

OVERVIEW

1

Introducing Microsoft Office and Using Common Features



In this chapter, you will be introduced to Microsoft Office and given an overview of the various versions of the software. Understanding what is offered in each will help you make the best decision about which version meets your needs. You'll also practice using some of the features that are common across the Office suite. Once you learn how to use a feature in one application, you can use the same or similar steps in the others.

LEARNING OBJECTIVES

- ▶ Describe similarities and differences between Office 2019 for the desktop, Office 365, and Office Online
- ▶ Identify uses of cloud storage
- ▶ Identify parts of the Office user interface
- ▶ Identify Office features available through Backstage view
- ▶ Use the Office Clipboard
- ▶ Format text in Office applications
- ▶ Search for Help within Office applications

Introduction to Microsoft Office

Microsoft Office is a **software suite** that enables users to create, format, revise, collaborate, and share files quickly across multiple devices. The Microsoft Office 2019 software suite for Windows includes **Word, Excel, Access, PowerPoint, Outlook, OneNote, Publisher, and Skype**. A software suite is a collection of applications generally produced by the same manufacturer and bundled together for a better price. Being produced by the same manufacturer also means that each application offers the same user interface. Examples of features shared among the different Office 2019 apps are the Ribbon, Quick Access toolbar, a spelling and grammar checker, and collaboration tools.

What Devices Will Microsoft Office Work With?

Microsoft Office works on desktops, laptops/notebook computers, and all-in-one PCs and Macs, as well as Windows, Android, and iOS smartphones and tablets (though some apps, like Publisher and Access, work only on PCs).

If you are writing a paper or preparing a business plan, you probably want to create it on a desktop, laptop, or all-in-one computer. If you want to open, read, share, or make simple changes to a Word document, you could select any device. This chapter assumes you will be using a desktop, laptop, or all-in-one computer.

To learn more about the operating systems (Windows, Android, macOS, or iOS) and types of devices (all-in-one computer, desktop, laptop, smartphone, or tablet) that will run Microsoft Office, do a web search for *Microsoft Office 2019 products*.

What Storage Does Microsoft Office Provide?

Microsoft OneDrive is the cloud storage location included with Microsoft Office 2019 and Office 365, and it provides a convenient way to save, store, and share files, photos, and videos via your computer, smartphone, or tablet anytime, anywhere, and on any device—provided you have an Internet connection or Wi-Fi access. Depending on the Microsoft Office product you use or purchase, you will receive anywhere from five gigabytes to five terabytes of OneDrive cloud storage.

You may want to use cloud storage as your primary saving method so you can access your files at home, at school, at work, or anywhere. Or you may decide to use cloud storage as a backup for your files located on your computer's hard drive or your flash drive. Instead of emailing files to yourself, use OneDrive as a faster way to store something in the cloud. To learn more about OneDrive, do a web search for *OneDrive*.

Which Microsoft Office Should I Use?

You may have heard others talk about **Microsoft Office 2019, Office 365, and Office Online** and are not sure which one is right for you. Base your decision on the apps and features you need, in addition to the pricing structure.

- ▶ **Office Online:** This version is free and requires a Microsoft account. It includes limited versions of Word, Excel, PowerPoint, and OneNote. No software is installed on your computer, as the apps are accessed and run in a web browser. The apps are not the same as the full-version apps in the other variations of Office and lack many features of those full versions. This version requires an Internet connection. Office Online is great for simple tasks, like writing a short letter or creating a basic slide show presentation.

- ▶ **Microsoft Office 2019:** This version is software that is purchased once and installed on one PC. It does not require an Internet connection to run. It does not have all the features of Office 365, and you must pay for future major upgrades. Choose from a variety of plans that may include Word, Excel, PowerPoint, OneNote, Outlook, Publisher, Access, and Skype.
- ▶ **Office 365:** This version requires users to pay a monthly or annual subscription fee for installing and using the software on one or more devices (PC/Mac and mobile devices). All upgrades are included, so you always have the latest-and-greatest version, and all Office 2019 apps are included. Microsoft says the Office 365 apps can include features not present in the Office 2019 apps, as Office 365 is updated more frequently than Microsoft Office.

While Microsoft Office has three distinct formats—Microsoft Office 2019, Office 365, and Office Online—and the examples provided in this chapter can work in each of the Office formats, this book assumes you are using Office 2019 on the desktop or Office 365 in a subscription-based plan, as well as Windows 10. Remember that Office 365 can change at any time. If you are using Office 365, keep in mind that your screen may not match all the illustrations in this book. Changes made to Office 365 after publication of this title may result in additional differences between your book and the software.

What Are the Microsoft Office Apps?

In this chapter, you will learn about four of the Microsoft Office applications included in the Microsoft Office suite: Word, Excel, Access, and PowerPoint.

