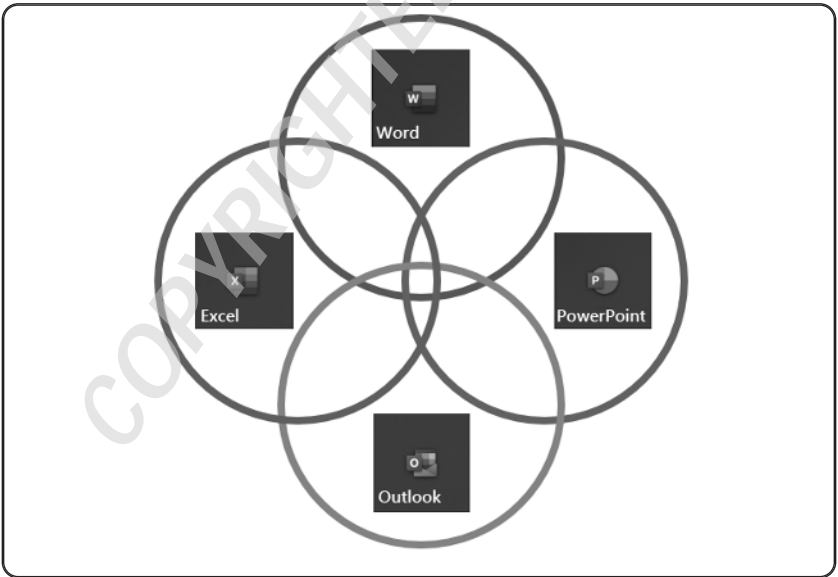


# How Do I Start Using Microsoft 365?



The Microsoft 365 applications, or apps, are easy to navigate yet loaded with powerful features designed to save you time and work. The core apps this book covers—Word, Excel, PowerPoint, and Outlook—share similar commands and procedures, meaning skills learned in one app translate smoothly to the other apps. Dialing in on all the basics will enable you to spend more time developing content. This chapter introduces you to the “must know” skills for your work in Microsoft 365, including essential command and interface navigation features, key techniques for creating and working with files, making selections, copying and moving information, and proofing content.

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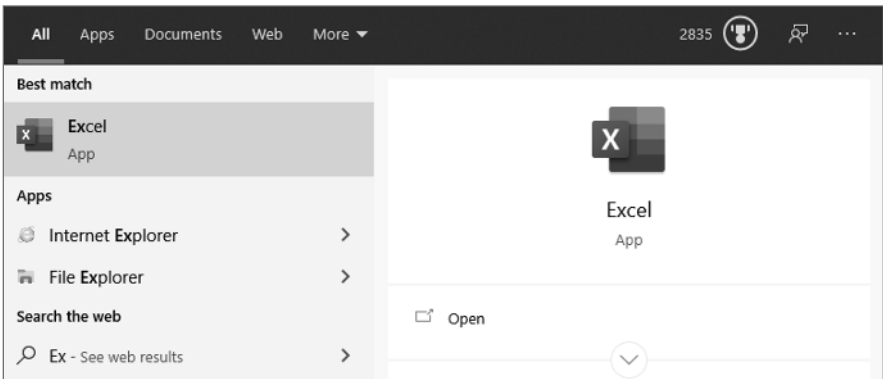
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# Starting and Exiting an App

Windows 10 gives you a few options for starting a program so that you can get to work. You may already have your preference for how to start up, but if not, you can try one of these methods:

- **Start button.** Click the Start button at the left end of the Windows taskbar. Move the mouse pointer over the right edge of the list of programs in the Start menu so that a scroll bar expands, and then use the scroll bar or the scroll wheel on your mouse to scroll down until you see the Microsoft 365 app that you want to start, such as Word, in the list. Then choose the app name. You also can pin a larger tile for starting an app to the right side of the Start menu. Right-click the app name in the list of Start menu programs, and choose Pin to Start. Then you can open the Start menu and click the large tile. If you need to remove the tile later, right-click it, and choose Unpin from Start.
- **Windows logo key.** Press the Windows logo key on your keyboard. Press the down arrow on your keyboard as needed until the app name is selected, and then press Enter.
- **Search box.** Click in the Search box to the right of the Start button on the taskbar. If a tile for the app appears in the Top Apps section, click it. If not, start typing the app name, such as **Excel**, and then choose the app when it appears under Best Match, as shown in Figure 1.1.



