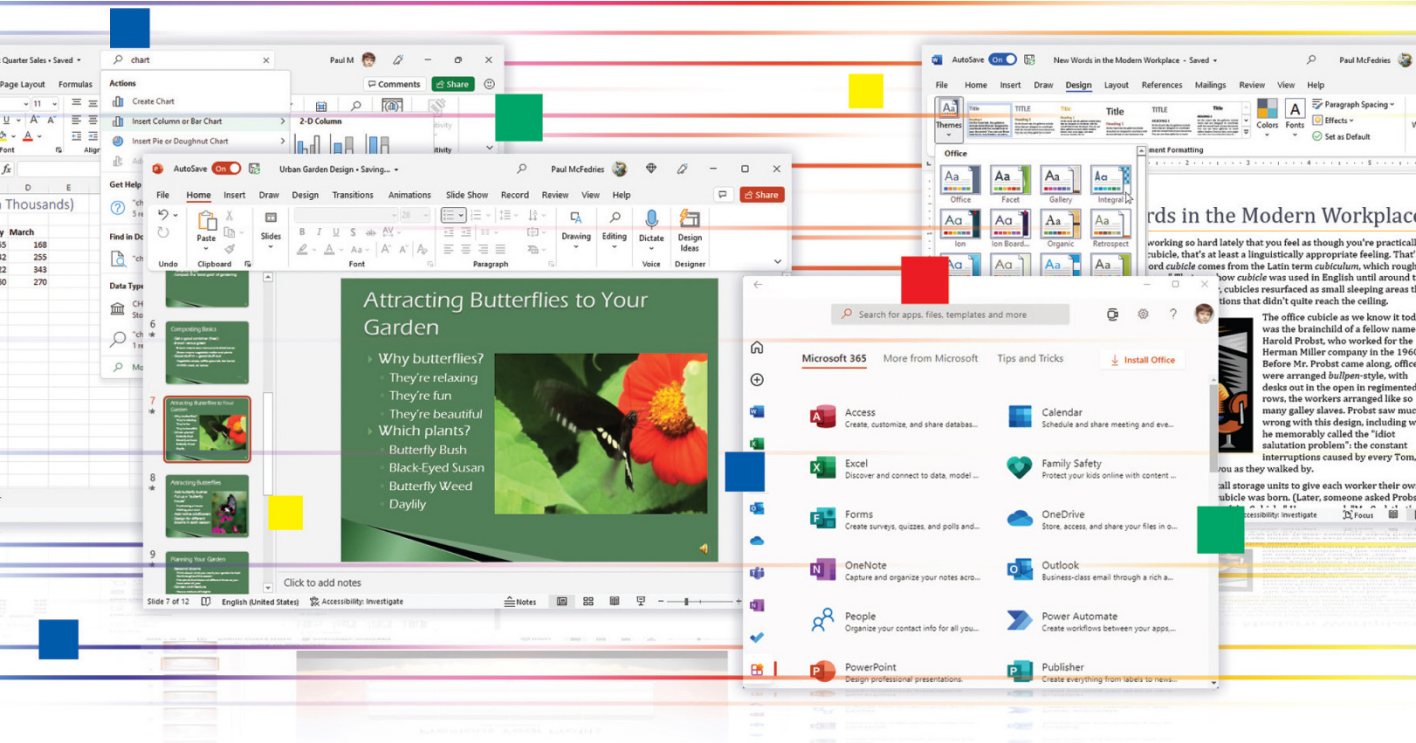


Teach Yourself VISUALLY™

Microsoft 365



Paul McFedries

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Teach Yourself
VISUALLY™

Microsoft 365

by Paul McFedries



Teach Yourself VISUALLY™ Microsoft 365

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About the Author

Paul McFedries is a full-time technical writer. Paul has been authoring computer books since 1991, and he has more than 100 books to his credit. Paul's books have sold more than four million copies worldwide. These books include the Wiley titles *Teach Yourself VISUALLY Windows 11*, *Teach Yourself VISUALLY Excel 2016*, *Excel Workbook For Dummies*, *Excel All-in-One For Dummies*, and *Excel Data Analysis For Dummies, Fifth Edition*. Paul invites you to drop by his personal website at www.paulmcfedries.com or follow him on Twitter @paulmcf.

Author's Acknowledgments

It goes without saying that writers focus on text, and I certainly enjoyed focusing on the text that you'll read in this book. However, this book is more than just the usual collection of words and phrases. A quick thumb-through of the pages will show you that this book is also chock-full of images, from sharp screenshots to fun and informative illustrations. Those colorful images sure make for a beautiful book, and that beauty comes from a lot of hard work by Wiley's immensely talented group of designers and layout artists. I thank them for creating another gem. Of course, what you read in this book must also be accurate, logically presented, and free of errors. Ensuring all of this was an excellent group of editors that included project editor Lynn Northrup, technical editor Doug Holland, copy editor Kim Wimpsett, and production editor Barath Kumar Rajasekaran. Thanks to all of you for your exceptional competence and hard work. Thanks, as well, to acquisitions editor Devon Lewis for asking me to write this book.



How to Use This Book

Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

The Conventions in This Book

1 Steps

This book uses a step-by-step format to guide you easily through each task. **Numbered steps** are actions you must do; **bulleted steps** clarify a point, step, or optional feature; and **indented steps** give you the result.

2 Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross reference to a related area of the book.

3 Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

4 Tips

Tips offer additional information, including warnings and shortcuts.

5 Bold

Bold type shows command names, options, and text or numbers you must type.

6 Italics

Italic type introduces and defines a new term.

Using Sparklines to View Data Trends

You can place a micro-chart of data in a single cell in your worksheet. Excel refers to these micro-charts as **sparklines**.

You can create three types of sparkline charts: line, column, or win/loss. All three show you, at a glance, trend information for a range of data you select. Excel places a sparkline chart in the cell immediately to the right of the row of cells you use to create the chart. Excel offers several styles that you can apply to your sparklines.

Using Sparklines to View Data Trends

Insert a Sparkline

1 Select the row of cells containing the data you want to include in the sparkline chart.

Note: To avoid having to move the sparkline chart, make sure an empty cell appears to the right of the cells you intend to chart.

2 Click the **Quick Analysis** button.

3 Click **Sparklines**.

4 Click the type of sparkline chart you want to insert.

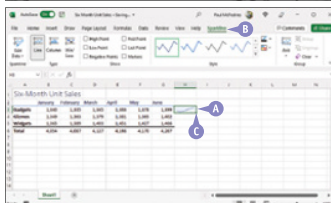
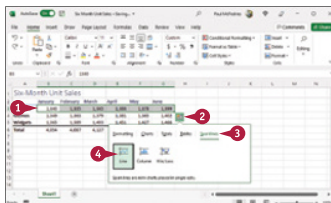
This example creates a line sparkline chart.

5 Excel inserts the sparkline chart in the cell to the right of the selected cells.

6 The Sparkline contextual tab appears.

7 Repeat steps 1 to 4 to add sparklines for the rest of your data.

8 Alternatively, you can drag the Fill handle down to create a sparkline group. See the upcoming Tip for more about sparkline groups.