Application	What It Is Used For
Word 	Word-processing software used to create, edit, format, and share documents like letters, reports, essays, and business plans.
Excel 	Spreadsheet software, arranged with rows and columns, used to perform calculations and analyze numerical data. Use Excel to prepare a budget or income statement, or to determine the amount of interest paid on a loan.
Access 	Database software that stores and helps you quickly retrieve data. In Access, you create and enter data into a table and then use forms, reports, and queries to display the desired results.
PowerPoint 	Presentation software used to create, edit, format, and share slides designed to tell a story, market a product, or explain a concept.

The Microsoft Office suite includes the following additional applications:

Application	What It Is Used For
OneNote 	Note-taking software used to organize notes (handwritten or typed), audio recordings, screen captures, or sketches you have collected or created to share with others.
Outlook 	Personal information management software used to create, send, and receive emails, record tasks, maintain one or more calendars, schedule meetings and appointments, manage contacts, and take notes.
Publisher 	Desktop-publishing software used to design and lay out text and images, often for newsletters or brochures.
Skype 	Internet communication software used to share audio, video, text, messages, files, or desktop screens.

Microsoft Accounts

A **Microsoft account** provides you with access to your Microsoft settings, files, contacts, and more. A valid Microsoft account can include Hotmail, Bing, MSN, Office, OneDrive, Outlook, Skype, Store, Windows, or Xbox Live. Once logged in to your computer, you can log in to your Microsoft account from any Office app. If you do not have a Microsoft account, you can create one for free by doing a web search for *Microsoft account*.

Common Features in Microsoft Office Apps

The Office 2019 applications share some frequently used features. They include the Ribbon, Quick Access toolbar, and common commands.

The Ribbon

Within each application, you will find the Ribbon displayed along the top of the window. The Ribbon contains tabs and commonly used buttons and other icons that are specific to the application. The buttons are arranged in groups within each tab. While the Ribbon changes with each application, some tabs, groups, and commands are common throughout the Microsoft suite. In this chapter, we will look at the Access Ribbon and, specifically, the File, Home, Create, External Data, Database Tools, and Help tabs.



View the video “Ribbon Overview.”

The Quick Access Toolbar

Each application has a one-line Quick Access toolbar located, by default, in the top-left corner of the application window. This helpful toolbar contains some frequently used commands to help you be more efficient as you work. You can customize the toolbar with the buttons you use most frequently. The settings for each application’s Quick Access toolbar work independently; therefore, you need to customize the Word, Excel, Access, PowerPoint, and Outlook Quick Access toolbars separately.



View the video “Quick Access Toolbar Overview.”

Undo/Redo

Within any application, you may type text or perform a command or action and then change your mind about what you did. As long as you have not exited the application, you may be able to undo the action.

Note!

Some actions, such as saving or sharing, cannot be undone.

You may want to redo an action you just undid. Sounds confusing, right? Use the Redo button to undo the undo, or to reapply the action. This puts the command or action you just undid back into effect.



Undo and Redo on the Quick Access toolbar

The Undo and Redo commands in Access operate differently from the same commands in other Office applications. Because of a database's nature, many changes made within Access, such as creating an object or deleting a record, cannot be undone or redone. Also, the Undo and Redo commands do not function the same across all object types.

Tip!

In Access, the Undo and Redo commands are most often used while working with text entry and control design.

 Quick Access toolbar → Undo  or Redo 

DEVELOP YOUR SKILLS: O1-D1

In this exercise, you will use the Undo and Redo buttons.

1. Log in to your computer, start Access, and tap **[Enter]** to accept the default template Blank Database.
2. Click the **Create**  button.
A new database has been created using the default name Database1 and placed in your Documents folder. You can delete this file after the chapter exercises if you like.
3. Type **Hello** and tap **[Enter]**.
4. Type: **Field**
5. Click the **Undo**  button once to remove the word *Field*.
6. Type **Record** and tap **[Enter]**.
7. Click the **Undo**  button once to remove the word *Record*.
*Because you tapped **[Enter]**, the database created a new record. Using the Undo command in this instance would remove the entire record and not just the word Record.*
8. Keep Access open.
Unless otherwise directed, always keep any files or programs open at the end of an exercise.

