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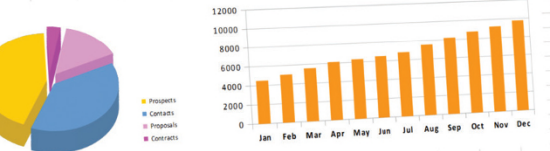
Microsoft®

# Office® 2021 for Macs®

for  
**dummies**®  
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heets

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Collaborate with other  
Microsoft Office users

Discover the shortcuts  
that make working easier

Create spreadsheets, slide  
decks, and documents

**Bob "Dr. Mac" LeVitus**

Healer of Macs

**Dwight Spivey**

Mac fan who loves Office





# Microsoft<sup>®</sup> Office<sup>®</sup> 2021 For Macs<sup>®</sup>

**by Bob LeVitus**

*Houston Chronicle* "Dr. Mac" columnist

**and Dwight Spivey**

for  
**dummies<sup>®</sup>**  
A Wiley Brand

## Microsoft® Office® 2021 For Macs® For Dummies®

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# Introduction

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**Y**ou made the right choice twice: Microsoft Office for Mac and this book.

Take a deep breath and get ready to have a rollicking good time. That's right — this is a computer book, but it's fun. What a concept! Whether you're brand-spanking new to the Office suite or a grizzled Office veteran, we guarantee that reading this book to discover the ins and outs of Office for Mac is fun and easy.

## About This Book

---

Why write a *For Dummies* book about Office for Mac? Well, Office for Mac is a big, somewhat complicated suite of productivity applications, so we made *Office 2021 For Macs For Dummies* a not-so-big, not-so-complicated book that shows you how to perform the most common tasks you're likely to perform using Office for Mac, all without boring you to tears, confusing you, or poking you with sharp objects.

In fact, we think you'll be so darned comfortable that we wanted the title to be *Office For Macs without Discomfort, the Very Comfortable 2021 Edition*, but the publisher wouldn't allow it. Apparently, we *For Dummies* authors have to follow some rules, and using *For Dummies* and *Office For Macs* in this book's title are among them.

Speaking of dummies, we don't think you're dumb — quite the opposite! Our second choice for this book's title was *Office For Macs For People Smart Enough to Know That They Need Help Using It*, but you can just imagine what the Wiley folks thought of that. ("C'mon, that's the whole point of the name!" they insisted. "Besides, it's shorter this way.")

Anyway, the book is chock-full of information and advice, explaining everything you need to know about Office for Mac in language you can understand — along with giving you timesaving tips, tricks, techniques, and step-by-step instructions, all served up in generous quantities.

# Foolish Assumptions

Although we know what happens when you make assumptions, we've made a few, anyway. First, we assume that you, gentle reader, know nothing about using Office — beyond knowing what it is, that you want to use it, that you want to understand it without digesting an incomprehensible technical manual, and that you made the right choice by selecting this particular book.

And so we do our best to explain each new concept in full and loving detail. Maybe that's foolish, but, so be it.

Oh, and we also assume that you can read. If you can't, just ignore this paragraph.

## Icons Used in This Book

Little round pictures (*icons*) appear to the left side of the text throughout this book. Consider these icons miniature road signs, telling you a little something extra about the subject at hand. Here's what the different icons look like and what they all mean:



TIP

Look for Tip icons to find the juiciest morsels: shortcuts, tips, and undocumented secrets about Office for Mac. Try them all and impress your friends!



REMEMBER

When you see this icon, you know that this particular bit is something we think you should memorize (or at least write on your shirt cuff).



TECHNICAL  
STUFF

Put on your propeller-head beanie and pocket protector; these tidbits include the truly geeky stuff. They're certainly not required reading, but they must be interesting or informative or else we wouldn't have wasted your time with them.



WARNING

Read these notes very, very, very carefully. (Did we say *very*?) Warning icons flag important information. Neither the authors nor the publisher is responsible if your Mac explodes or spews flaming parts because you ignored a Warning icon. (Just kidding — that type of catastrophe won't happen.) Macs don't explode or spew (with the exception of a few choice Michael Spindler-era models — true Apple aficionados will know what we're talking about). But we got your attention, didn't we? We tell you again: Read the Warning notes very carefully.