Apply a Sparkline Style

1 Click the cell containing a sparkline that you want to style.

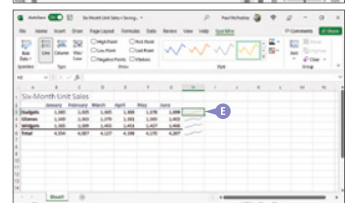
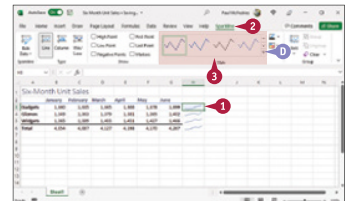
2 Click **Sparkline**.

3 Use the **Style** gallery to select the style you want to apply to the sparkline.

4 You can click **More** to display the full Style gallery.

5 Excel applies the style to the sparkline.

Note: To delete a sparkline chart, right-click it and then click **Sparklines**. Click either **Clear Selected Sparklines** or **Clear Selected Sparkline Groups**.



TIPS

Can I create multiple sparklines simultaneously?

Yes. You can select data on multiple rows; Excel creates a sparkline for each row and treats the sparklines as a group. For example, if you change the chart type of one sparkline, Excel changes the chart type for the entire group.

How can I change the chart type of a sparkline?

Click the cell containing the sparkline and then click the **Sparkline** contextual tab. In the Type group, click the sparkline chart type you want to use.

1

1

2

3

4

2

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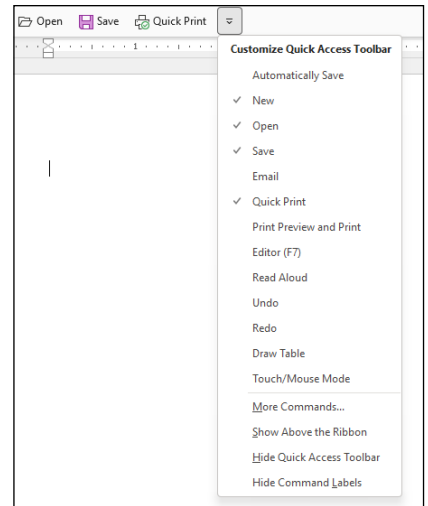
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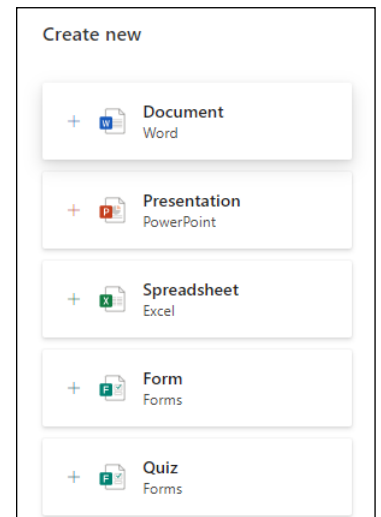
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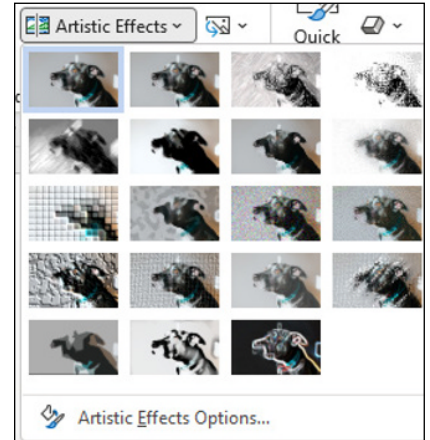
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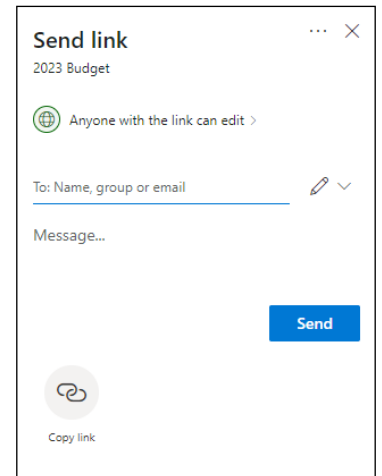
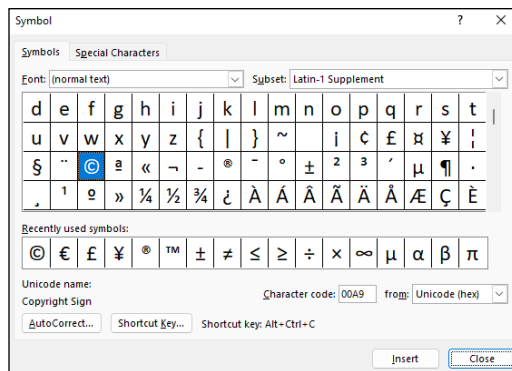


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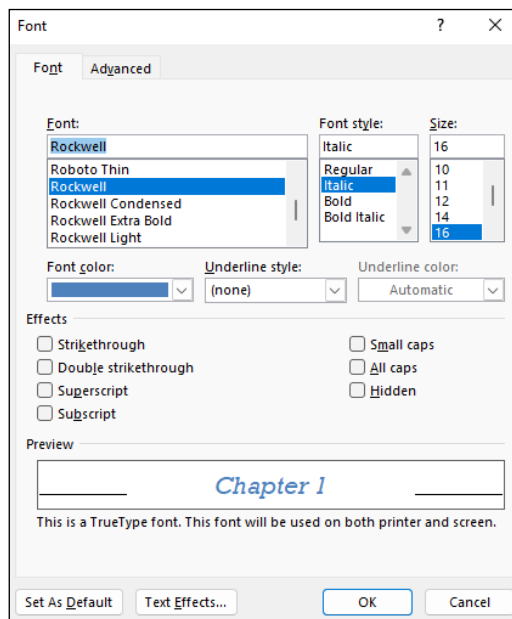
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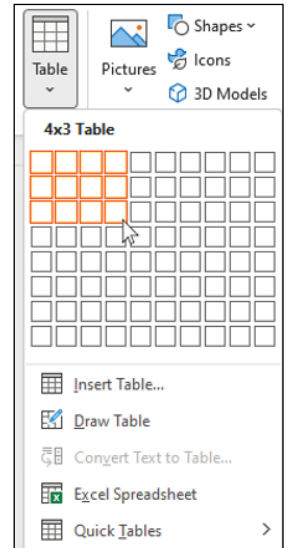
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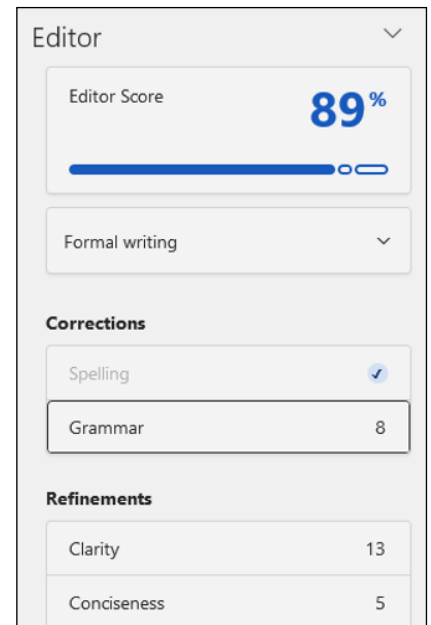