Common Features on the File Tab

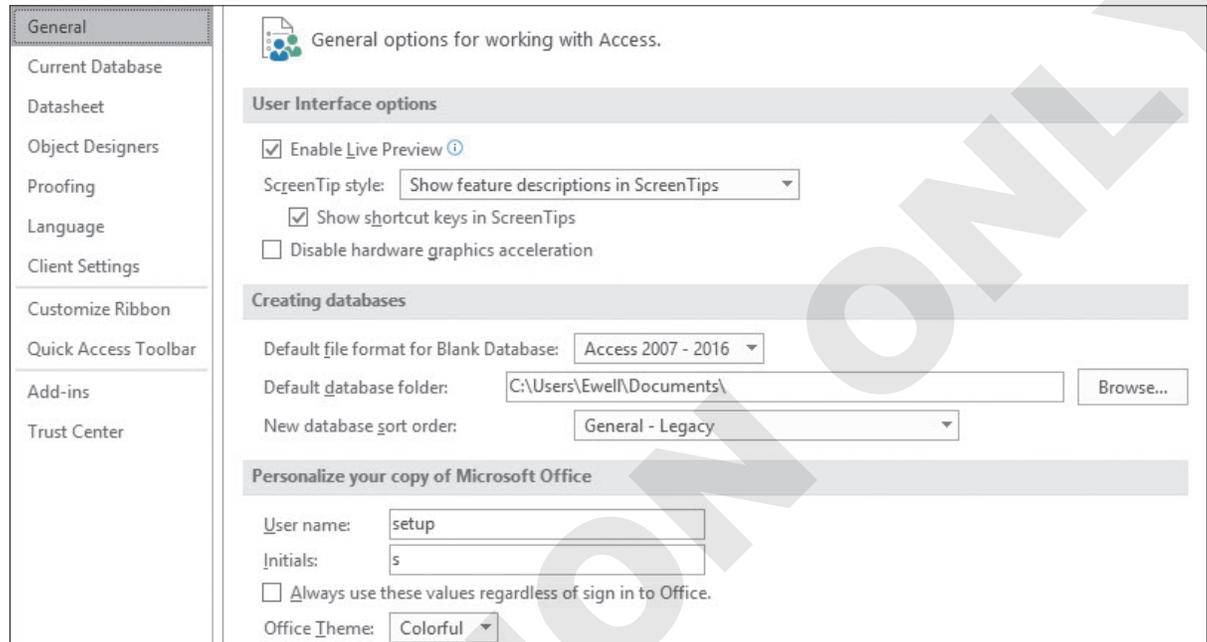
In this section, you will learn about the features on the File tab that are used in a similar manner throughout multiple Microsoft applications, including Word, Excel, PowerPoint, and Access. Here you will use Microsoft Access to save, close, open, and print.

Backstage View

When you are working in your file and open the File tab, the Backstage view displays. Think of your Backstage view as your personal manager for the open file and application. Use the Backstage view to update file information, select account settings, view program options, open new files, save, print, and provide feedback to Microsoft, and recover unsaved files. These are the “big-picture” items you do to your file and not the specific tasks you perform using the other tabs on the Ribbon.

Program Options

Microsoft provides preference settings that you can customize for each application (that is, Access or Word) so they are automatically applied each time you use the application on your device. To change your preferences, use the Options feature on the File tab. Some custom options include adding your username and initials, saving files to a default file location, and customizing the Ribbon.



Options include allowing you to set defaults for the file format and personalizing with username and initials.

☰ File→Options

Saving Files

In most Office applications, you should save frequently to prevent data or information loss. Some people prefer to save important files every few minutes, while others save at less frequent intervals.

When an Access file is created, it is also named and saved in the location chosen by the user. A key feature of Access is that your file will constantly save as changes to data or objects are entered or updated. Because of this feature, you will not need to utilize the save settings reserved for other Office applications (Word, Excel, PowerPoint). However, it is still good practice to use the saving commands, especially when working on major design or layout changes.

The saving commands are found on the File tab, and you'll see different options, including Save and Save As. In Access, these commands work to save either an individual object within the database or to save the entire database file.



View the video “Using Save and Save As.”

An Access database file is most likely to be saved to a shared location such as SharePoint. In a small organization a file may be saved to a personal device (for example, on the hard drive of a PC). Depending on the file size, it could possibly be saved to a flash drive or to the cloud in OneDrive.

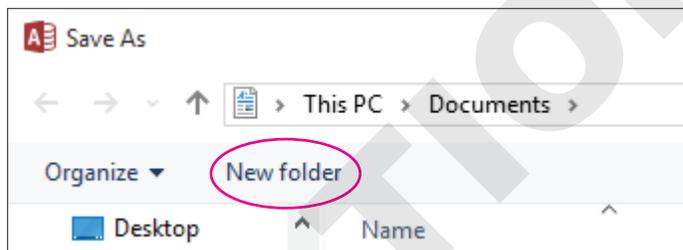
☰ File→Save or Save As

DEVELOP YOUR SKILLS: O1-D2

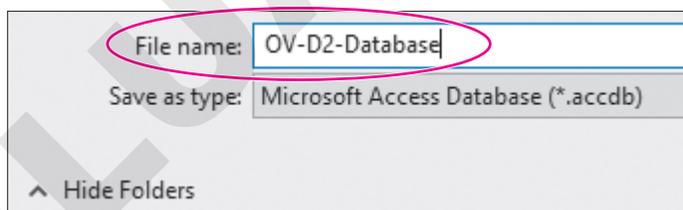
In this exercise, you will use *Save* to save an open object and *Save As* to store an Access database file in a new folder.

Before You Begin: Be sure to visit the Learning Resource Center at labyrinthlab.com/lrc to retrieve the exercise files for this course and to determine your file storage location before beginning this exercise.