# Beyond the Book

---

There's even more Office for Mac information on [www.dummies.com](http://www.dummies.com). This book's cheat sheet shows you how to create automatic replies to senders in Outlook, check documents for accessibility problems, embed fonts in your Word documents and PowerPoint presentations when sharing, and even check the current weather when viewing your Outlook Calendar. To get to the cheat sheet, go to [www.dummies.com](http://www.dummies.com), and type *Office 2021 for Macs For Dummies Cheat Sheet* in the Search box. You'll see not only the cheat sheet but any significant updates or changes that occur between editions of this book.

# Where to Go from Here

---

Go to a comfortable spot (preferably not far from a Mac) and look through this book.

In the first few chapters, we describe the basic everyday topics you need to understand to operate your Mac effectively. If you're new to Macs and Office for Mac, start with Chapters 1–3, which make up Part 1. The discussion in Part 1 is so basic that if you've been using Office awhile, you might think you know it all — and you might know most of it. But, hey! Not-so-old-timers need a solid foundation. So read what you need and skip the rest.

What are you waiting for? Go — enjoy the book!





# 1

# **Introduction to Microsoft Office for Mac**

## **IN THIS PART . . .**

Get an overview of the various versions of Office for Mac as well as how to install and set them up.

Become acquainted with the four major apps in the Office suite: Word, PowerPoint, Excel, and Outlook.

Explore Office features that work the same way in all four apps, such as menus, toolbars, preferences, and help.

- » Deciding which of the editions of Office for Mac to buy
- » Signing up for a Microsoft account
- » Installing Office
- » Keeping your apps updated

## Chapter **1**

# Overview from 10,000 Feet

**O**ver the next several hundred pages, you can find out in detail about the apps that make up the Microsoft Office for Mac suite. But first you must decide which version of the suite you want or need, acquire a copy of it, and then install it and find out how to update it to ensure that you're always running the latest and greatest (not to mention most stable) version.

So, without further ado, dig in!

## The Many Faces of Office for Mac

When it comes to choices, it seems Microsoft wants to make sure you have a veritable cornucopia of them for Office apps. Combining the number of packages available for individual and business use, there are roughly a dozen to choose from. For simplicity's sake, we focus on the several tasty flavors of Office for Mac for individuals and home users:

- » Office for Mac Home & Student
- » Office for Mac Home & Business

- » Microsoft 365 Personal
- » Microsoft 365 Family

Office for Mac Home & Student and Office for Mac Home & Business are both one-off purchases; you pay one price up front and then own it forever. Microsoft 365 Personal and Microsoft 365 Family offer a subscription model, in which you pay a monthly or yearly fee, with access halting only when you choose to cancel or you miss a payment.

The four editions all provide the big three apps — Word, Excel, and PowerPoint — with variations based on whether you selected the Office or Microsoft 365 version. The Microsoft 365 editions of the big three apps provide the latest features and updates on a continual basis — Microsoft calls these premium versions. When Microsoft develops and implements a new feature, you get it automatically, so your apps are always up to date. The Office editions provide classic versions of the big three — what you see is what you get, with no additions or updates except security and bug fixes. You can't take advantage of new features and products unless you purchase the next Office edition Microsoft releases (they're usually several years apart).

Here's the skinny on each of the four editions:

- » **Office for Mac Home & Student** : The retail price is \$149.99 for a single installation. As the least expensive edition, it includes the big three apps and OneNote. Many users need nothing more.

Note that this edition does *not* include Microsoft Outlook. Outlook, which is sometimes called the Swiss army knife of personal communications software, combines an email client with an address book, a calendar, to-do lists, and searchable notes in a single app.

Unless you dislike the Mail, Contacts, and Calendar apps that are included with macOS, you probably won't miss Outlook much.

- » **Office for Mac Home & Business**: The retail price is \$249.99 for a single installation. What do you get for the additional dough (along with the big three and OneNote)? In two words: Microsoft Outlook.

What's that, you say? You don't know whether you need Outlook? Well then, we suggest that you save yourself a bundle and start with the Home & Student Edition.



TIP



WARNING

Does your organization require or prefer that you use Outlook? It's best to find out before you make a purchase. You can't simply pay a few more dollars to upgrade from Office Home & Student to Office Home & Business; you'd have to pay the full price of Office Home & Business to gain access to Outlook.

