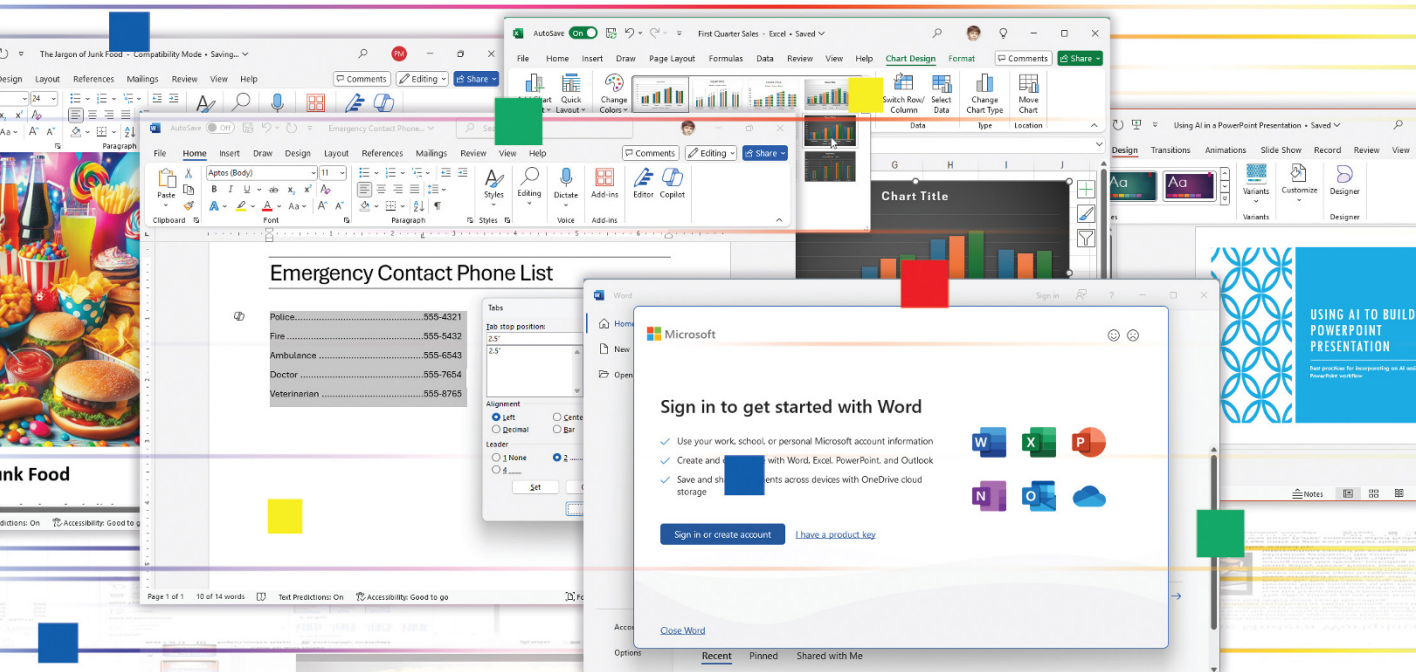


Teach Yourself VISUALLY™

Microsoft 365

Second Edition



Paul McFedries

Visual
A Wiley Brand



Microsoft 365 Second Edition



Microsoft 365 Second Edition

by Paul McFedries



Teach Yourself VISUALLY™ Microsoft 365, Second Edition

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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, Second Edition*; *Teach Yourself VISUALLY Excel 2016*; *Teach Yourself VISUALLY Zoom*; *iPad and iPad Pro For Dummies, 2024–2025 Edition*; and *HTML, CSS, and JavaScript All-in-One For Dummies*. Paul invites you to drop by his personal website at paulmcfedries.com.

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 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, proofreader Priya Sundar, and production editor Archana Pragash. Thanks to all of you for your exceptional competence and hard work. Thanks, as well, to acquisitions editor Jim Minatel for asking me to write this book.

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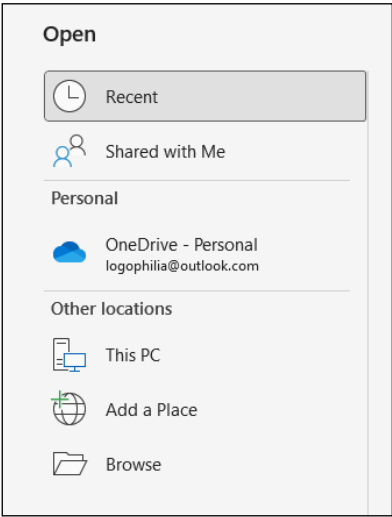
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Microsoft 365 Basics