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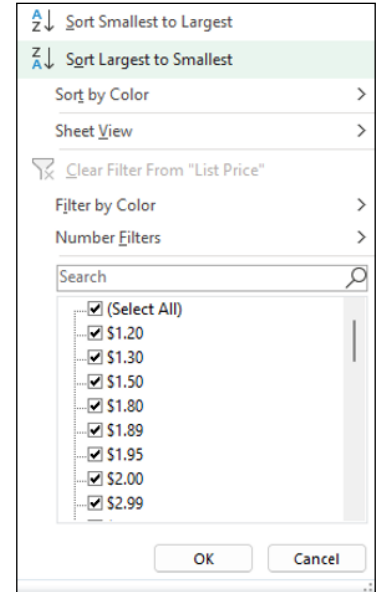
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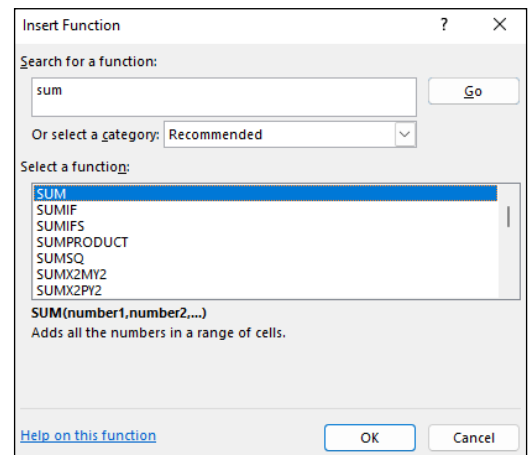
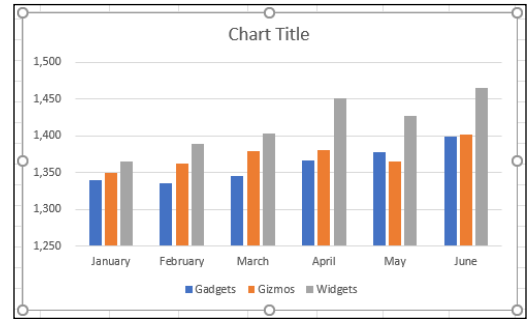


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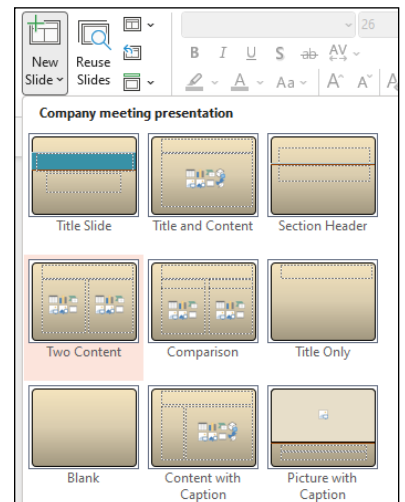
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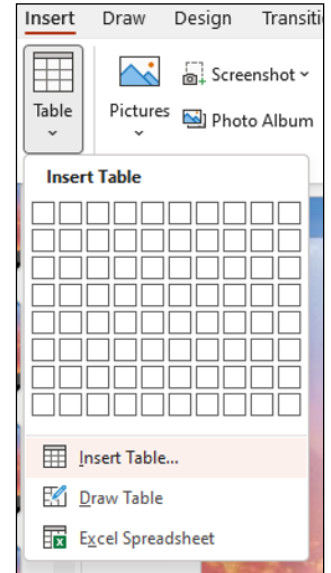
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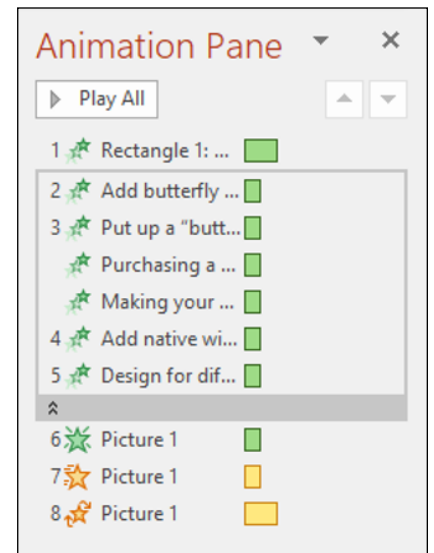
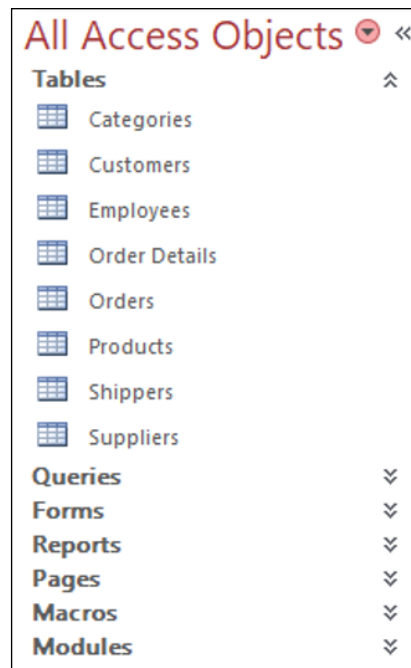


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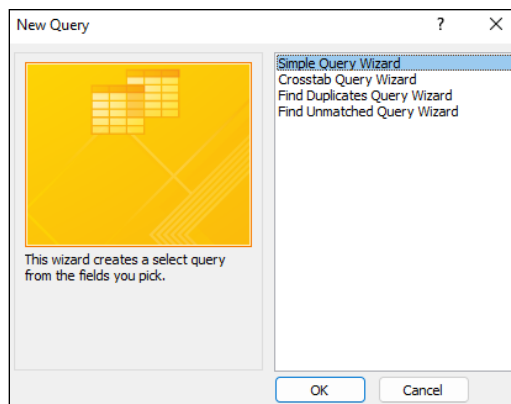
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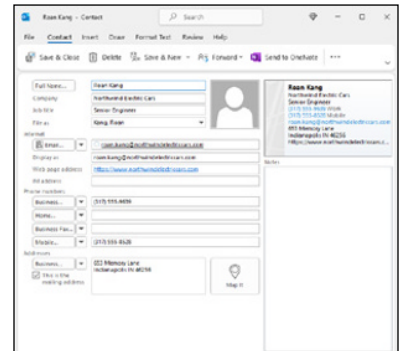
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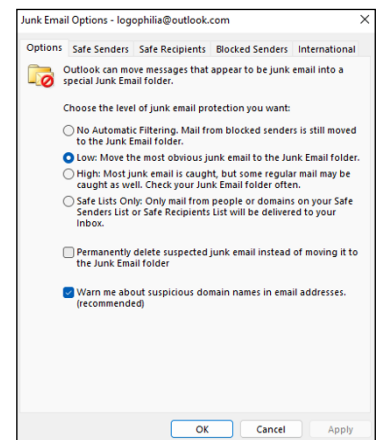
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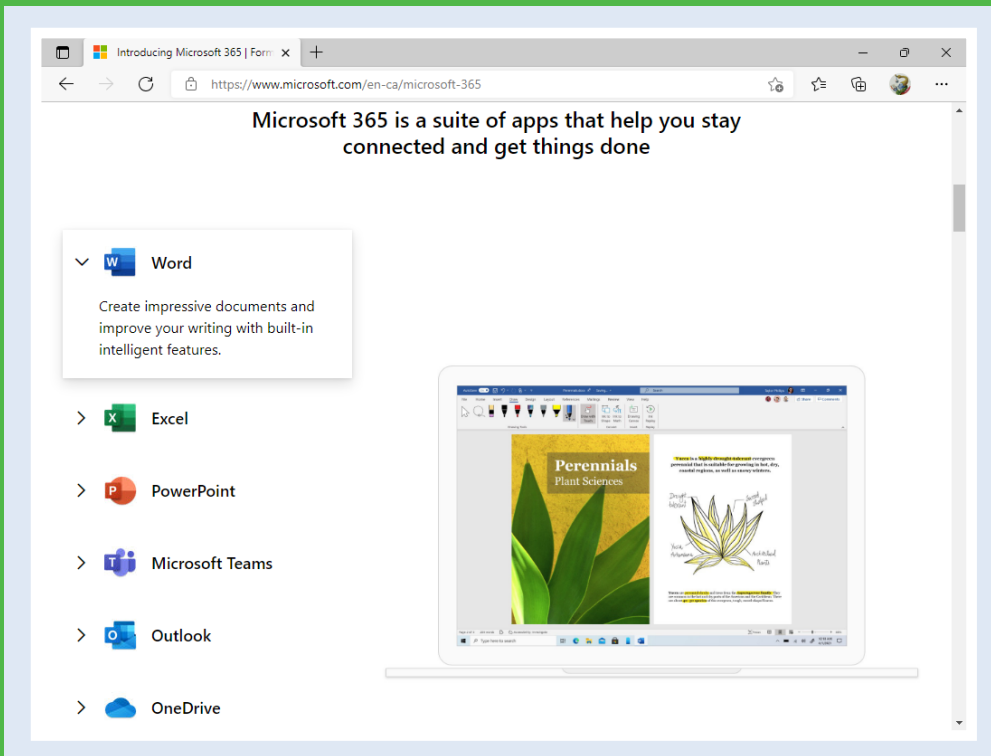