1. In your open Access database, choose **File** to display the Backstage view and then click **Save**.
Because *Table1* is open, Access prompts you to save this object by opening a dialog box.
2. In the Save As dialog box, type **New Table** for the table name and then click **OK**.
Notice the table name has changed and is indicated in the object tab.
3. Choose **File** to display the Backstage view and then click **Save As**.
4. Verify the Save Database As option is chosen from the File Types menu on the left and the Access Database option is chosen to the right.
5. Click the **Save As**  button and then choose **Yes** to close all objects.
6. In the Save As dialog box, navigate to the **Overview Chapter 1** folder in your file storage location.
7. Click the **New Folder** command located to the right of the Organize command, just under the address bar.



8. Type **My Database** for the new folder name and tap **Enter** twice.
9. Click in the **File Name** box and type: **OV-D2 - Database**



10. Click the **Save** button.
11. Click **File** to display the Backstage view and then click **Close**.

Finding, Searching, and Opening Files

Files can be opened within an application by using the Open dialog box, choosing from a recently saved files list within the application, using File Explorer, or typing the filename in the Windows Search box. Within Windows 10, as well as previous versions of Windows, you can use File Explorer to locate and manage your files. You can click the File Explorer icon on the taskbar and then search for files located on your PC, flash drive, or OneDrive.



View the video “Opening Files.”

Printing

If you are connected and have access to a printer, you should be able to print. Before printing, you should verify formats, ensure proper layout, and review the file to see if you have used the fewest possible number of pages. Use the Print Preview feature to browse the pages before printing so you don't waste time or printing resources, and use the options in the Settings area to adjust elements such as page orientation, paper size, margins, and more.

Keep in mind that you can print to paper or to PDF if you want to be eco-friendly.



View the video “Printing Files.”

☰ File→Print

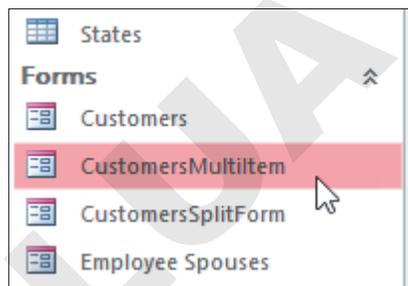
DEVELOP YOUR SKILLS: O1-D3

In this exercise, you will open an Access database file using Windows Explorer and then print an Access object.

1. Ensure that Access is open and then click the **File** tab to display the Backstage view.
2. Choose **Open**.
3. Open **OV-D3-WinDesign** from your **Overview Chapter 1** folder.
4. Click **Enable Content** if the Security Warning bar displays.

The Security Warning appears whenever a database file is opened for the first time. When working with the files that correspond to this text, you should always click the Enable Content button that appears. You should never open files unless you know or trust the file sender.

5. Save your database in the same location as: **OV-D3-WinDesignRev**
6. Choose the **CustomersMultiItem** form located in the Navigation pane on the left by clicking the form name (don't double-click).



7. Click the **File** tab.
8. Choose **Print** from the menu and then choose **Print Preview**  from the list of options to the right.

The object opens in Print Preview.

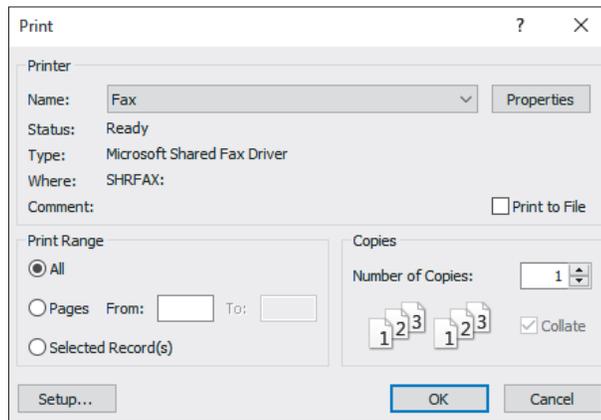
9. Choose **Print Preview**→**Zoom**→**Two Pages** .

The form is currently set to print across two pages with only a portion of the fields printing on the second page.

10. Choose **Page Layout**→**Landscape** .

The entire form is now set to print across the length of one page.

11. Choose **Print Preview**→**Print**→**Print**  to open the Print dialog box.



The Print dialog box allows you to set the print range and the number of copies and select which printer will perform the job.

12. Click the **Cancel** button at the bottom right of the dialog box.
13. From the Ribbon, click **Close Print Preview** .

Templates

A template is a database that has created objects with preconfigured fields, relationships, and settings. The fonts, styles, and object and control layout settings such as orientation and size may already be built in. Instead of creating each object and selecting these settings when you prepare a blank database file, you may opt to use a template to save time.

In most Office applications including Access, you can search for online templates using the Search feature available when you create a new database. Templates are arranged according to categories; for example, by business, personal, and industry.

Most Office applications include sample templates that are stored on the hard drive of your computer when you install the software. Access does not include this feature because of large file sizes of most database templates.

 File→New

DEVELOP YOUR SKILLS: O1-D4

In this exercise, you will open a prebuilt database template. You will need an Internet connection to complete this exercise.

1. Choose **File**→**New** and then select the **Students Database** template.
2. Name the database **Students** and click **Create** .