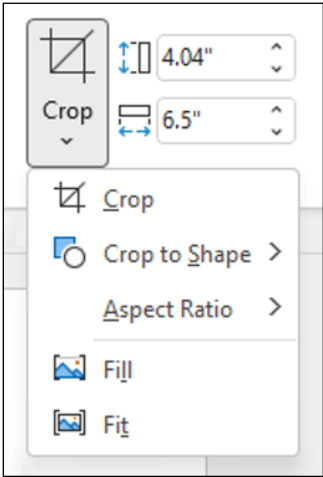
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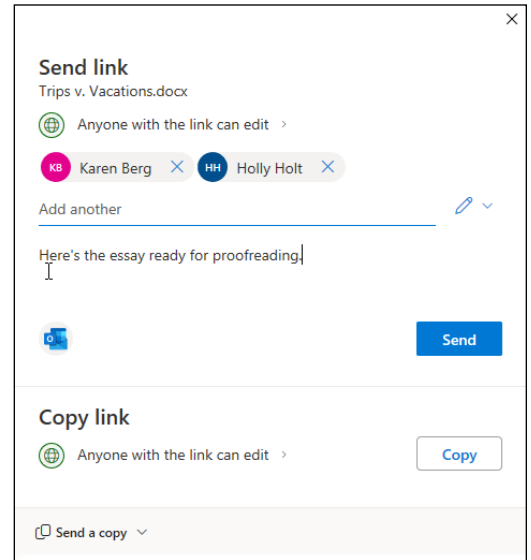
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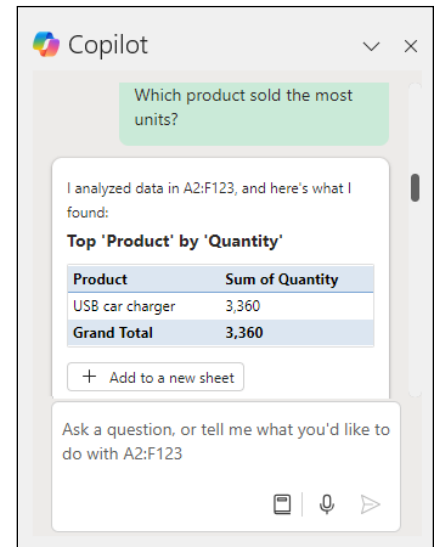


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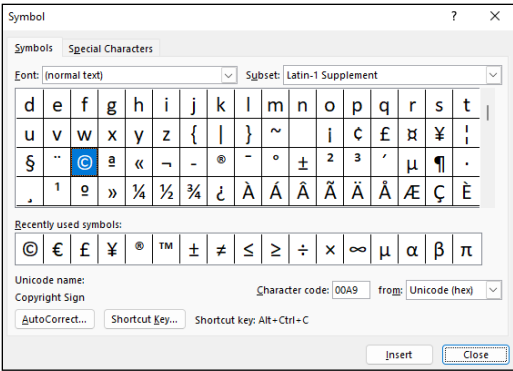
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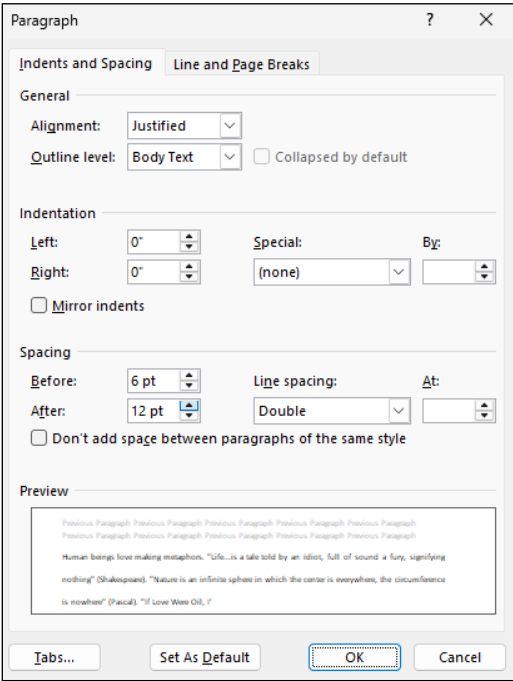
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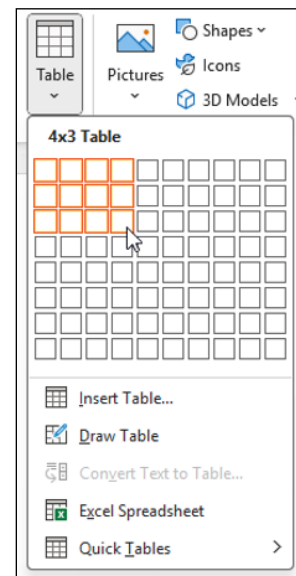
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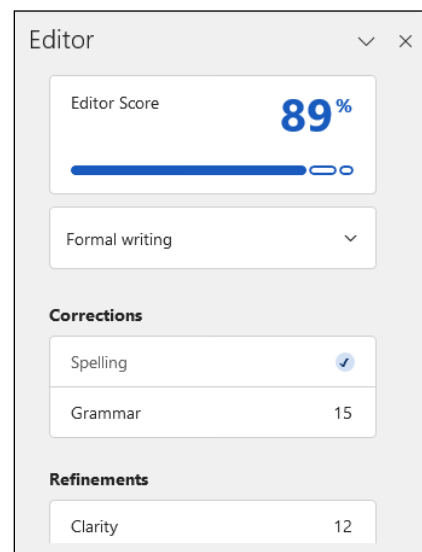