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PART I

Microsoft 365 Features

The Microsoft 365 applications share a common look and feel. You can find many of the same features in each program, such as the Ribbon, Quick Access Toolbar, program window controls, and the File tab. Many of the tasks you perform, such as creating and working with files, share the same processes and features throughout the Microsoft 365 suite. In this part, you learn how to navigate the common Microsoft 365 features and basic tasks.



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Start and Exit Microsoft 365 Apps

A Microsoft 365 installation creates an icon for each Microsoft 365 app either on the Start menu or in the All Apps list. To work with an app, you need to know how to launch the app on your PC. When you are finished with an app, you also need to know how to exit the app.

This section uses Word to demonstrate how to open an app from Windows 11. Once a Microsoft 365 app opens, its Start screen appears, where you can find a recent document or start a new document. For other ways to open or create a document, see Chapter 2.

Start and Exit Microsoft 365 Apps

1 Click **Start** (🪟).

The Start menu appears.

A Alternatively, you can click **Search** (🔍), type the name of the app, and then click the app in the search results.

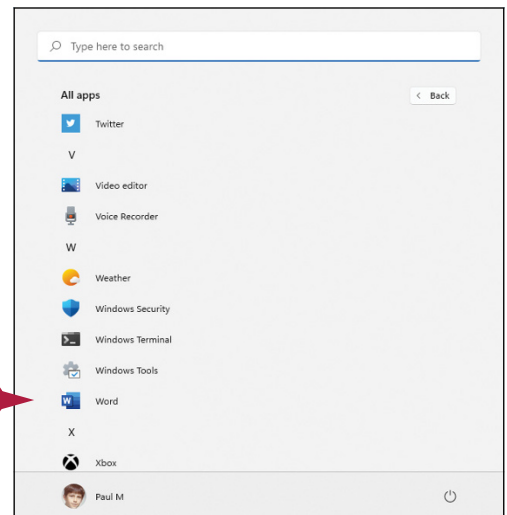
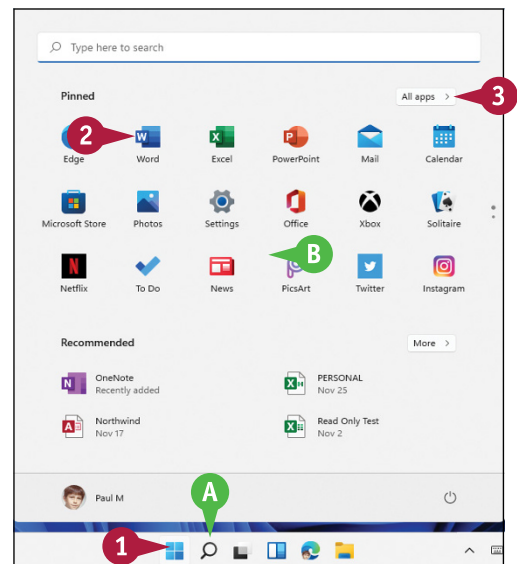
2 Click the Microsoft 365 app you want to start.

Note: If you do not see the Microsoft 365 app you want, skip to step 3.

3 Click **All apps**.

Windows displays the All Apps list.

4 Click the app you want to open.



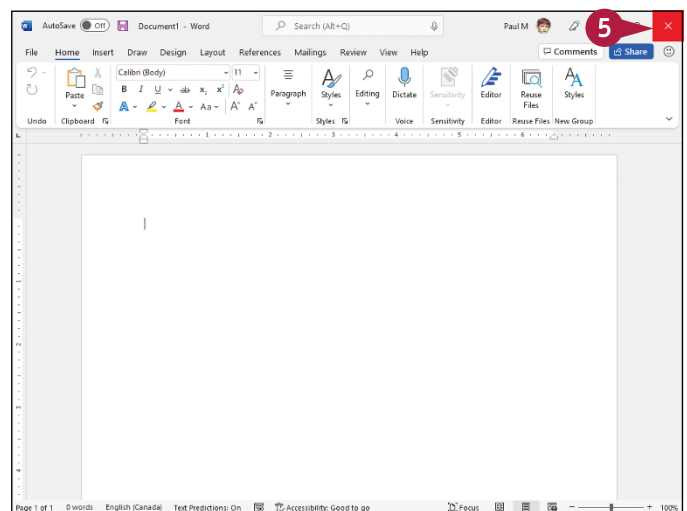
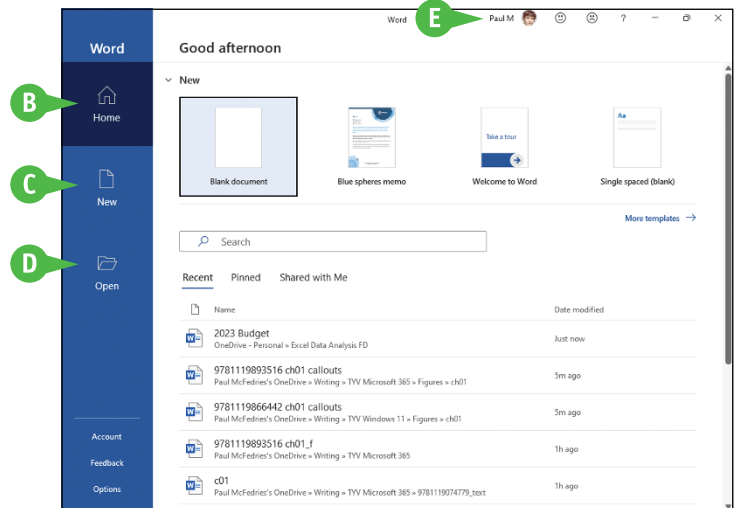
The app launches and displays its Start screen.