- » **Microsoft 365 Personal:** For the price of \$69.99 annually or \$6.99 monthly, you get access for one person to premium versions of the big three, OneNote, Teams, and Outlook, 1TB of OneDrive online storage (more on OneDrive in the next chapter), and the ability to install and use your subscription on up to five devices — Macs, PCs, iOS devices, and Android. That's right: five devices with support for a variety of desktop and mobile operating systems!
- » **Microsoft 365 Family:** The price is \$99.99 annually or \$9.99 monthly for access to everything in Microsoft 365 Personal. Plus up to six people can use the subscription instead of one. You can also try it for free for one month.

So there you have it — four editions for four budgets.

## Installing Office

Regardless of which edition you decide to buy, you'll need a Microsoft account and an internet connection to download the installation package for your apps.

### Getting a Microsoft account

A Microsoft account is similar to your Apple ID; it's an account for you to manage your Microsoft apps and purchases. To download and install your Office apps, your purchase of Office for Mac must be associated with a Microsoft account (personal, business, or school account).

If you don't have a Microsoft account, go to <https://office.com/setup> to create one.

### Downloading and installing Office

To install Microsoft Office, you need the username and password for an administrator account on this Mac. If you don't have an administrator account and password handy, it would behoove you to get one now.

After you have that detail settled, here's how to download and install your Office apps:

- 1. Go to <https://office.com> and sign in to the Microsoft account associated with your Microsoft 365 or Office purchase.**
- 2. Click the Install Office button and download the installer package.**
- 3. Locate and double-click the installer package to launch the installer app.**
- 4. Click Continue on the first screen.**

The screen displays the license terms.

- 5. Read every word of the license terms, and then click Continue.**

We're only half kidding — we know that no one reads the licensing information. But because you're about to enter into a legally binding agreement, we would be remiss not to at least pretend to urge you to read every word.



TECHNICAL  
STUFF

- 6. On the next screen, click Agree.**

The Select a Destination screen appears.

- 7. Choose the destination disk for the software installation and then click Continue.**

The Standard Install on *your hard drive's name* screen appears.

- 8. If you want to install the Office apps somewhere other than the Applications folder, click the Change Install Location button and select another destination.**

In the next step, you click Install. But if you're short on disk space, consider not installing some of the apps. To do so, click the Customize button before you click the Install button and then deselect any items you don't want to install.



TIP

- 9. Click the Install button to open an authentication window, enter an administrator name and password, and then click OK.**

Go get yourself some coffee or a soft drink — the installation takes a bit of time.

- 10. When the screen informs you that the installation is complete, click the Close button and you're ready to go.**

Head on over to your Applications folder and double-click one of the newly installed Office apps to get started.

## DEALING WITH MULTIPLE VERSIONS OF OFFICE

If you have an earlier version of Office on your hard drive when you install Office, the older version isn't touched. You now have two (or possibly even three or more) Office versions in your Applications folder.

In a perfect world, all your Office documents, both new and old, would launch the current versions of Word (or other Office apps) when you open them. But in the real world, this may or may not be your experience.

So, we offer you this little lesson in macOS file-opening mastery. You can cause a single file or all files to open in a specific app in two ways. The first method is to right-click the document, choose Open With from the contextual menu, and select an app. The second method is to set a single file or all files of its type to open in a specific app, as follows:

1. To specify which version of Word, Excel, or PowerPoint opens when you double-click one of its document files, single-click that document file and then choose File ⇨ Get Info (or press ⌘+I).

A drop-down Open With menu appears. If you don't see the Open With menu, click the small, gray disclosure triangle next to the words Open With.

2. Click the Open With menu and select the version of the app you want to open when you double-click this document.
3. If you want all documents of this type to launch this version of Word, click the Change All button.

There you have it — if the wrong version of an Office app launches when you open a document, you now know how to fix it.

## Keeping Your Apps Up-to-Date

Microsoft AutoUpdate is a nifty app that's installed along with your other Office apps (although you won't find it in your Applications folder). AutoUpdate does what its name implies: It automatically searches for updates to your Office apps and installs them.