1.1 Choose the app name when using Windows Search to start a Microsoft 365 app.

Additionally, if you choose Office from the Start menu, an Office window with icons for all your apps opens. You can click an app's icon to be prompted to create a document and open the app, and you can leave this window open to launch other Microsoft 365 apps as needed.



### Genius

If using the Start menu to launch a Microsoft 365 app isn't for you, then you can pin a button for the app to the taskbar. With the app open, right-click its button on the taskbar, and then choose Pin to Taskbar. Click the pinned button on the taskbar to start the program. If you decide you want to unpin the button, right-click it on the taskbar and choose Unpin from Taskbar.

When Word, Excel, or PowerPoint open, they prompt you to create a new document or open an existing one. (Outlook works a little differently when you start it.) The later section called "Working with Files" provides more details about those choices. For now, you could just click the Blank Document, Blank Workbook, or Blank Presentation thumbnail to create a new file.

When you've finished all your work for the day, you should close or exit the program. You could shut down Windows without closing open apps, but it's better to close the app first to ensure you've saved all your work. As when starting an app, you have these options for closing or exiting the program:

- Click the Close (X) button at the upper-right corner of the screen.
- Press Alt+F4.

To close the current file without exiting the app, click the File tab near the upper-left corner of the window, and then choose Close. If you have a file with unsaved work open and exit the app or close the file, a message box asks whether you want to save changes to the file. You can click the Save or Don't Save button as needed.



### Caution

If you have multiple Word, Excel, or PowerPoint files open or multiple Outlook windows open, closing one of them doesn't close down the program overall. You have to close every open file or window to make sure you've completely exited the program.

# Taking a Look Around

You interact with the Microsoft 365 apps through their *user interfaces* or *UIs*. Microsoft specifically designs the user interface in each of the Microsoft 365 apps to have similar features, making it easier to perform similar tasks from app to app. The apps still have their differences, which I'll highlight in the areas where I cover the individual apps. Let's start first, however, with the UI features that the apps have in common.

**Note**

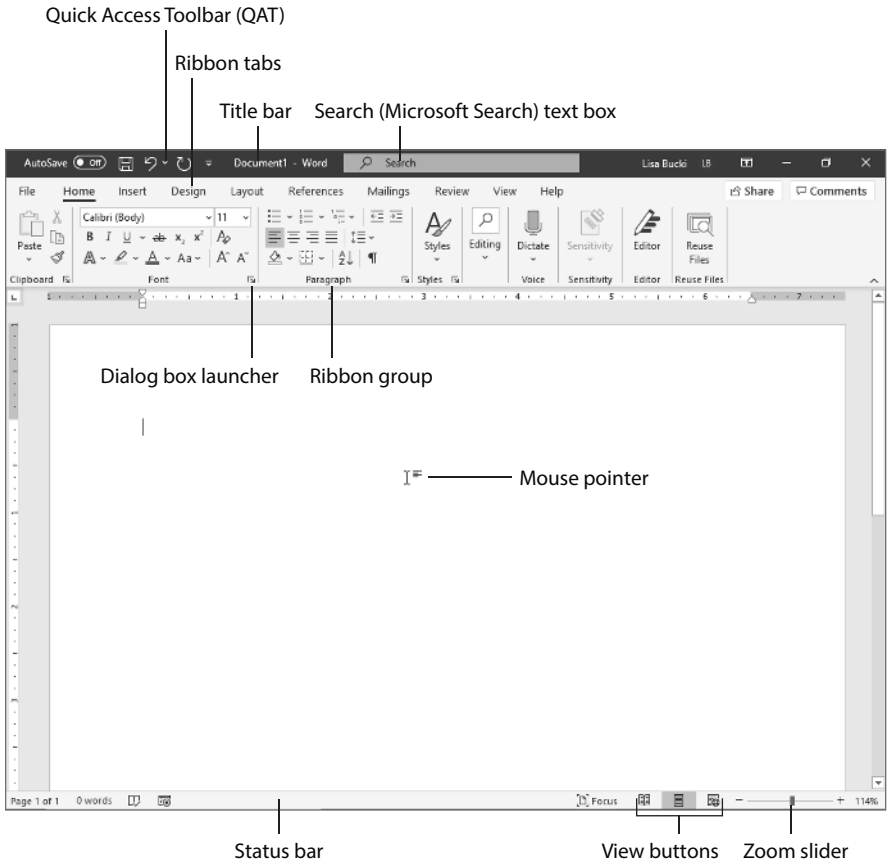
The Account (or Office Account in Outlook) choice on the File tab takes you to a screen where you can sign in and out of your Microsoft 365 subscription and manage updates to the apps, among other choices. The Options choice on the File tab opens an Options dialog box where you can change settings affecting how the app appears and behaves.