Explore the database. Notice the many objects available in the Navigation pane to the left. Open and explore a few objects of your choice by double-clicking on the object's name.

3. Click **File** to display the Backstage view and then click **Close** to close the database without saving.

Common Features on the Home Tab

In this section, you will learn about the features on the Home tab that are used in a similar manner throughout multiple Microsoft applications, including Word, Excel, Access, and PowerPoint. You will

use Microsoft Access to **Cut**, **Copy**, and **Paste** with the Office **Clipboard**; format text; use the Mini toolbar; and find and replace text.

The Office Clipboard

Located at the far left on the Home tab, the Clipboard group contains the Cut, Copy, Paste, and Format Painter buttons. Selecting the Clipboard dialog box launcher opens the Clipboard pane, which displays at the side of your application. The Clipboard contains **thumbnails** (small images) of what you have recently cut or copied from your Microsoft Office file(s) during your Windows session, with the most recent item at the top of the list.

You can use the Clipboard to quickly paste text, pictures, or other images into your file. You can paste all items on the Clipboard into your file(s) as many times as desired, and you can clear all items from the Clipboard. The Cut feature in the Clipboard group allows you to cut data, and then paste it in the desired location. When data is cut, the original selection is removed from the **source** location and is pasted at the **target** location. When data is copied, the original selection remains in the source location and a new selection is pasted at the target location.



View the video “Clipboard Overview.”

CLIPBOARD FEATURES

Feature	What It Does
Cut 	Cut: Removes the original selection from the <i>source</i> location and places the selection on the Office Clipboard.
Copy 	Copy: Creates a duplicate of the original selection, which remains in the source location, and places a copy of the selection on the Office Clipboard.
Paste 	<p>Paste: Inserts a copy of the most recent item found on the Office Clipboard at the <i>target</i> location, or destination. Depending on the application, there are usually at least three paste choices: Keep Source Formatting, Merge Formatting, and Keep Text Only.</p> <p>Keep Source Formatting: Pastes the text and the formatting (bold, italic, underline) of the selection from the source location to the target location. The selection pasted retains the original formatting from the source location.</p> <p>Merge Formatting: Pastes the text and formatting (bold, italic, underline) of the selection from the source location to the target location and combines it with any formatting that is already at the target location. The selection pasted has formats from both the source and target locations.</p> <p>Keep Text Only: Pastes the selection from the source location to the target location. The selection pasted takes on the formatting of the target location.</p>
Format Painter 	<p>Format Painter: Applies the character and paragraph formatting from the source selection to any characters or text selected.</p> <p>Double-click the Format Painter to apply formats to multiple selections. Click the Format Painter button to turn it off when you are finished.</p>

☰ Home→Clipboard→Cut  | **Ctrl**+**X**

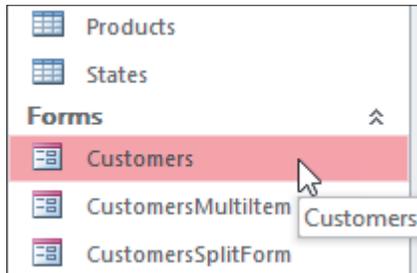
☰ Home→Clipboard→Copy  | **Ctrl**+**C**

☰ Home→Clipboard→Paste  | **Ctrl**+**V**

DEVELOP YOUR SKILLS: O1-D5

In this exercise, you will use Access to copy data from the source destination to the target destination. You will also use a form control and cut data from its original location and paste it into the target location.

1. Ensure that Access is open and then choose **File** to display the Backstage view.
2. Choose **Open**.
3. Open **OV-D3-WinDesignRev** from your **Overview Chapter 1** folder and save it as: **OV-D5-WinDesignRev**
4. Open the **Customers** form located in the Navigation pane on the left by double-clicking the form name.



The form opens in Form View. Now you will move text from one field to another using the Cut command.