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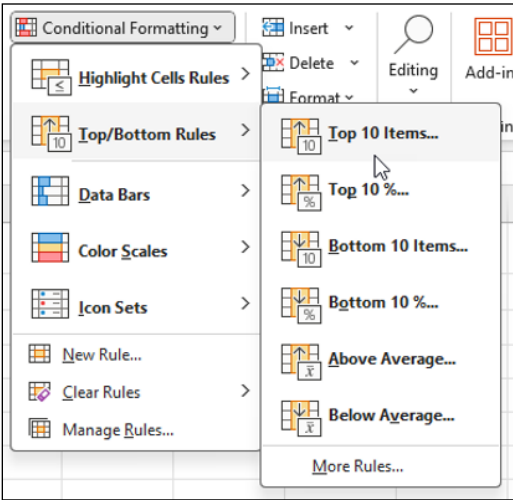
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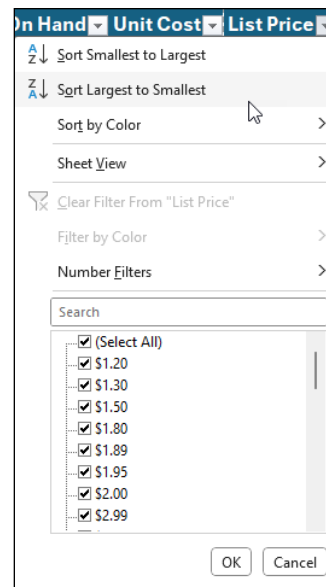
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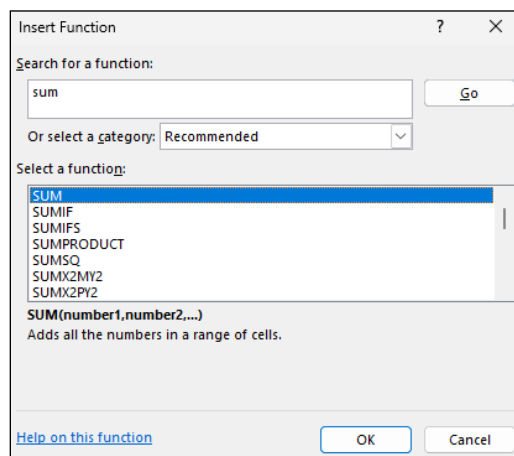
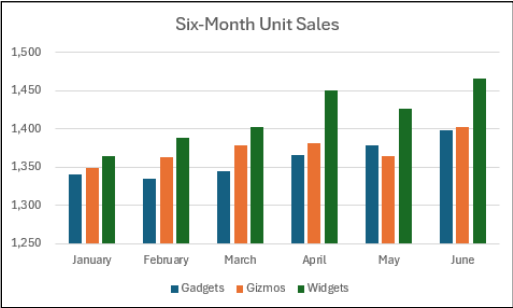


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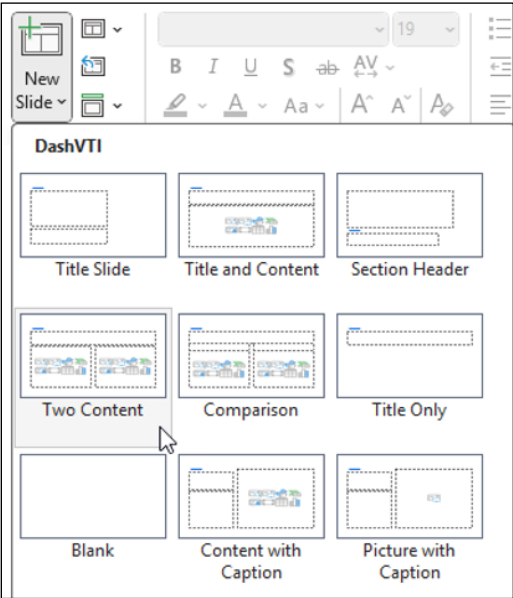
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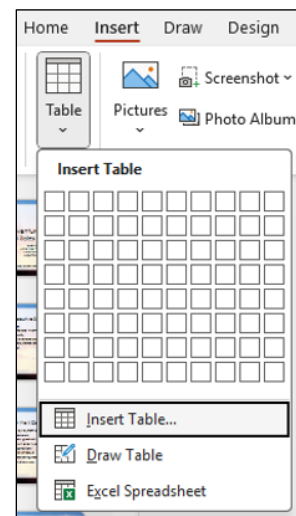
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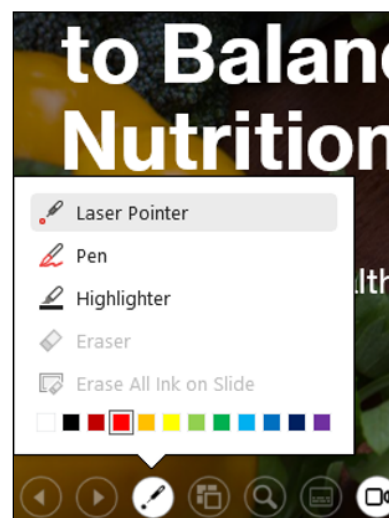