## Reviewing key screen features

The common interface features in the Microsoft 365 apps enable you to identify the file, give commands, work with the content in your documents, view status information, and change the document view. Figure 1.2 illustrates these common features. (I'll cover screen features specific to the individual apps throughout the book as needed.)

Here's what you need to know about the screen features shown in Figure 1.2:

- **Title bar.** The title bar identifies the name of the current file and holds other tools.
- **Quick Access Toolbar.** Found at the left end of the title bar, the Quick Access Toolbar (QAT) offers Save, Undo, and Redo buttons by default. The Undo and Redo buttons become active after you start performing actions. Clicking the down arrow at the right end of the QAT opens the Customize Quick Access Toolbar menu, where you can choose the name of another button that you want to add to the QAT.
- **Ribbon.** The ribbon below the title bar uses tabs to organize the majority of the commands that you'll use in your apps. Click a ribbon tab to see its commands. The names along the bottom of the ribbon identify commands that are grouped together because they have related or similar functions. In most cases, you click a button on the ribbon to choose a command, though clicking a button with a drop-down list arrow on it opens a list of additional choices. Still other ribbon buttons are split, with both a regular button on the top and a down arrow on the bottom part of the button. Clicking the top half of a split button executes the command immediately, while clicking the bottom part with the arrow opens a list of choices. Other buttons are split the other way, with the main button on the left and a drop-down list arrow on the right. Pressing the Alt key displays letters and numbers, sometimes called *keytips*, that you can press to choose a ribbon tab and then a command.



1.2 You will work with these tools in Microsoft 365 apps.



**Note**

I'll use a type of shorthand throughout the book to tell you which ribbon command to choose, giving the tab, group, and specific button. For example, if I say "Choose Review → Proofing → Thesaurus," it means to click the Review tab on the ribbon, look for the Proofing group of commands, and in that group, click Thesaurus. Some command sequences can be longer if a list or menu appears.

- **Dialog box launcher.** Some groups on the ribbon include a small button called a *dialog box launcher* in the lower-right corner. Clicking one of these buttons opens a dialog box with more detailed choices, such as the Font or Format Cells dialog box.

- **Mouse pointer.** When you're using the mouse in various apps, the mouse pointer changes shape often to cue you when it's in the correct position to perform a particular action. By default, when the mouse pointer is over the document in Word, the pointer resembles an I-beam with lines of text beside it, as shown in Figure 1.2. However, it may change to a white arrow, a two-headed arrow, and other shapes. The default mouse pointer in Excel is a bold white plus, but at other times it changes to a black plus, a split black arrow, and more. PowerPoint and Outlook use the white arrow and a plain I-beam as the main app pointers, but you may see other mouse pointers in those apps, too.
- **Status bar.** This area below the main work area displays status information and has tools for changing the zoom that I'll cover shortly.



## Note

The more recent Microsoft 365 app versions have made it easier to get help about a feature or task. Make sure your computer is connected to the Internet to receive the maximum results, and then press F1 or choose Help → Help → Help to open a Help pane at the right. Enter a command name, task, or other search keywords, and then press Enter to see matching results. You also can use Microsoft Search (Alt+Q) in the title bar to search for help.