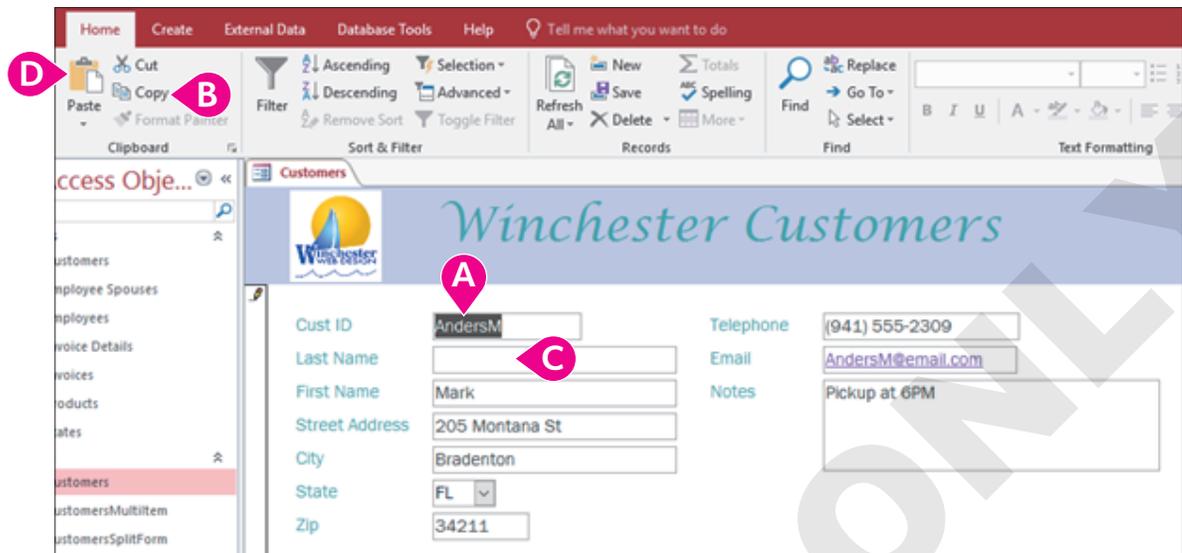
5. Follow these steps to cut data from the selection and paste to the target:



- A Highlight the text **Pickup at 6PM**, located in the Last Name text box.
- B Choose **Home**→**Clipboard**→**Cut** .
- C Click the **Notes** text box.
- D Choose **Home**→**Clipboard**→**Paste** .

The note has been moved to the Notes text box and the Last Name textbox is now blank. Next you will use the Copy command.

6. Follow these steps to copy data from the selection and paste to the target:



- A** Highlight the text **AndersM**, located in the Cust ID text box.
- B** Choose **Home**→**Clipboard**→**Copy** .
- C** Click the **Last Name** text box.
- D** Choose **Home**→**Clipboard**→**Paste** .

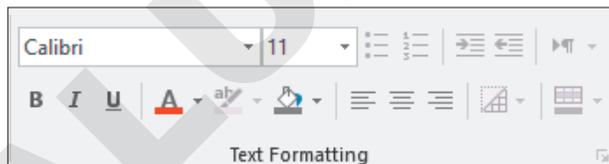
The data appears in both the Cust ID and the Last Name text box. Now you will make a final edit to the Last Name field.

7. Tap the **[Backspace]** key one time to remove the M.

Leave the form open for the next exercise.

Formatting Text Using Text Formatting Group Settings

To make your selection more visibly appealing and easy to read, you may want to use some or all of the font formats available in the Text Formatting group. To apply the formats, you must first select text.



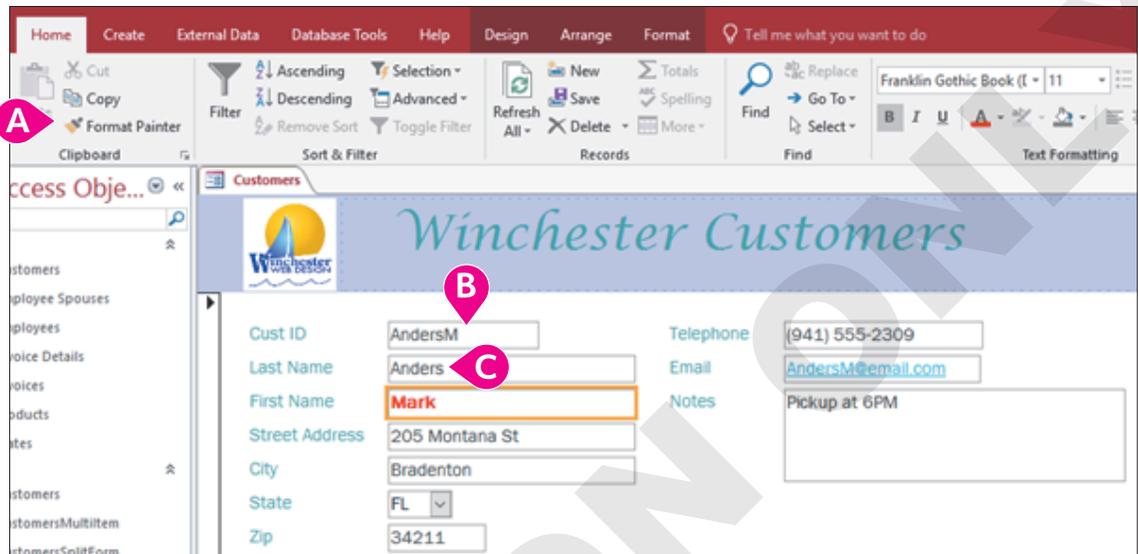
The **Format Painter** applies multiple formats located in one control to another within the object. Think of the selected control as your paint can. You apply the formats found in your paint can, the selected control, to another control with the help of the paintbrush, or Format Painter. Whatever control you select gets the formatting. You can use Format Painter to format multiple controls by double-clicking the Format Painter button. To turn off the multiple-use feature and stop “painting,” tap the **[Esc]** key.

DEVELOP YOUR SKILLS: O1-D6

In this exercise, you will make text bold, change the font color, and use the Format Painter.