- B** You can use the Home panel to start a blank document or open a recent document.
- C** You can use the New panel to start a new document.
- D** You can use the Open panel to open an existing document.
- E** This area indicates whether you have signed in to your Microsoft 365 subscription.

Note: See Chapter 4 for details about signing in to Microsoft 365.

- 5** To exit the app, click the **Close** button (X).

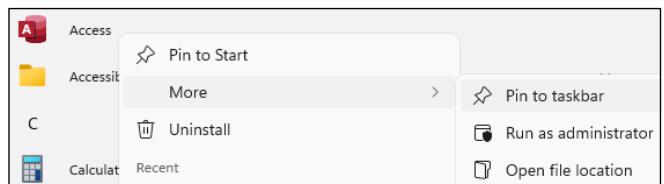
Note: If you have multiple documents open, you must click **Close** (X) for each file to exit the app.



TIP

Can I create a shortcut to open a Microsoft 365 application?

Yes, you can pin the app to the Windows Start menu or taskbar. Follow steps 1 to 4 in this section, and then right-click the app name in the All Apps list. From the menu that appears, either click **Pin to Start** to add the app to the Pinned section of the Start menu or click **More** and then click **Pin to taskbar** to pin the app to the Windows taskbar. To open the app, click the app's tile in the Pinned section of the Start menu or the app's button on the taskbar.



Explore the App Window

All Microsoft 365 apps share a common appearance and many of the same features, and when you learn the features of one Microsoft 365 app window, you can use the same skills to navigate the windows of the other Microsoft 365 apps. These common features include the title bar, program window controls, zoom controls, and the Ribbon. The Ribbon is an important Microsoft 365 feature because it contains the app commands and features that you will use most often. You learn more about the Ribbon later in this chapter.

A Title Bar

Displays the name of the open file, the name of the Microsoft 365 app, and the AutoSave and Save buttons.

B Search

Enables you to search for items within the app.

C Microsoft 365 Indicator

Displays your Microsoft 365 sign-in status. If you see your name, you are signed in to your Microsoft 365 subscription. You can click your name to display a menu that enables you to manage your Microsoft account settings or switch to a different Microsoft account. If you are not signed in, this area shows a Sign In link.

D Program Window Controls

Enable you to control the appearance of the app window. You can minimize the Ribbon, and you can minimize, maximize, restore, or close the app window.

E Zoom Controls

Change the magnification of a document.

F View Shortcuts

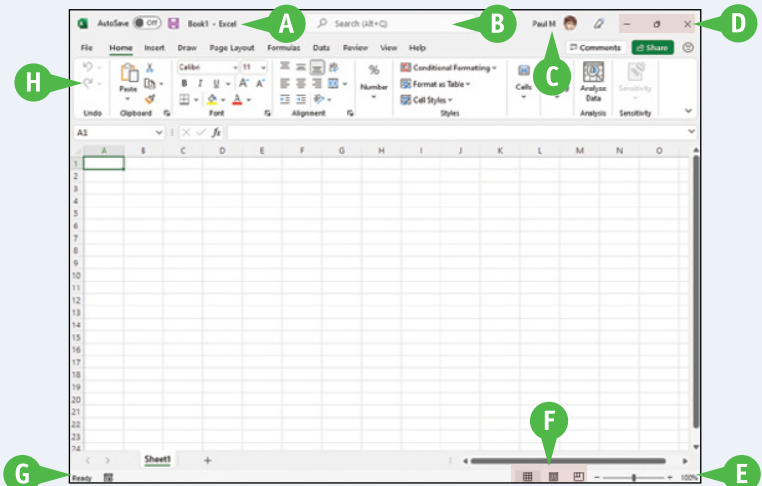
Switch to a different view of your document.

G Status Bar

Displays information about the current Microsoft 365 document.

H Ribbon

Displays groups of related commands in tabs. Each tab offers buttons for performing common tasks.

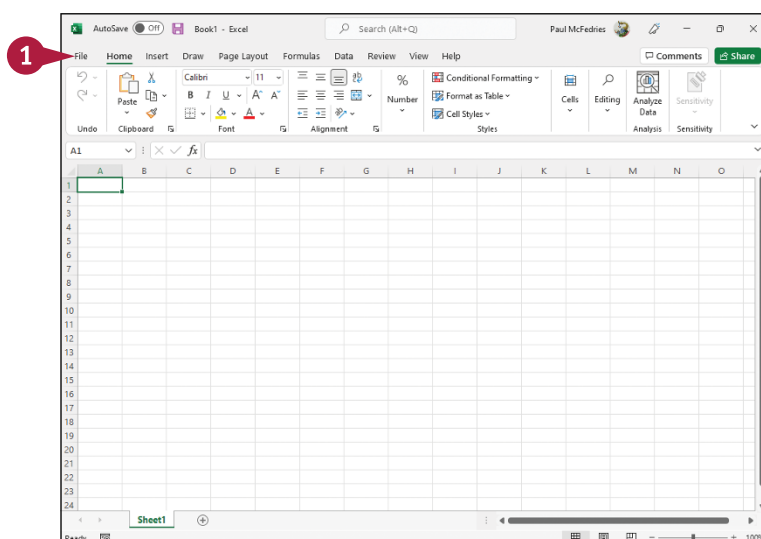


Work with Backstage View

You can click the File tab to display Backstage view. In Backstage view, you find a list of actions that you can use to open, save, print, remove sensitive information, and distribute documents as well as modify the app's settings. You can also use Backstage view to manage the places on your computer hard drive or in your network that you use to store documents and to manage your Microsoft 365 account.

Work with Backstage View

- 1 Click the **File** tab to display Backstage view.



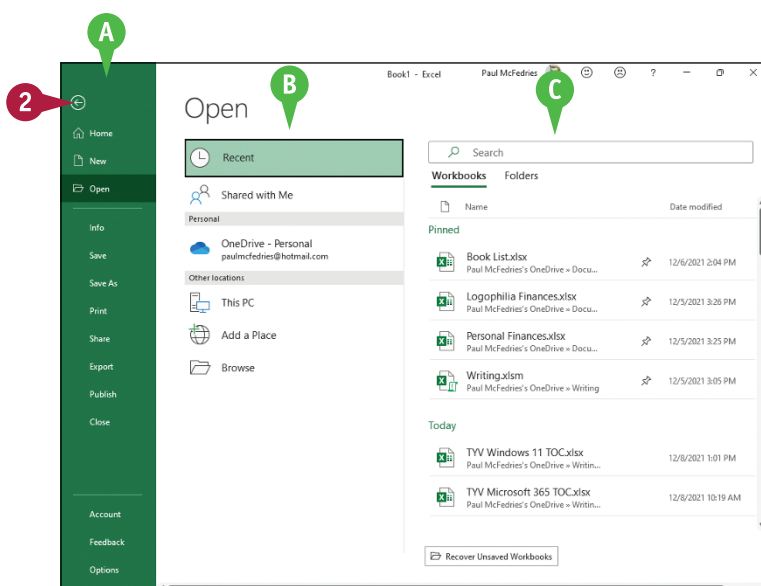
- A Commonly used file and app management commands appear here.