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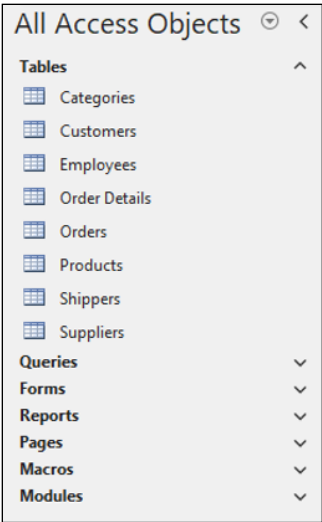
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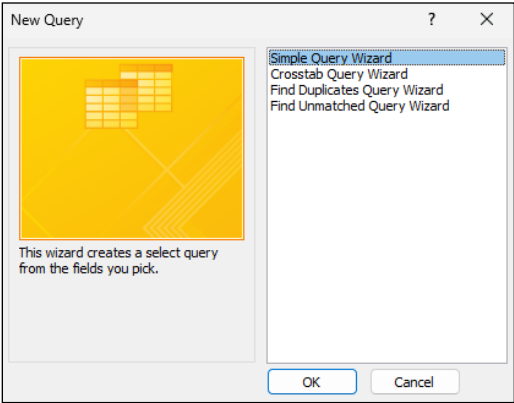
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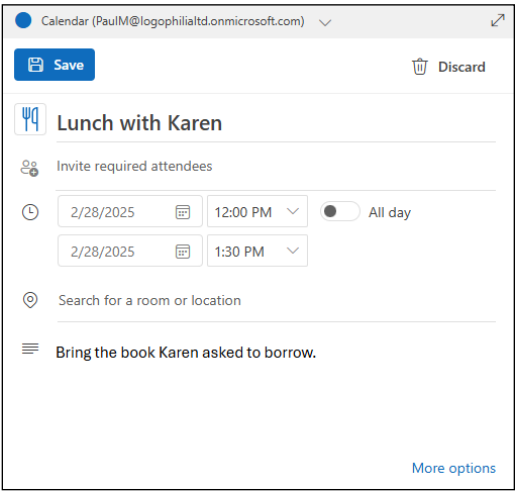
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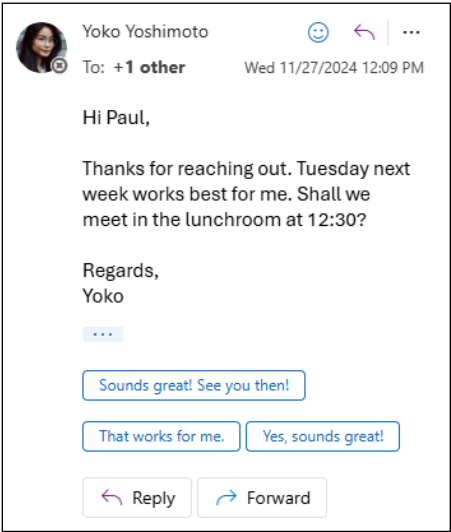
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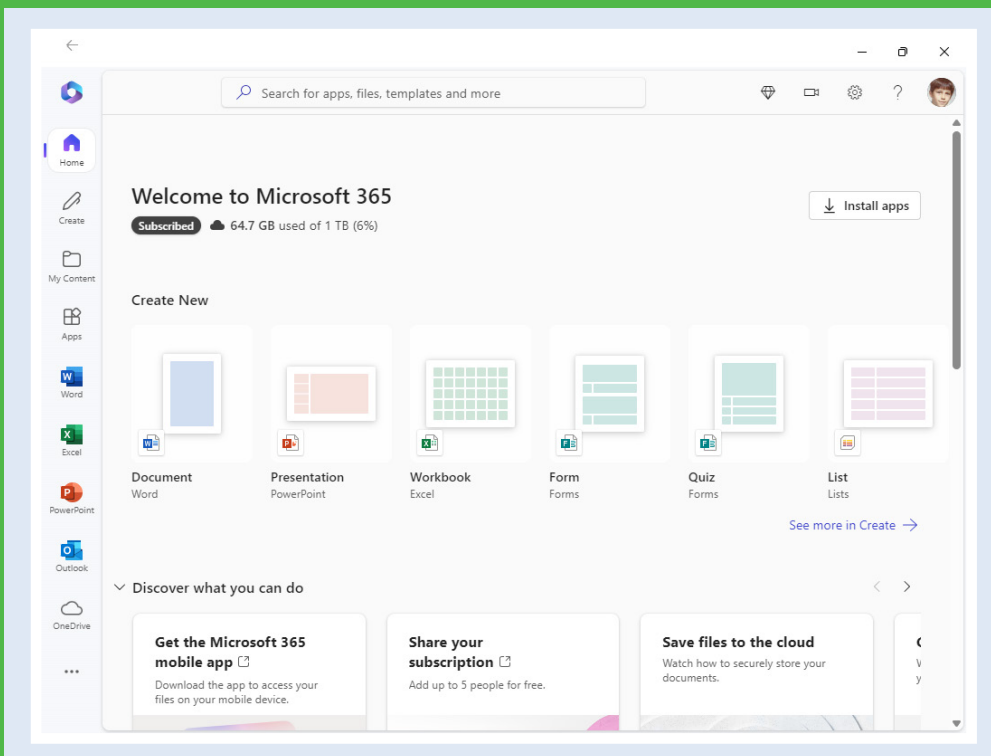
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PART I

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, 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. Other ways to open or create a document are covered later in this chapter.

Start and Exit Microsoft 365 Apps

- 1 Click **Start** (■).

The Start menu appears.

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

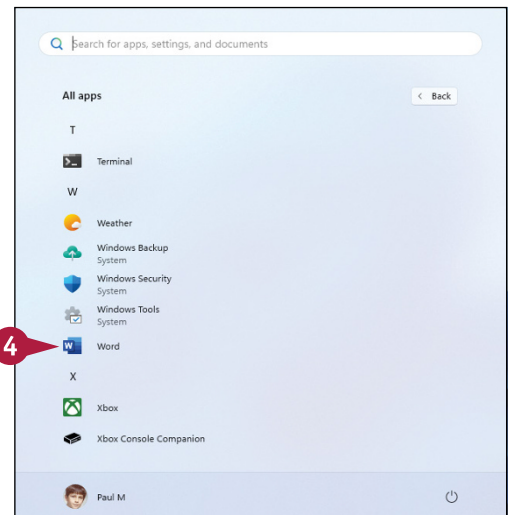
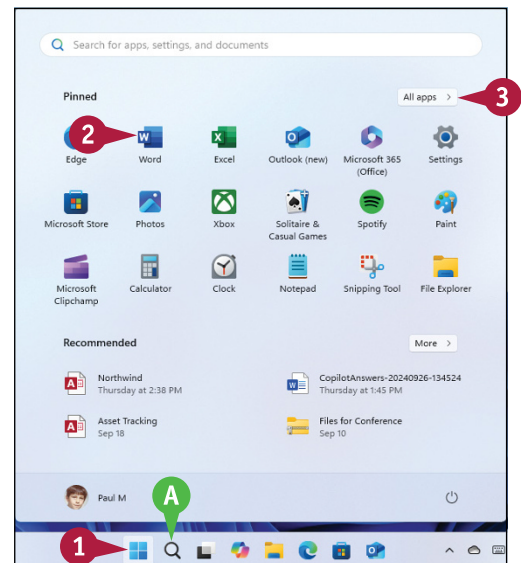
- 2 Click the Microsoft 365 app you want to start.