1. Choose **Home**→**Views**→**View** to switch to Layout View.
2. Select the **First Name** text box.

3. Choose **Home**→**Text Formatting**→**Bold** **B**.
4. Choose **Home**→**Text Formatting**→**Font Color** **A**.
Text in the First Name text box is now formatted to bold and red.
5. Follow these steps to apply formatting taken from the selected text to the chosen target using Format Painter:



- A** Double-click the **Format Painter** button.
- B** Click the **Cust ID** text box.
- C** Click the **Last Name** text box.

The same formatting applied to the First Name text box is now applied to both Last Name and Cust ID text boxes.

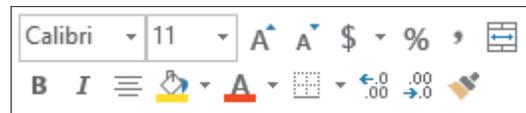
Leave the form open for the next exercise.

The Mini Toolbar

The Mini toolbar is a floating toolbar that contains some of the more commonly used formatting buttons found on the Home tab and specific to the application. The Mini toolbar appears at various times in all the Office applications, giving you a convenient way to choose the most commonly used commands.

Note!

In Access, the Mini toolbar appears only if you are working with rich text. By default, the text properties for most data types is plain text so you will not likely see the Mini toolbar unless you have changed the field settings.



The Mini toolbar in Access (left) and Word (right)

DEVELOP YOUR SKILLS: O1-D7

In this exercise, you will use the Mini toolbar in Access to apply formatting.

1. Choose **Views**→**View** to change to Form View.
2. Highlight the text **6PM** in the Notes text box.
The Mini toolbar appears.
3. In the Mini toolbar, click the **Bold** **B** button and the **Font Color** **A** button to apply red formatting.
4. Click anywhere in the form to close the Mini toolbar.
5. Click the **Close** **×** button at the far right of the Customers tab.



6. Click **Yes** when prompted to save your changes to the Customers form.

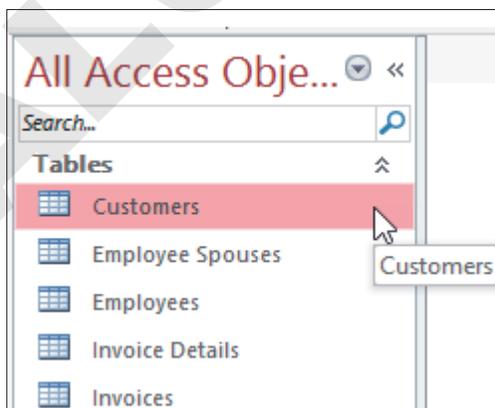
Find and Replace

Within a database you may need to locate text quickly. You may also need to substitute data for something else. The Find command is used to search for characters, symbols, numbers, words, phrases, or any other data that meet the criteria. The Replace command first finds whatever meets the criteria and then replaces it with data you desire.

DEVELOP YOUR SKILLS: O1-D8

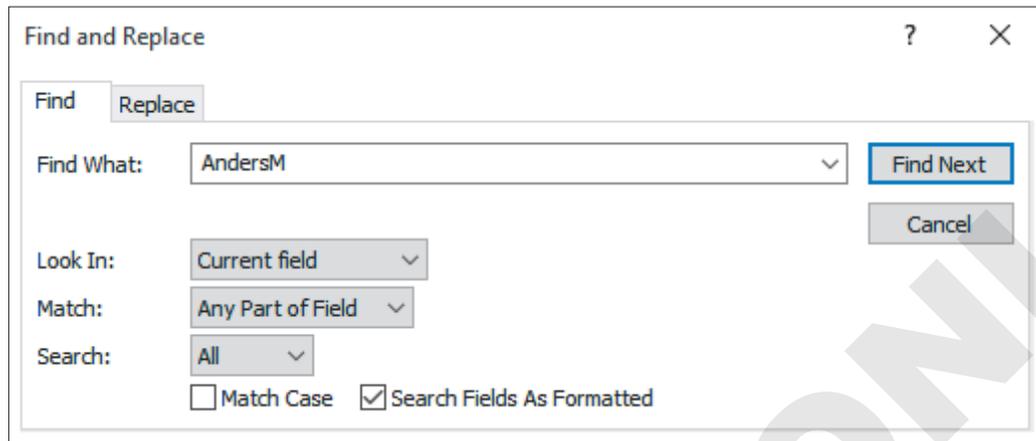
In this exercise, you will use the Find command to locate the word dogs and then replace each occurrence with puppy.

1. Open the **Customers** table located in the Navigation pane on the left by double-clicking the table name.



- Choose **Home**→**Find**→**Find** .

The Find and Replace dialog box opens.

