backstage), 30
Transitions tab (PowerPoint Online), 118
Translate (Word Online), 111
Translator (Outlook), 669
Trojan horses, 799
TrueType fonts, 142
Trust Center, 43
 accessing, 906
 macros, 905–906
 opening, 43
Trust Center (Outlook), 801–803
Trusted Locations list, 46–47
Trusted Publishers, 45
typography, text boxes (Publisher), 848

U

Undo button, 23
updates, 4, 128

V

VBA (Visual Basic for Applications), 905, 908
 macros
 editing, 915–916
 saving, 909–910
 stepping through, 916–917
 modules, 908
vCards (Outlook), 783
vertical scrollbar, 24
video (PowerPoint), 636
 online video, 636
 slides
 files, inserting, 639
 modifying clips, 640
Videos library, 60

views (Outlook), 692, 703
 advanced settings, 695
 Change View command, 693
 creating, 694
 custom, 694
 Focused Inbox, 692–693
 sorting, 703
 types, 694
 View tab, 694
View tab (Word), 187–189
View tab (PowerPoint Online), 118
View tab (Word Online), 112
viruses
 macros, 906
 software, 798–799
vlookup function (Excel), 10
voice commands (Outlook), 11
voting buttons (Outlook), 712

W

Watch Window (Excel), 420
.wav (Waveform Audio) files, 625
Web apps, 8
 Excel for the Web, 11
 PowerPoint for the Web, 11
web beacons, 807
WebDAV (Web Distributed Authoring and Versioning), 756
what-if analysis (Excel), 510–511
white space, 155
 printing and, 831
Wi-Fi, Online apps and, 100
Window group (Word), 187
windows
 Options, 55
 Options window, 38
 resizing, 774
Windows Defender Security Center, 798
Windows Reader, PDF files, 51
.wma (Windows Media Audio) files, 626
.wmf (Windows Metafile), 81, 852

Wolfram, Excel and, 10**Word, 12**

- AutoCorrect, 199
- Backstage (Print window), 157–159
- bibliographies, 274–278
- blank documents, 130
- bookmarks, 269, 288–289
- borders, 166–168
- building blocks, 197
- bulleted lists, 162, 164
- captions, 266–267
- character formatting, 142
- Chart Design tab, 185
- charts, 179–186
- citations, 274–277
- collaboration, 128
 - private copies of shared documents, 11
- comments, 289
 - contextual view, 128
 - modern comments, 128
- Compare, 285–287
- cross references, 269–270
- date fields, 252
- Developer tab, 136
- Dictation, 127
- document formatting, 140
 - character formatting, 141
 - manual, 142
 - paragraph formatting, 141
 - styles, 142
 - themes, 142
- Document Info command, 175
 - Field dialog box, 177–178
- Document Information, 252
- documents
 - columns, 226–228
 - inserting in Publisher, 851
 - insertion point, 138
 - keyboard, 139
 - large, 257
 - layout, 155
 - Master Document, 290–294
 - mouse, 138
 - navigating, 137–140
 - orientation, 156
 - saving as templates, 135
 - section breaks, 228–230
 - section formatting, 230
 - sections, 257
- document window, splitting, 192
- Editor, 19, 192
 - Grammar checker, 194
 - navigation buttons, 194
 - running, 193
 - spelling, 192
 - Spelling pane, 194
 - Thesaurus task pane, 195
- endnotes, 269, 278
 - inserting, 279
 - moving between, 279
 - number format, 279
 - numbering, 278
 - styles, 278
- Envelopes And Labels dialog box, 232
- field codes
 - TOC building, 264–266
 - viewing, 271
- Field dialog box, 252
- Field Names list, 252
- fields, 252–253
- figures, table of figures, 267–268
- files
 - new from OneDrive, 107
 - opening, 131
 - sharing, older versions, 107
- file types, 50
- Font dialog box, 145–146
- fonts, 132
- footers
 - creating, 172–174
 - inserting, 174–175