## Changing views

The View tab on the ribbon enables you to change the view and turn some view features on and off. The default view for Word, Print Layout, was shown in Figure 1.2. The default view in Excel, PowerPoint, and Outlook is called Normal. Figure 1.3 shows the View tab in Excel as an example.



### 1.3 Use the View tab choices to adjust screen appearance.

Generally speaking, the View tab in each of the apps has a main group with the overall view choices, plus additional groups with other settings. Here's the name of the group with the overall view choices for each app, plus a briefing on the available views:

- **Views group in Word.** Word's default Print Layout view approximates how the document will look when printed in hard copy, showing margins, spacing between pages, headers and footers, and so on. It also includes Web Layout view so you can

see how the document would look when published as a web page. Outline view, which you will learn more about in Chapter 2, enables you to organize or reorganize a document. Draft view shows just the text, without any of the features in Print Layout view. Finally, Read Mode hides most of Word's screen features, so you can read a document more easily.

- **Workbook Views group in Excel.** In addition to the default Normal view, which is shown later in this chapter, Excel offers Page Break Preview view. Use it when you want to print and think you might need to adjust how the contents break between separate pages. The Page Layout view not only shows page breaks, but also shows how headers and footers will appear when printed.
- **Presentation Views group in PowerPoint.** Beyond the default Normal view, this group in the PowerPoint View tab has an Outline View choice, like Word. It also has a Slide Sorter view for rearranging the order of the slides, or pages, in the file. The Notes Page view enables you to see a speaker notes layout for presentation slides. As in Word, you can choose the Reading View to see the presentation without app tools getting in the way.
- **Current View group in Outlook.** Even though Outlook has a Normal view and a Reading view, this group doesn't offer those choices. Instead, you can choose Change View to adjust aspects of how messages are displayed, or View Settings to change details such as which columns of message information display.



### Note

The buttons near the right end of the status bar (refer to Figure 1.2) also enable you to change between views. In Outlook, these buttons are the only way to change between Normal View and Reading View.

You also can tinker with whether the ribbon is fully visible. The small up arrow button in the lower-right corner of the ribbon is called the Collapse the Ribbon button. You can click it or press Ctrl+F1 to hide everything but the ribbon tabs, allowing more of the file's contents to appear on-screen. When you need to choose a command, just click a tab to expand the ribbon temporarily, choose the desired button or item, and then continue working. The ribbon will collapse again on its own. To return the ribbon to its normal appearance and function, click a ribbon tab, and then click the Pin the Ribbon button—it has a pushpin on it—in the lower-right corner of the ribbon or press Ctrl+F1 again. You also can double-click a ribbon tab to collapse the ribbon or pin it back open.

The button in the lower-right corner of the Outlook ribbon looks like the Collapse the Ribbon button in the other apps, but its name is Switch Ribbons. Clicking the button toggles between a one-line Simplified Ribbon or the Classic Ribbon that looks like the ribbon in Word, Excel, and PowerPoint.

## Zooming

Today's trend of computers offering ever-higher screen resolutions has its pros and cons. While graphics and video look gorgeous in hi-res, screen features and content in business-oriented programs can look small and difficult to read. Whether you've forgotten your glasses or just have eyestrain from a full day of screen time, increasing the zoom or zooming in can make screen contents easier to read. On the other hand, decreasing the zoom or zooming out allows more of the file's contents to appear on-screen at once, which can be handy in some situations. For example, you might want to zoom out when working in Excel to show more rows and columns, which would make it easier to select a large set of data for a chart. Or, you might want to zoom in when performing design tasks in Word or PowerPoint, such as aligning graphic objects, and then zoom back out to see how your changes look in context with the rest of the contents.

The Zoom group of the View tab holds choices for changing the zoom. Word offers the most preset zoom choices, enabling you to zoom to One Page, Multiple Pages, or Page Width size. In Excel, you can select an area on the worksheet and then click the Zoom to Selection button in that group so the selection will fill the screen, usually by zooming in. PowerPoint has a Fit to Window choice that zooms the slide in or out as needed to fill the available space on-screen. To return to the normal zoom in Word and Excel, click the 100% button in the group. Clicking the Zoom button in Word, Excel, or PowerPoint opens the Zoom dialog box, which enables you to choose a preset zoom percentage or enter your own setting in the Percent text box (Word and PowerPoint) or Custom text box (Excel); click OK to apply your choice and close the dialog box. Outlook's View tab doesn't really have zoom settings per se, but you can choose the Use Tighter Spacing button in the Layout group to see more messages on-screen.