- B Buttons you can click appear here.

- C Information related to the button you click appears here. Each time you click a button, the information shown to the right changes.

Note: The Home, New, Close, and Options commands do not display buttons or information, but take other actions.

- 2 Click the **Back** button (←) to return to the open document.



Change the Color Scheme

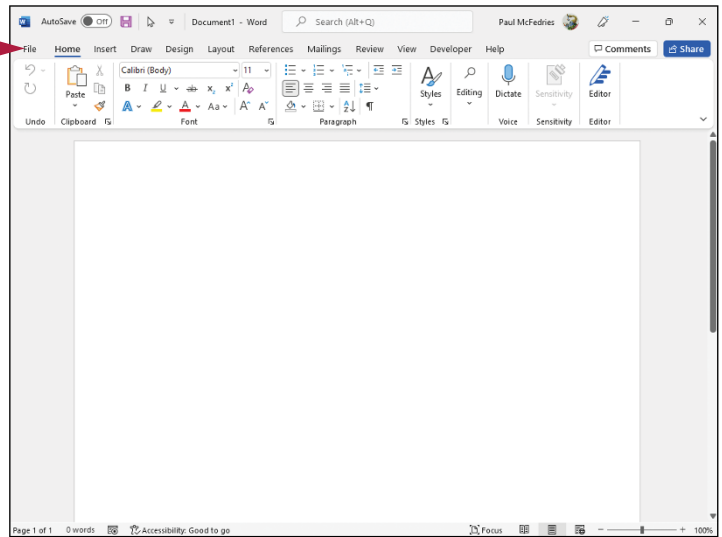
You can use Microsoft 365 themes and background patterns to change the appearance of the app screen. Themes control the color scheme the app uses, and background patterns can add interest to Backstage view. Color schemes can improve your ability to clearly see the screen, but be aware that some schemes might be distracting.

Microsoft 365 themes are available even if you are not signed in to Microsoft 365, but to use background patterns, you must sign in to Microsoft 365. For details on how to sign in and out of Microsoft 365, see Chapter 4.

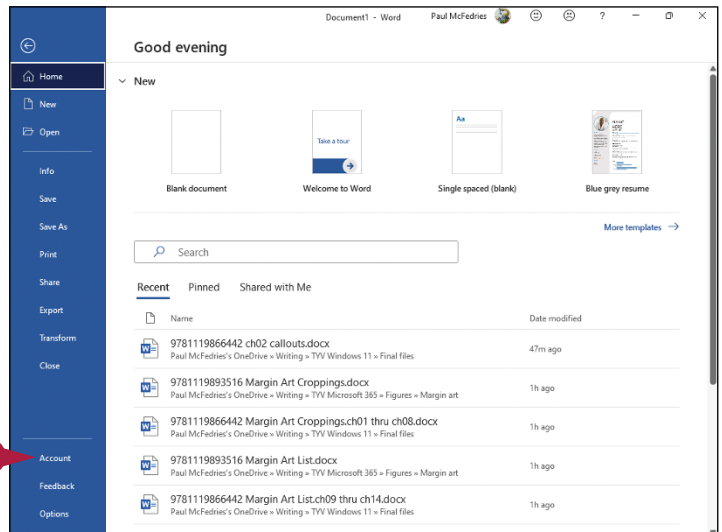
Change the Color Scheme

Note: Make sure you are signed in to Microsoft 365. See Chapter 4 for details.

1 Click **File** to open Backstage view.



2 Click **Account**.

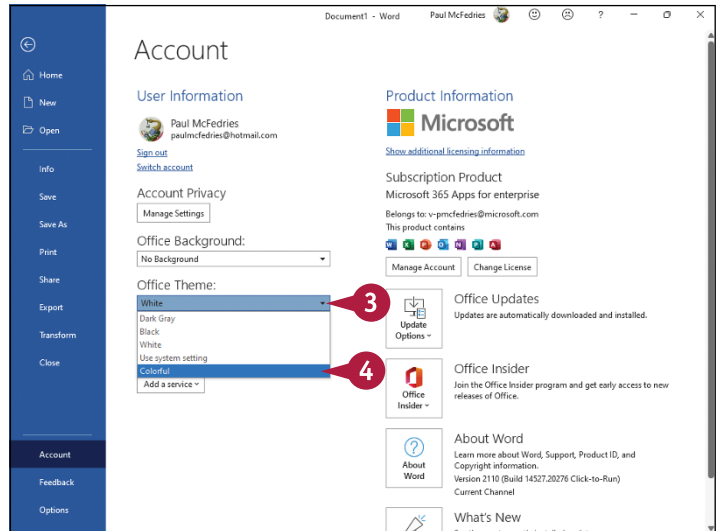


3 Click the **Office Theme** ▾.

4 Click a theme.

The colors of your app change.

Note: Some theme changes are more subtle than others.



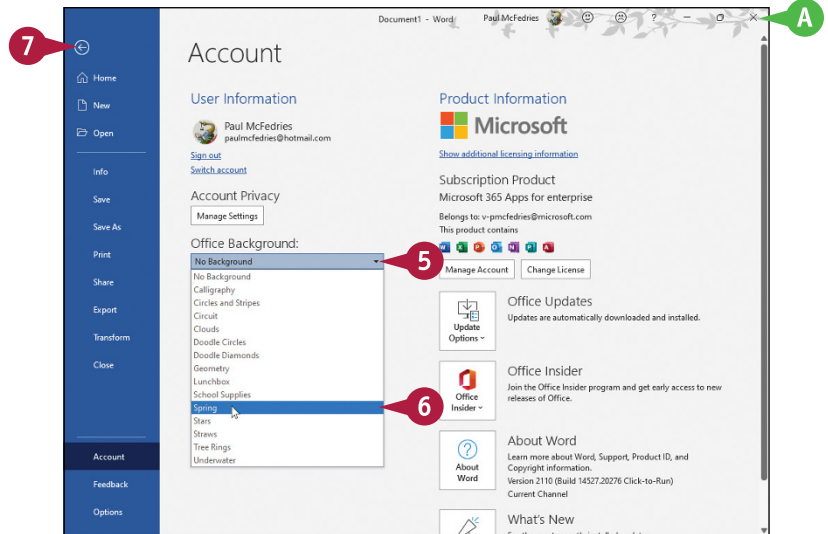
5 Click the **Office Background** ▾.

6 Click the pattern you want to use or click **No Background**.

A As you point the mouse (☞) at a choice in the menu, a background pattern appears at the top of the window. The pattern appears only in Backstage view; it does not appear as you work on documents.

7 Click the **Back** button (⏪) to return to your document.

The Microsoft 365 theme you selected appears.



TIP

What happens if I select a background and then sign out of Microsoft 365?

The background no longer appears in the app but will reappear when you next sign in to Microsoft 365. Similarly, theme changes you make while signed in to Microsoft 365 might disappear when you sign out of Microsoft 365. With themes, however, you do not need to be signed in to Microsoft 365 to make a selection. Just complete steps 1 to 4 in this section.

Search for a Ribbon Command

All the Microsoft 365 apps enable you to search for Ribbon commands. Searching can be useful when you need to perform a task that you do not perform regularly and so are not sure where to find the command you need. Rather than wasting time looking through various Ribbon tabs and groups, the Search feature can help. By entering some or all of the command name, the Search features can take you directly to the command you want to run. You can still use the Ribbon directly, as described in the next section, “Work with the Ribbon.”