- page numbering, 178–179
- tools, 175–178
- footnotes, 269, 278
 - inserting, 279
 - moving between, 279
 - number format, 279
 - numbering, 278
 - styles, 278
- Format tab, 185
- formatting styles, 200
- forms, 254
- Header & Footers Tools Design tab, 175
- headers
 - creating, 172–174
 - inserting, 174–175
 - page numbering, 178–179
 - styles, 174
 - tools, 175–178
- headings, 269
- Home tab, 126
 - Clipboard group, 126
 - Font group, 126, 143
 - Paragraph group, 126
- Illustrations group, 71
- images
 - captions, 266–267
 - Image Search browser, 183
 - stock images, 129, 182–184
 - text and, 186–187
- indents, 146
- indexes, 271–273
- Insert tab, 126
 - Draw Table, 213
 - Page Break, 157
 - Table group, 210–211
- interface, 125
- Label Options dialog box, 235
- macros, 909
- mailings
 - address block, 245
 - Complete The Merge, 250
 - document type, 237
 - envelopes, 232, 234, 251–252
 - Envelopes and Labels dialog box, 234
 - greeting line, 246
 - labels, 234–235
 - mail merges, 236–239
 - Mail Merge Wizard, 237–238
 - mass mailings, 236–238
 - merge fields, 245–247
 - merge preview, 249
 - merge rules, 248–249
 - Outlook Contact list, 241
 - recipient list, 240–245
 - recipients, 238
- Manage document, file versions, 62
- margins, 132, 155
- Mini Toolbar, 145
- multilevel lists, 165–166
- Navigation pane, 189–190
- numbered items, 269
- numbered lists, 162, 164
- Online Pictures browser, 183–184
- Organizer window, 206
- outlines, PowerPoint slides, 542
- Outline view, 190, 192, 290–291, 293–294
- Page Layout view, 132
- page number fields, 252
- Page Setup dialog box, 155–156
- Paragraph dialog box, 146
 - alignment, 147
 - Decrease Indent, 151–152
 - Line and Page Breaks, 150–151
 - Line And Paragraph Spacing, 148–149
 - Tabs, 152–154
- paragraph formatting, 146–147
 - alignment, 147
 - double spacing, 149
 - exact spacing, 149
 - indents, 151–152
 - line spacing, 148–149
 - multiple spacing, 149

- single spacing, 149–150
- tabs, 152–154
- pictures, 179–182
- Picture Tools, 181
- printing, 157–159
- Proofing Options, 193
- Quick Parts, 196
- Read Mode, 132
- Recent list, 129
- ribbon, 125–126, 136
- Ruler
 - indents, 151
 - tabs, 153
- scrollbars, 138
- Search Documents box, 131
- Search feature, 195
- shading, 166–168
- Start menu, 128
- Start screen
 - Home window, 129
 - New window, 129
 - Open window, 129, 131
- styles
 - creating, 171
 - editing, 203–204
 - Manage Styles dialog box, 205
 - managing, 204–207
 - Quick Styles gallery, 201–202
 - TOC and, 258–262
- Styles window, 203
- table of contents (TOC), 258
 - adding entries, 263
 - field codes, 264–266
 - generating, 265
 - hyperlinks, 262
 - inserting, 261
 - page numbers, 258–259
 - previewing, 262
 - styles, 258–262
 - Table Of Contents dialog box, 261
 - updating, 263
- table of figures, 267–268
- tables
 - alignment, 219
 - AutoFit, 212
 - captions, 266–267
 - cell format, 219–220
 - columns, 217–218
 - column width, 212
 - converting text to, 211, 214
 - design, 126
 - drawing, 210, 213
 - Excel spreadsheet, 211
 - formatting, 216–218
 - formulas, 225–226
 - inserting, 210–213
 - layout, 126
 - merge cells, 219
 - navigating, 214
 - positioning, 215–216
 - Quick Tables, 211
 - rows, 217–218
 - selecting, 215–216
 - sorting data, 224
 - styles, 220–223
 - Table Design tools, 216–220
 - Table Drawing tool, 213
 - table grid, 210
 - text deletion, 214
 - text direction, 220
 - text entry, 214
- tabs, 146
- Tabs dialog box, 153–154
- templates, 130, 132
 - attaching to documents, 136
 - Blank Document, 130
 - creating, 134–136
 - folders, 135
 - forms, 254
 - Normal, 132
 - themes, 169

- text formatting, 143
 - bold, 126
 - case, 144
 - effects, 143
 - font color, 126
 - font size, 126, 143
 - fonts, 142
 - images and, 186–187
 - italic, 126
 - typography, 143
 - text selection
 - keyboard, 140
 - mouse, 140
 - themes, 168–172
 - deleting, 172
 - email, 718
 - Track Changes, 280, 282–283
 - accepting, 285
 - comments, 280
 - rejecting, 285
 - reviewing changes, 284–285
 - Reviewing Pane, 282
 - Simple Markup view, 280
 - viewing changes, 283–284
 - View tab, 187–189
 - Word Options window, 901
 - WordArt, 69, 71, 80, 94–95**
 - PowerPoint, 563
 - Smart Art, 602
 - Text Effects gallery, 95
 - styles
 - PowerPoint, 563
 - text boxes (Publisher), 848
 - WordArt Styles gallery, 80**
 - WordArt Styles group (Shape Format tab), 92**
 - Word Count (Word Online), 111**
 - Word for the Web, 7**
 - Word Online, 100, 106, 110**
 - Backstage, 107–108
 - Comments, 111
 - Editor, 111
 - Grammar, 111
 - Immersive Reader view, 106
 - Reading view, 106
 - Ribbon, 107–112
 - Save As page, 107
 - Spelling, 111
 - tables, 110
 - Table Tools, 110
 - Track Changes, 111
 - Translate, 111
 - Word Count, 111
- ## X–Y–Z
- XML (eXtensible Markup Language), 49**
 - XPS (XML Paper Specification) format, 51**
 - Publisher, 830
 - Zoom group (Word), 187**
 - zoom, PowerPoint, 545, 651–652**