To open AutoUpdate:

1. **Open an Office app (such as Word or Excel).**
2. **Choose Help → Check for Updates from the menu at the top of the screen.**

The AutoUpdate app launches and scans Microsoft's servers to check for updates to any Microsoft apps you have installed (even apps that don't come with Office, such as Microsoft's web browser, Edge).

3. **When updates are found, click the Update All button to download and install all available updates, or click the Update button to the right of the app's name to only update that app.**
4. **(Optional) If you want AutoUpdate to periodically check for and install updates automatically, select the box labeled Automatically Keep Microsoft Apps up to Date.**
5. **Quit AutoUpdate when you're finished.**



TIP

If you don't elect to have AutoUpdate work automatically, be sure to check every few weeks to a month to make sure you have the latest updates and fixes.



- » Exploring new features
- » Introducing the four main Office apps
- » Examining how the apps work together

## Chapter 2

# A Sweet Suite: Introducing the Office Apps

**M**icrosoft Office for Mac isn't a single, monolithic app that processes words and numbers, creates slide shows, manages your email, calendar, and contact database, and more. No, Office is a suite of programs that share numerous interface characteristics so that many functions are the same across all apps, making it easier for you to seamlessly move between them. The programs are designed to work together harmoniously, adding up to a sum that's greater than its parts.

When you install the software, you don't create a single app named Microsoft Office for Mac, nor is there a single folder that houses all the installed apps. Rather, you'll find that each app is installed separately (in the *Applications* folder, by default); they're easy to find, though, because each starts with the word *Microsoft* (Microsoft Word, Microsoft Excel, and so on). The lone exception is OneDrive, which is simply named *OneDrive*.



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You may have more or fewer Microsoft Office apps in your Applications folder. The number depends on which edition of Office you purchased and which options you choose during installation.

The following list briefly describes the items that matter, focusing on what each one is or does. Note that some of these may not be in your installer package, depending on which version of Office you've purchased or subscribed to:

- » **Microsoft OneNote:** OneNote is a free-form digital note-taking app that can be used to house those great inspirations that pop into your brilliant mind from time to time.
- » **Microsoft Excel:** Excel is the number-crunching member of the Office family. You use this program to create spreadsheet documents.
- » **Microsoft Teams:** Teams is a video-conferencing and collaboration tool designed for organizational communications. It's very much like Zoom and other such apps, but with a familiar Microsoft flair.
- » **Microsoft Outlook:** Microsoft Outlook is the Swiss army knife of Microsoft Office apps — it includes not one, not two, but *five* separate functions. It's
  - An email client
  - An address book
  - An appointment calendar
  - A task and to-do list manager
  - A repository for notes
- » **Microsoft PowerPoint:** PowerPoint is the presentation-creating member of the Office family. You use it to create slide shows.
- » **Microsoft Word:** Word is, of course, the Office word processing program. But it's much more than that these days because you can use it to create almost any document that contains text or images or both.
- » **OneDrive:** It seems that more and more apps and traditionally computer-focused functions are taking place in the cloud these days, meaning these things are web-based (living on the internet). OneDrive is Microsoft's version of cloud-based storage and is similar to Apple's own iCloud service.

You can find out more in Chapter 3 about using OneDrive, Microsoft's free, cloud-based file storage service, for collaboration, co-authoring, and backups.
- » **Microsoft AutoUpdate:** It's important to keep your Microsoft apps updated and in tip-top shape. AutoUpdate keeps you in the update loop by automatically checking for updates periodically and even updating apps automatically, if you so choose.



TIP

# What's New and Good

Microsoft Office for Mac has many new or improved features, but perhaps the most important one is that the suite is now coded to run natively (although thankfully not exclusively) on Macs that have Apple Silicon processors. Office apps are also built for Macs with Intel processors. The installer app will know which version your computer needs during installation.

The system requirements have changed, too. Microsoft supports the three most recent versions of macOS. When a new major version (not an incremental update) of macOS is released, Microsoft picks up support for it and drops support for the oldest. As of this writing, Office for Mac is supported for macOS Monterey, Big Sur, and Catalina. When a newer version of macOS is released (a major version is typically released on an annual basis in the fall), Microsoft will support it, Monterey, and Big Sur, and drop support for Catalina.