Search for a Ribbon Command

- 1 Open a document in a Microsoft 365 app.

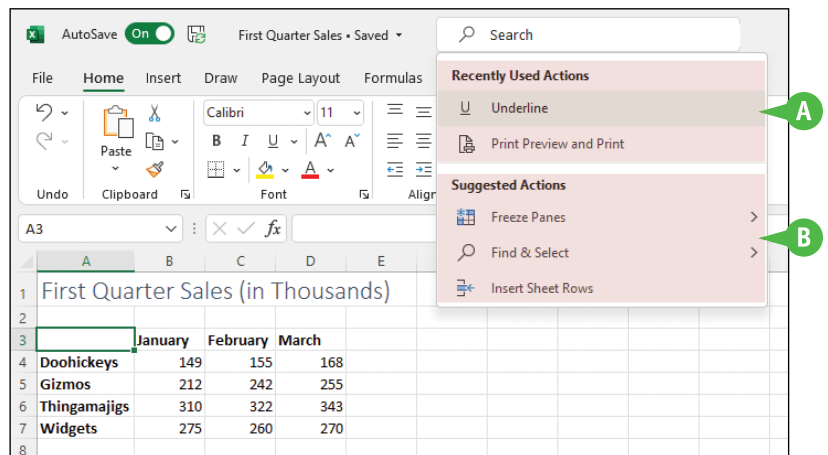
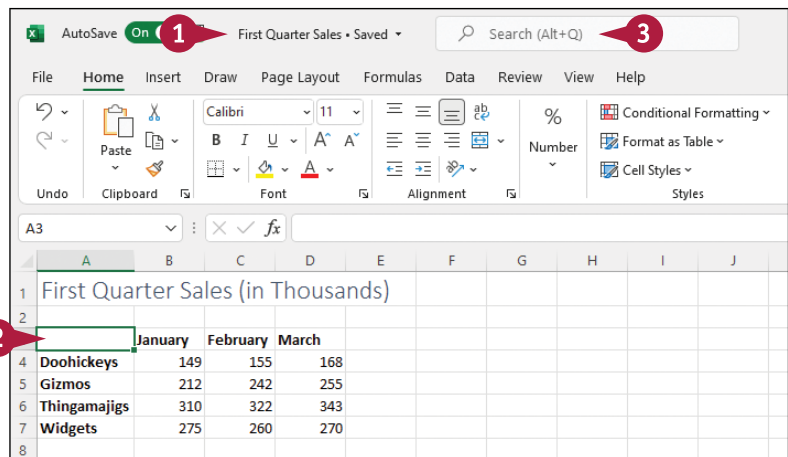
Note: See Chapter 2 for details on opening a Microsoft 365 document.

- 2 Select an object or some text in the document, if required by the Ribbon command you want to run.
- 3 Click inside the **Search** text box.

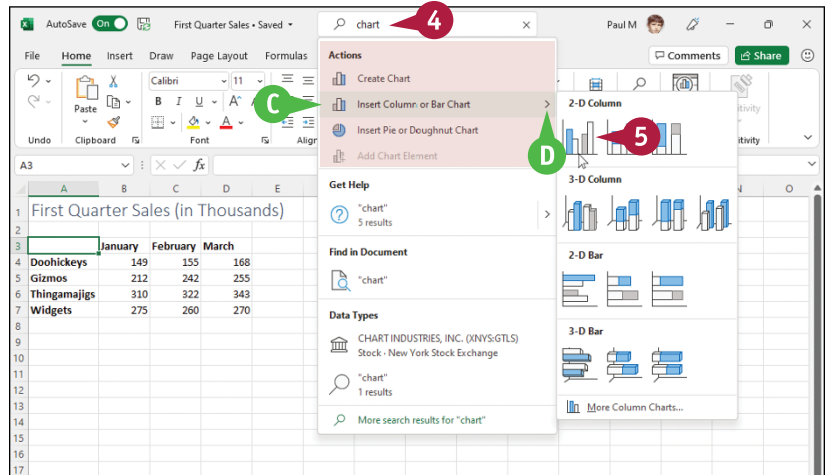
Note: You can also select the Search text box by pressing

Alt + Q.

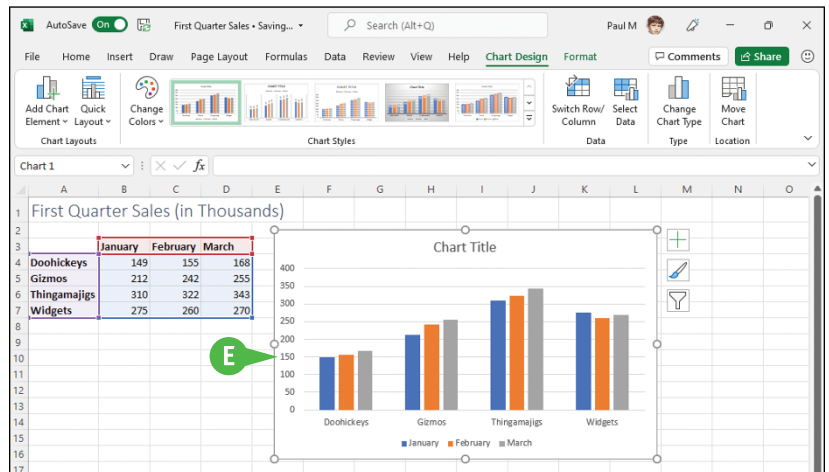
- A A list of your recent Ribbon commands appears in the Recently Used Actions section.
- B A list of suggested Ribbon commands appears in the Suggested Actions section.



- 4 Type the name or a brief description of the command you want to run.
- C The app lists possible commands you can use to complete your task.
- 5 Click a command to use it.
- D Commands with arrows (>) display additional commands.



- E The app performs the action you selected; in this example, Excel charts the worksheet data.



TIPS

Will I need to type a description of the action I want to take if it is the same action I have previously taken?

No. The Search feature remembers your previous searches and displays them in the Recently Used Actions section of the menu that appears when you perform step 2.

If I no longer want my previous searches to appear, can I clear them from the list?

No. The Search feature retains your searches in the Recently Used Actions section of the menu that appears when you click in the Search box.

Work with the Ribbon

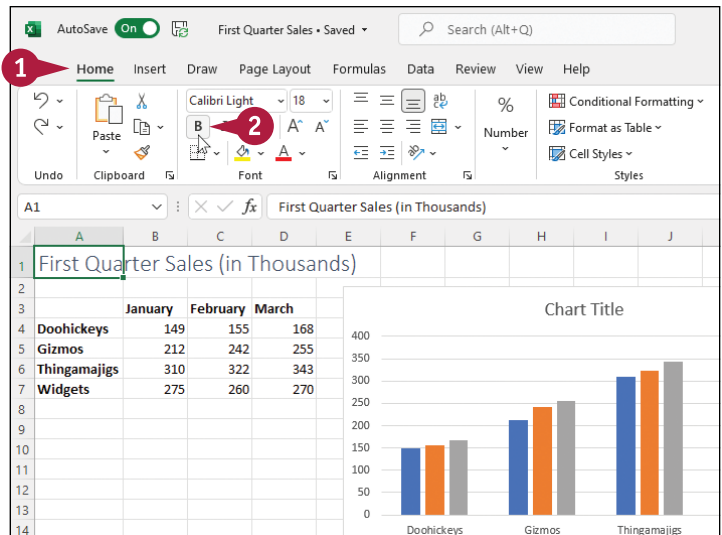
You use the Ribbon to access an app's commands. The Ribbon is divided into tabs, the names of which vary depending on the app. Excel's Ribbon, for example, includes tabs named Home, Insert, Formulas, and Data. Each Ribbon tab is divided into groups of related commands. The Home tab includes the Clipboard group for copying and pasting data and the Font group for applying text formatting.