Note: If the Microsoft 365 app you want is not on the main Start menu, continue with step 3.

- 3 Click **All apps**.

Windows displays the All Apps list.

- 4 Click the app you want to open.



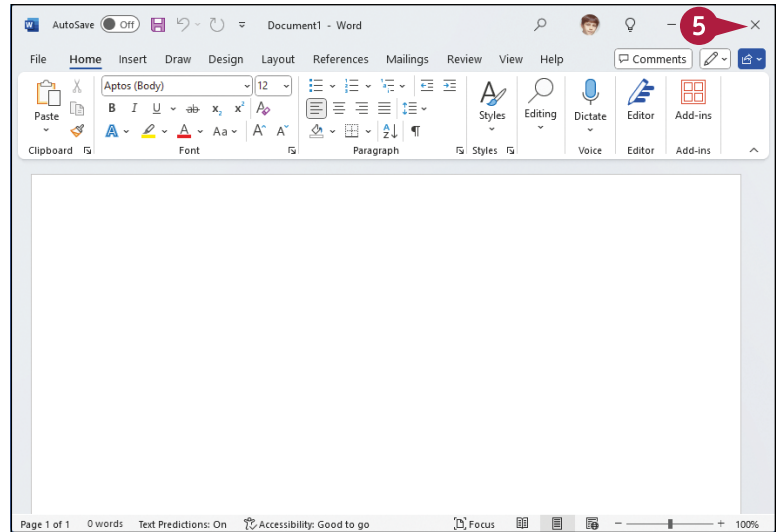
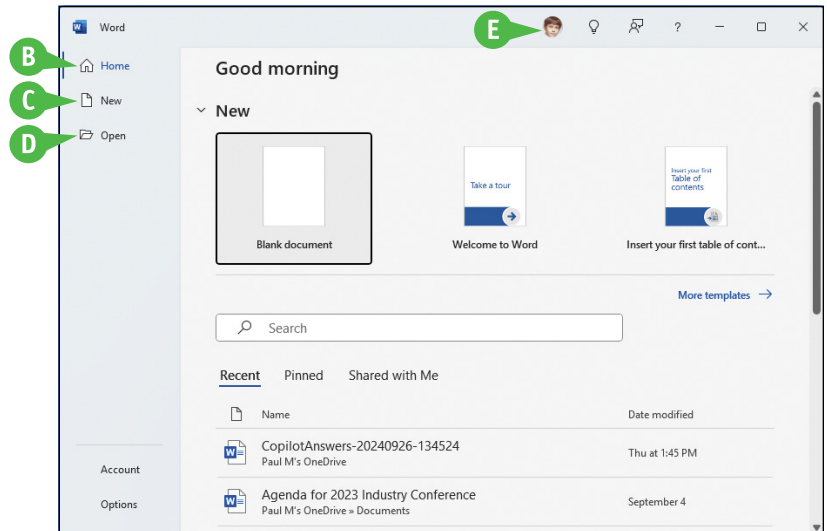
The app launches and displays its Start screen.

- 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: Refer to Chapter 3 for details about signing in to Microsoft 365.

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

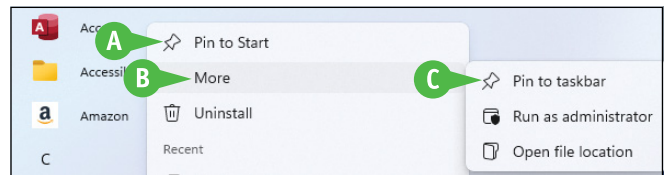
Note: If you have multiple documents open, you must click **Close** (X) for each file to exit the app.



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, click **Pin to Start** (A) to add the app to the Pinned section of the Start menu; or, click **More** (B) and then click **Pin to taskbar** (C) 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 will 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 your name appears, you are signed in to your Microsoft 365 subscription. You can click your avatar 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

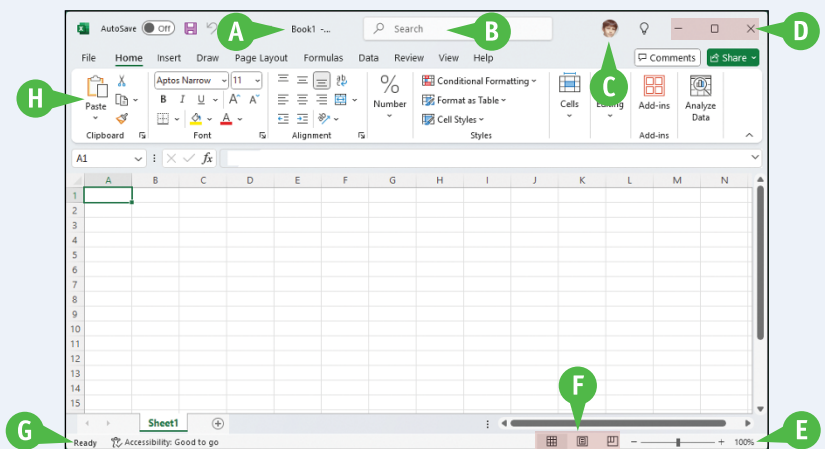
Switch to a different view of your document.