We'll stop calling the suite *Office for Mac* now and refer to it as just plain ol' *Office*. Because you're reading this book, you *should* be using Office on a Mac. If you aren't a Mac user, you're reading the wrong book.

There's a lot more to Office, so let's get to it. We start by describing what's new and good in the latest version of Office and continue with major new features common to most or all of the programs that make up the suite. After that, you look at new features and improvements specific to Word, PowerPoint, Excel, and Outlook. The section concludes with a short rant on what's bad or ugly in this release.

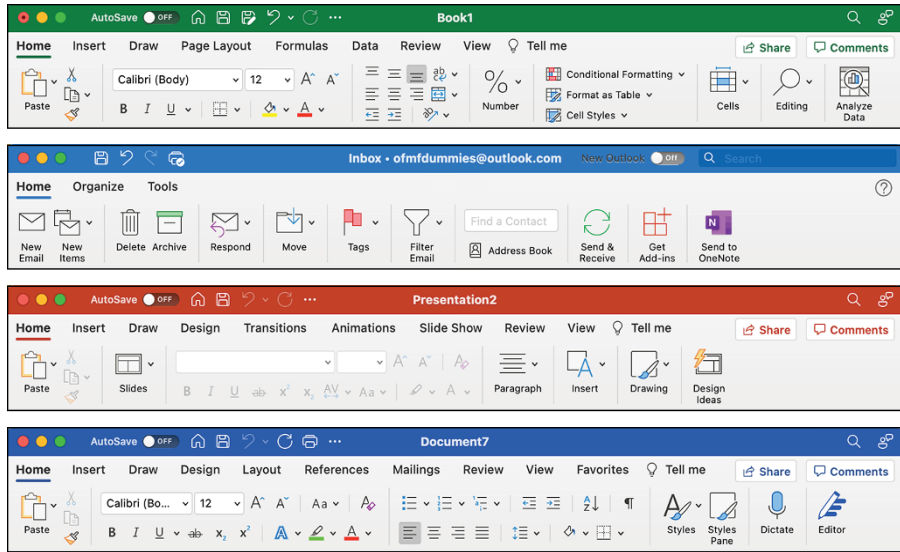
## The suite life

All Office apps have received facelifts, so that's a good thing all around. They still look very macOS-like but incorporate the coloring and themes of their Windows counterparts to make it easy to switch between platforms and still feel a sense of familiarity. Figure 2-1 shows you the ribbon's Home tab for Excel, Outlook, PowerPoint, and Word. Note the color assigned to the Quick Access toolbar for each; these are the same colors used for each app in Windows, iOS, and Android.



TIP

You can enable or disable certain ribbon features or change the order of its tabs by choosing *App Name* ⇨ Preferences ⇨ Ribbon & Toolbar from the menu at the top of the screen in every app.



**FIGURE 2-1:** The ribbon's Home tab as seen in Excel, Outlook, PowerPoint, and Word, respectively.

Throughout this book, we examine some of the new features available throughout Office. For now, here's an overview :

- » **Co-authoring:** Now multiple users can collaborate simultaneously on a single Office document using different computers (Macs or PCs). Updates made by other people appear on your screen in real time, and you can choose to be alerted whenever other document collaborators are present. To use real-time co-authoring, you and your collaborators must store shared files in OneDrive. This feature doesn't work with the LTSC version of Office. LTSC, which stands for Long Term Servicing Channel, is available only for commercial or government clients.
- » **SharePoint and OneDrive:** All Office apps support not just one but *two* Microsoft cloud storage services. You can open and save documents stored on either cloud from a Mac or a PC or one of the Office web apps.