Each Ribbon command does one of four things: run a task, display a menu of commands, display a gallery, or launch a dialog box.

Work with the Ribbon

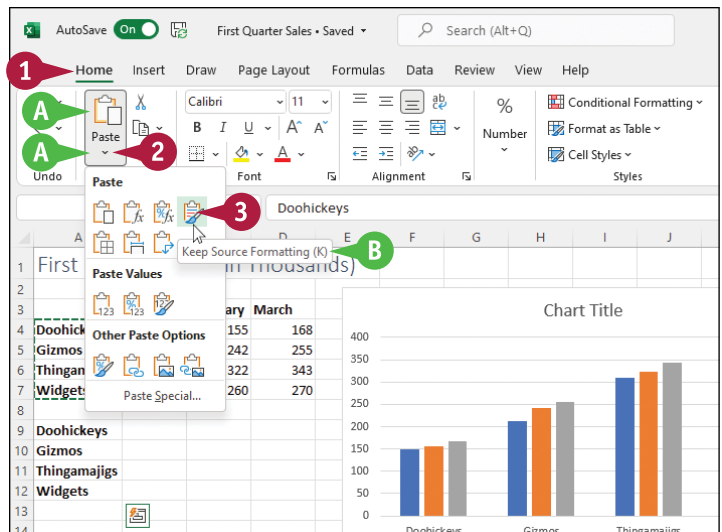
Run a Command

- 1 Click the tab containing the command you want to use.
- 2 Click the command.
The app runs the command.



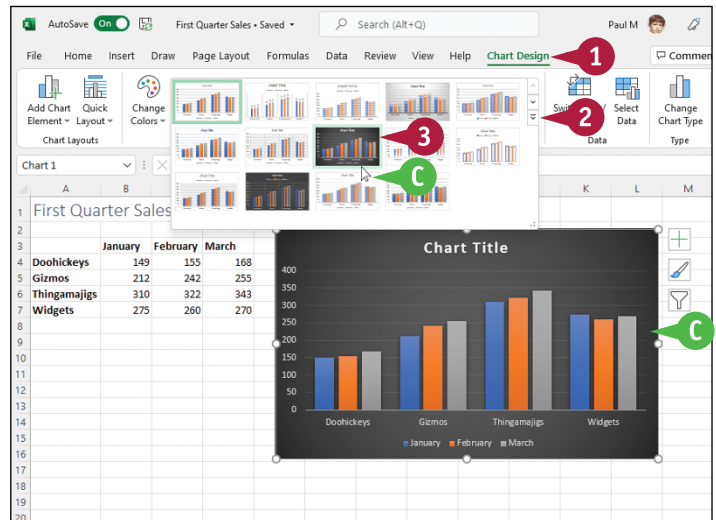
Run a Command from a Menu

- 1 Click the tab containing the menu you want to use.
 - A Many Ribbon buttons have two parts: The top part runs the standard command, and the bottom part displays the menu.
- 2 Click the button's arrow (▼).
A menu of additional commands appears.
 - B Hover the mouse (☞) over a command to see a tooltip that displays the command's name.
- 3 Click the command you want to run.



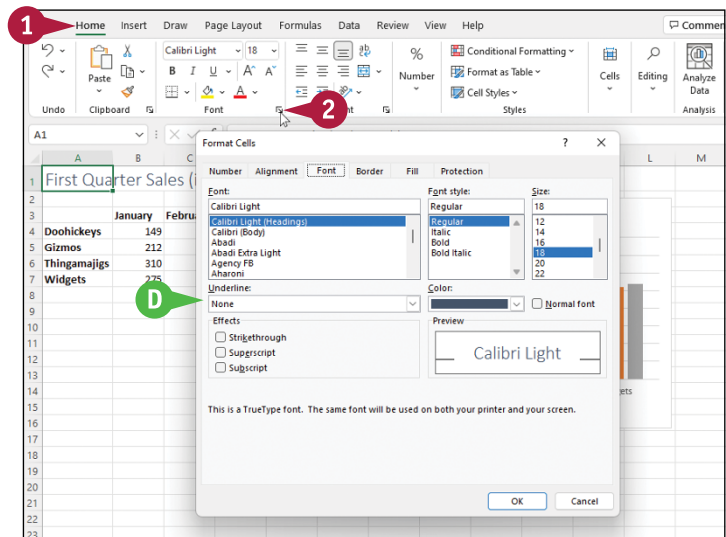
Choose an Item from a Gallery

- 1 Click the tab containing the gallery you want to display.
 - 2 Click the gallery's **More** button (☰).
 - 3 Click the gallery item you want to apply.
- C When you hover the mouse (☞) over a gallery item, the app displays a preview of the effect.



Launch a Dialog Box

- 1 Click the tab containing the group you want to work with.
 - 2 Click the group's dialog box launcher (☰).
- D The app displays a dialog box containing additional settings related to the group.



TIPS

Why do some Ribbon tabs appear and disappear?

Tabs that come and go on the Ribbon are known as *contextual tabs*. They are contextual in the sense that they appear only when you select an object in a document. For example, if you select a chart in Excel, the Chart Design and Format tabs appear. These contextual tabs contain commands related to working with charts. When you click outside the chart to deselect it, the contextual tabs disappear because you no longer need them.

Can I make the Ribbon take up less room?

Yes. Right-click any section of the Ribbon and then click **Collapse the Ribbon**. You now see just the Ribbon tabs. You can display the full Ribbon temporarily by clicking a tab.

Customize the Quick Access Toolbar

The Quick Access Toolbar offers one-click access to your frequently used commands. The Quick Access Toolbar is hidden by default, so to use it you must first display it. Its default position is below the Ribbon. Also by default, the Quick Access Toolbar either is empty or contains just one or two buttons, so you must customize this toolbar to add the commands you use often, such as the New, Open, Save, and Quick Print commands.

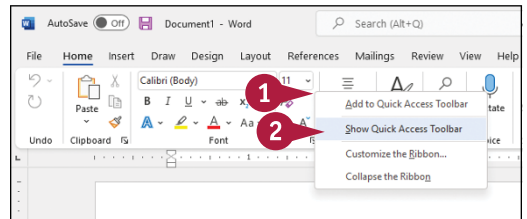
You can also reposition the Quick Access Toolbar so that it appears above the Ribbon, and you can configure it to show only the command icons.

Customize the Quick Access Toolbar

Display the Quick Access Toolbar

- 1 Right-click the Ribbon.
- 2 Click **Show Quick Access Toolbar**.

The app displays the Quick Access Toolbar below the Ribbon.



Add Commands to the Quick Access Toolbar

- 1 On the Quick Access Toolbar, click the **More** button (☰).
- 2 Click a command.