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.

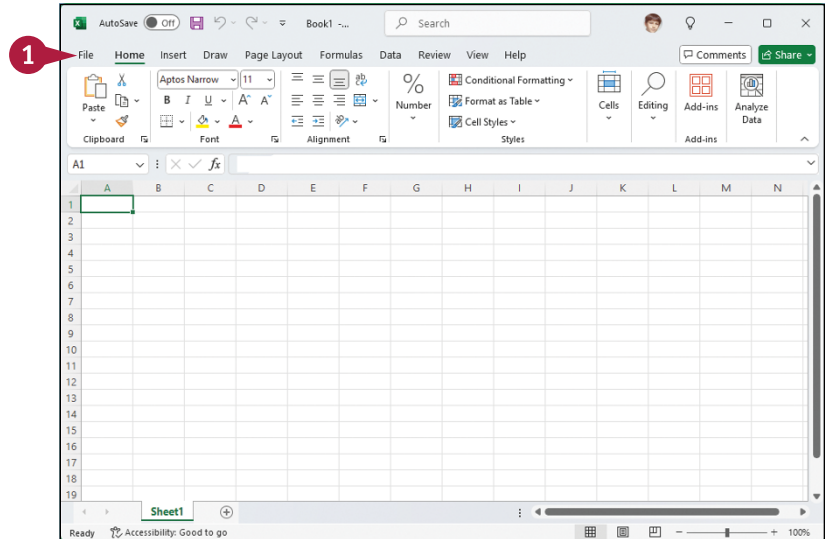


Work with Backstage View

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; distribute documents; and 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

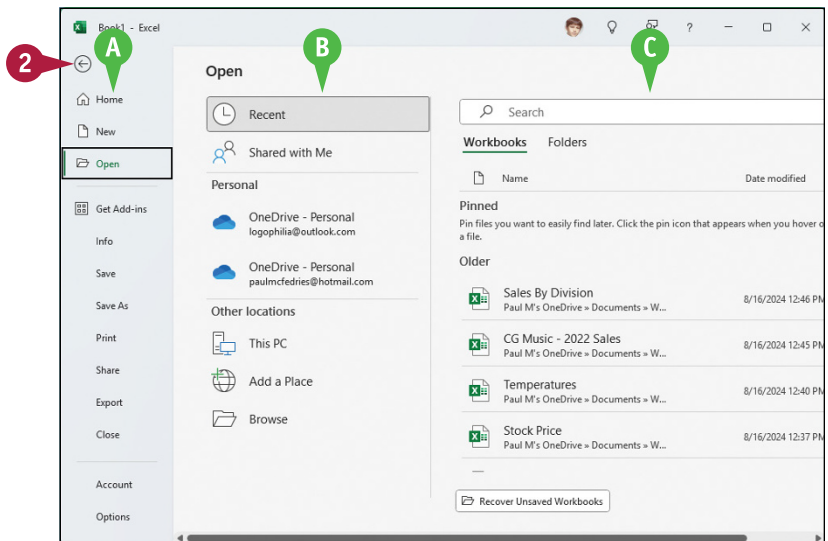
- 1 Click the **File** tab to display Backstage view.



- 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; rather, they take other actions.

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



Change the Color Scheme

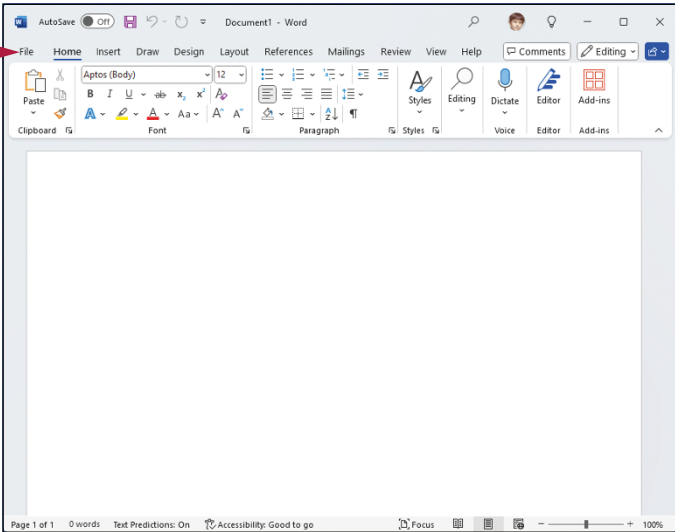
You can use Microsoft 365 themes and background patterns to change the appearance of the screen for every app. Themes control the color scheme the apps use, and background patterns can add interest to Backstage view. Color schemes can improve the look of each app's screen, but be aware that some schemes 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, refer to Chapter 3.