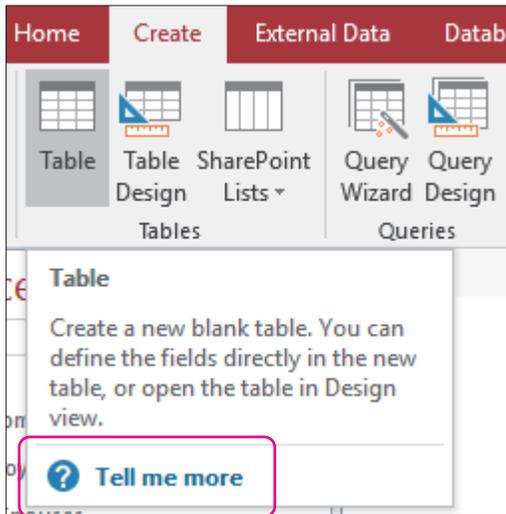


- Click the drop-down arrow for the **Look In** option and choose **Current Document**.
 - Click the drop-down arrow for the **Match** option and choose **Any Part of Field**.
 - Type **dogs** in the Find What box.
 - Click **Find Next**.
- The word *dogs* is highlighted in the table.
- Click the **Replace** tab in the Find and Replace box.
- Verify that the Find What box displays *dogs*.
- Type **puppy** in the Replace With box.
 - Click **Replace All** to change the one occurrence of the word *dogs* to *puppy*.
 - Click **Yes** in the Microsoft Access message box.
 - Close the Find and Replace box.

Help

When you are working in Microsoft Office, you may need to find out more about a topic as it relates to the application. Located to the right of the last tab on the Ribbon is the *Tell Me What You Want to Do* box. This box provides a quick way to access help or learn more about a feature in the application. When you click the box, suggestions related to the application display. Use the text box to enter words or phrases describing what you would like to do or locate next in the application. You can use the Tell Me... box to research or explain the meaning of a term with Smart Lookup. To view a list of Help topics, tap the **F1** function key on the keyboard.

Another Help feature is the *Tell Me More* link that may display at the bottom of a button's help tip. When you click the link, the Help window displays with more information about the specific feature. Using this method, you learn more about the feature without typing any search text.



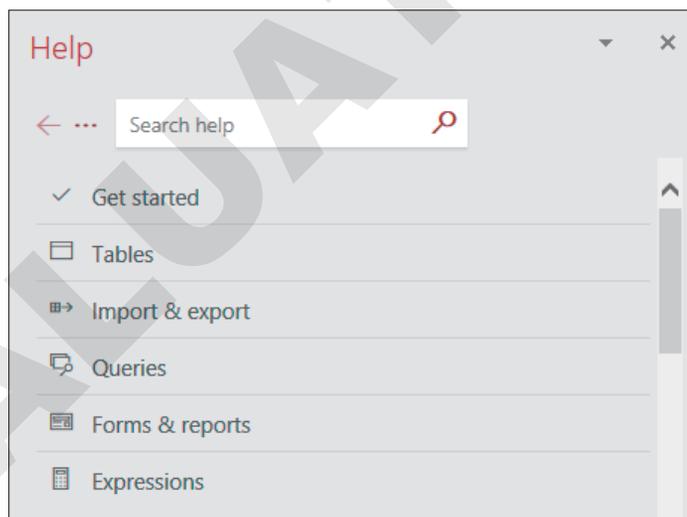
Some buttons display robust ToolTips with a Tell Me More link when you point to them.

DEVELOP YOUR SKILLS: O1-D9

In this exercise, you will explore the Help and Tell Me More features.

1. With your Access database open, tap the **[F1]** key.

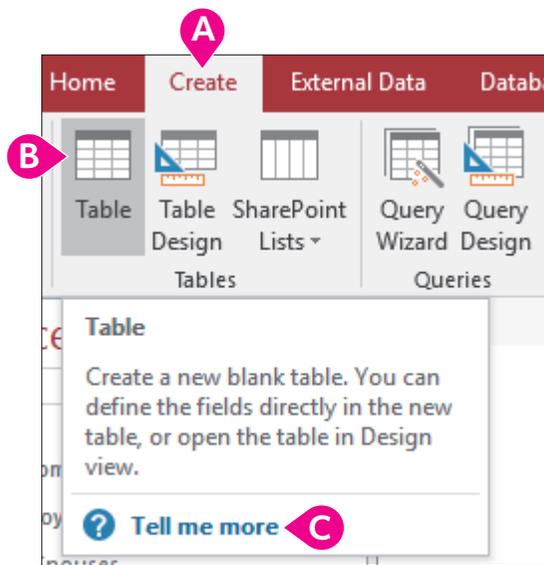
The Access 2019 Help window appears.



2. Click in the **Search Help** box, type **Tables**, and press **[Enter]**.

Search results display numerous articles that include or relate to the topic of Tables.

3. Close the Help window.
4. Follow these steps to open the Tell Me More link for the Table command:



- A Click the **Create** tab in the Ribbon.
- B In the Tables group, hover your mouse pointer over the Table command (don't click).
- C Click the **Tell Me More** link at the bottom of the ToolTip.

The help window opens with topics related to the Create Table command.

5. Close the Help window and then **Close**  Access.