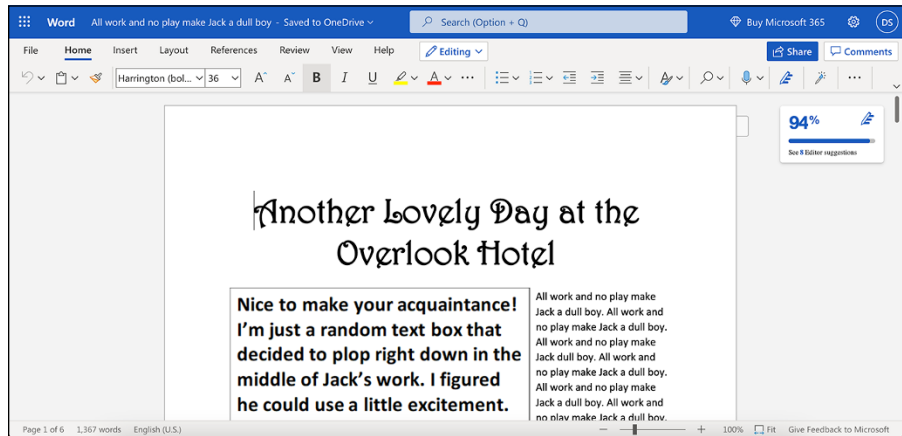


TIP

Microsoft offers 5 gigabytes of free online storage space when you sign up for its free OneDrive service at <https://onedrive.com/>. (This is the same amount as Apple's basic version of iCloud but a mere bagatelle compared to Google Drive's 15GB for a basic free account.) When you store documents on your free OneDrive, you can not only open them using Office on a Mac or PC but also edit them in a web browser using one of the Office web apps. If you need more than 5GB of storage, you'll need to sign up for Microsoft 365, where you can get up to 1TB (or 1,000GB!) of storage.

- » **Office for the web apps:** Open an Office document without a copy of Office? You betcha. If the file is stored on your (free) OneDrive, you can open and edit it in a web browser, as shown in Figure 2-2. This feature isn't exactly new but has been updated immensely.

**FIGURE 2-2:**  
The Office.com version of Word looks suspiciously like its Mac and PC siblings.



- » **AutoSave:** If your document is stored in OneDrive, you can use the AutoSave feature to instantly save any changes you've made, as well as make those changes visible in real-time on other devices. This feature doesn't work on the LTSC version of Office.

Many features mentioned in this section are available in Word, PowerPoint, and Excel but not in Outlook. That's because many of these new features are document oriented and Outlook is the only one of the four that doesn't create its own documents.

- » **Graphics galore:** Office offers a slew of new images, icons, and other graphics, particularly via the web, to beautifully adorn your documents, spreadsheets, and presentations.
- » **Improved new document experience:** Excel Workbook gallery, PowerPoint Presentation gallery, and Word Document gallery provide quick access to themes, templates, and recently used documents. Browse great-looking previews to see what your document will look like before you start working on it.
- » **Improved performance:** Don't expect the Office apps to launch in under .005 seconds or to fetch your groceries, but they have been updated to open faster and to work more efficiently than previous versions.

Office has hundreds of other tweaks, fixes, new features, and improvements, including many streamlined dialog boxes, toolbars, and panes, and better media integration (with your pictures, movies, and music). We could probably write an entire book about all the new and improved capabilities in Office. But the boss says that we have to show you how to use everything, too, so we had best move along now.

The following sections provide overviews of new features specific to the big four Office apps — Word, Excel, PowerPoint, and Outlook.

## Word

Word has been the primary tool we use to make a living for quite a while now (we're talking decades here). Word still feels like Word but offers several enticing new features, such as

- » **Enhanced dark mode:** Dark mode was a feature in previous incarnations, but the actual document remained a stark white. Now, even the documents themselves utilize the dark background and themes, making dark mode that much easier on the eyes.
- » **More colors in immersive reader view:** The immersive reader view now supports several colors to help make things more interesting and allow for customization.
- » **Better voices in read aloud mode:** You now have more lifelike and natural-sounding voices to grace your ears when listening to Word read back the text of your documents while using read aloud mode.

## PowerPoint

Among the new features in PowerPoint, a few stand apart from the rest:

- » **Animated GIFs of slide shows:** The latest version of PowerPoint for Mac allows you to save your presentations as animated GIFs, which make it easy to share via platforms such as social media.
- » **Ink replay:** Sometimes it's fun (and even necessary) to use the Draw tab to draw on your slides to emphasize something. Wouldn't it be cool if your audience could watch replays of you drawing (or "inking" as Microsoft calls it) on your slides? With ink replay, you can incrementally show how your inkings progress during the slide show, kind of like watching a mini-movie of you as you made the drawings in real time.