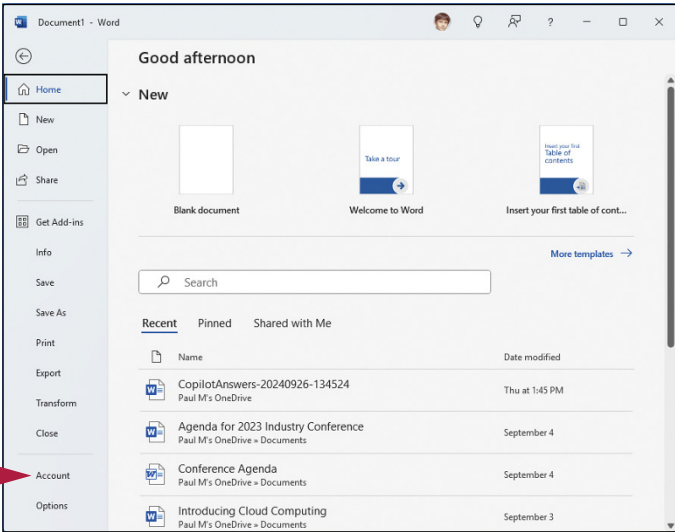
Change the Color Scheme

Note: Make sure you are signed in to Microsoft 365. Refer to Chapter 3 for details.

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



2 Click **Account**.

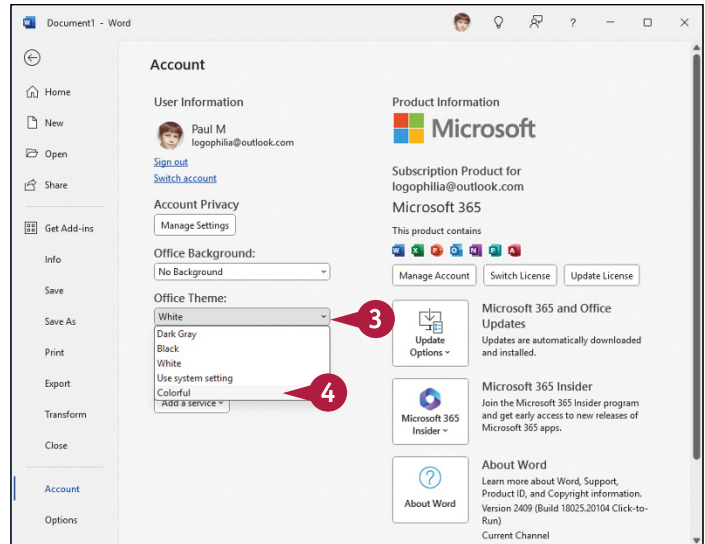


3 Click the **Office Theme** ▼.

4 Click a theme.

The colors of your app change.

Note: Some theme changes are more subtle than others.



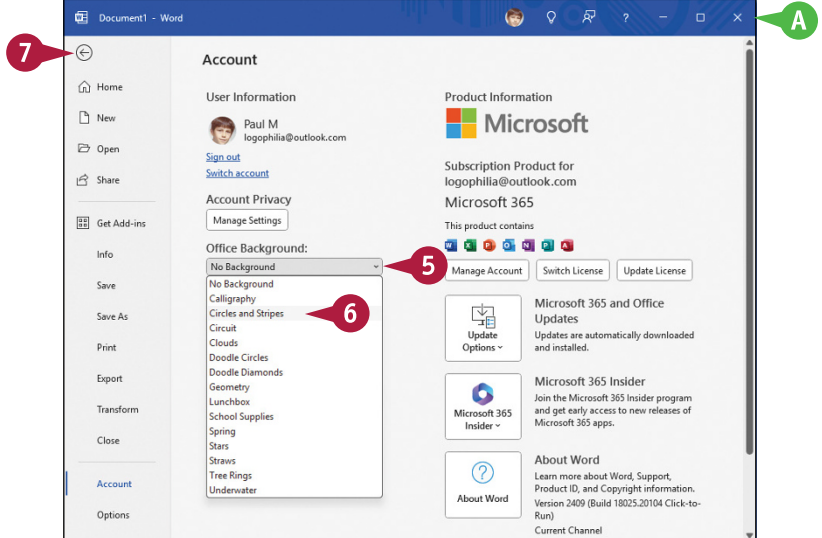
5 Click the **Office Background** ▼.

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.

Work with the Ribbon

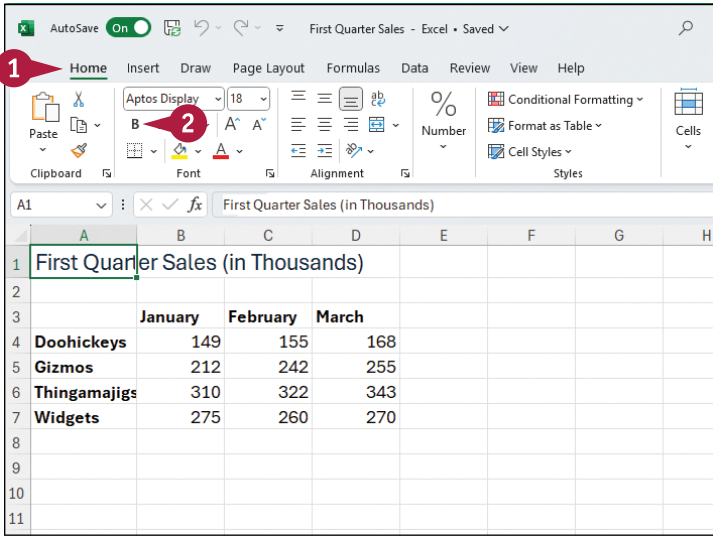
You use the Ribbon to access an app’s commands. The Ribbon is divided into tabs, the names of which vary depending on the app. Excel’s Ribbon, for example, includes tabs named Home, Insert, Formulas, and Data. Each Ribbon tab is divided into groups of related commands. The Home tab includes the Clipboard 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

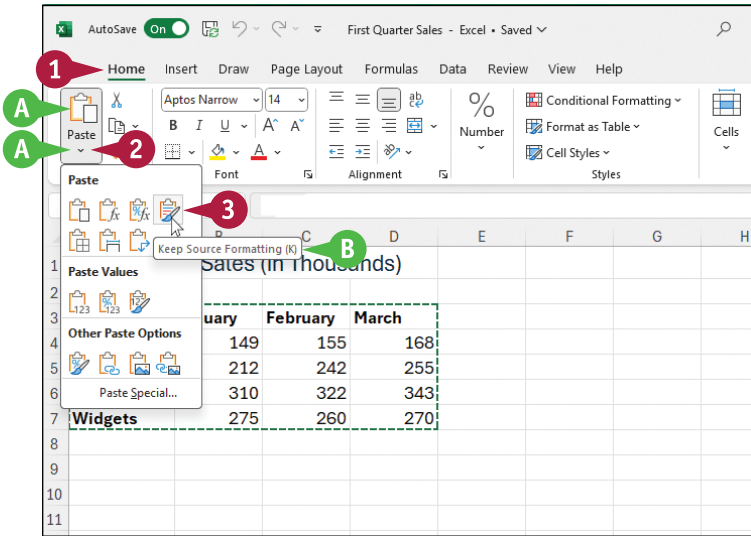
Run a Command

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



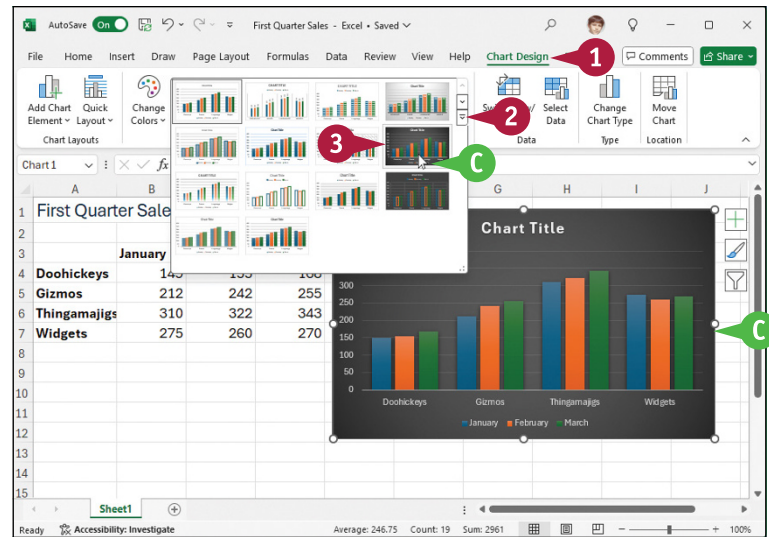
Run a Command from a Menu

- 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 Position the mouse (🖱️) over a command to display a tooltip that displays the command’s name.
- 3 Click the command you want to run.



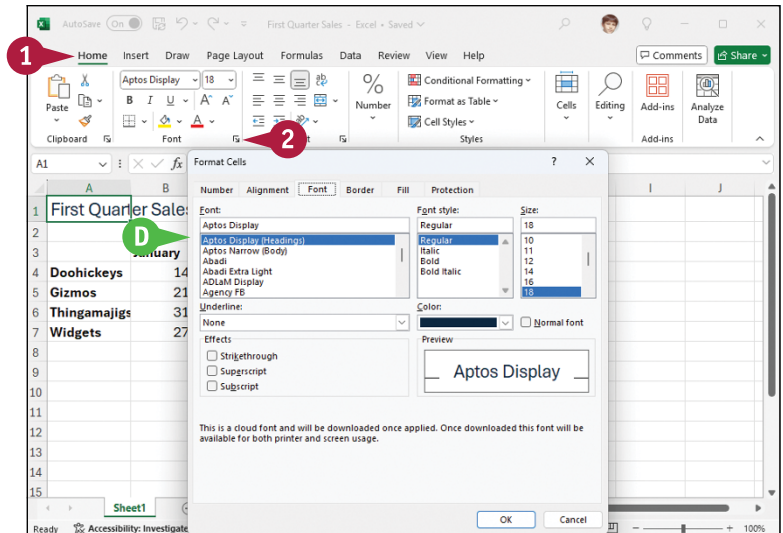
Choose an Item from a Gallery

- 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 position 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**. Now just the Ribbon tabs appear. You can display the full Ribbon temporarily by clicking a tab.

Select Data

You can select data in your file to perform different tasks, such as deleting it, changing its font or alignment, applying a border around it, or copying and pasting it. Selected data appears highlighted.

Depending on the app you are using, Microsoft 365 offers several different techniques for selecting data. For example, in Word, PowerPoint, Outlook, and Publisher, you can select a single character, a word, a sentence, a paragraph, or all the data in the file. In Excel and Access tables, you typically select cells. In OneNote, use the technique appropriate to the type of data you want to select.

Select Data

Select Data in Word, PowerPoint, or Publisher

Note: You can use this technique to select characters, words, sentences, and paragraphs.

- 1 Click to one side of the word or character that you want to select.
- 2 Drag the mouse (🖱️) across the text that you want to select.
 - A The app highlights the characters to indicate that they are selected.
 - B To cancel a selection, click anywhere outside the text or press any arrow key on your keyboard.