All four apps have the Zoom slider shown in Figure 1.2. Use it to change the zoom on the fly. You can drag the slider "thumb" to the left to zoom out or to the right to zoom in. Or, you can click the Zoom Out (-) or Zoom In (+) buttons at either end of the slider to zoom out or in at preset 10% increments. When you change the zoom using any method, the change applies to the current file only, and normally only to the current sheet in Excel.



**Genius**

A zoom setting of 120–125% strikes a good compromise between increasing the zoom enough to reduce eyestrain and allowing plenty of the work area to appear on-screen at once.

## Working with Files

Now that you've had an overview of how the Microsoft 365 apps tick, it's time to turn to the practical business of starting to work with files in Word, Excel, and PowerPoint. But what does the term *file* mean when it comes to the various apps, anyway? Generally speaking, you can refer to any Microsoft 365 file as a *document*. And in fact, Word files are called documents. However, an Excel file is called a *workbook*, with the name stemming from how Excel enables you to organize your data in an orderly fashion on separate *worksheets*. Because PowerPoint files are intended for a speaker to use while giving a presentation, PowerPoint files are called *presentations*, each holding individual *slides* of information.

When you click the File tab on the ribbon, a screen loaded primarily with choices for working with files appears. This screen is sometimes called Backstage or Backstage view. You can use the choices on the File tab to create, save, export, and print files, among other actions.

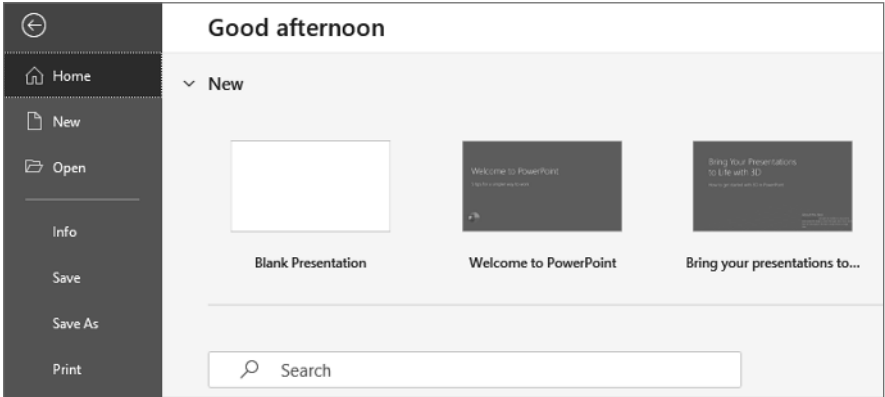


### Note

While Outlook has a File tab and you can save messages as files, using the app to create and manage email messages differs substantially from how you use the other three apps covered in this book. If you're eager to learn more about Outlook, skip ahead to Chapter 10.

## Creating a blank file

You learned at the start of the chapter that when you start Word, Excel, or PowerPoint, the app prompts you to open or create a file. You can click the Blank Document, Blank Workbook, or Blank Presentation thumbnail to create a new blank file at that point. If you've already started the app and opened a file (blank or otherwise), you can click the File tab and then choose Blank Document, Blank Workbook, or Blank Presentation (Figure 1.4) to create another blank file. But for my money, it's fastest to press Ctrl+N to create a new file. No matter the method, the app assigns a placeholder name to each blank file you create until you save it under a new name. The placeholder names reflect the app's file type, so Word assigns Document1, Document 2, and so on; Excel assigns Book1, Book2, and so on; and PowerPoint assigns Presentation1, Presentation2, and so on.



**1.4** Click the File tab and then choose Blank Document, Blank Workbook, or Blank Presentation to create a new blank file.



**Caution**

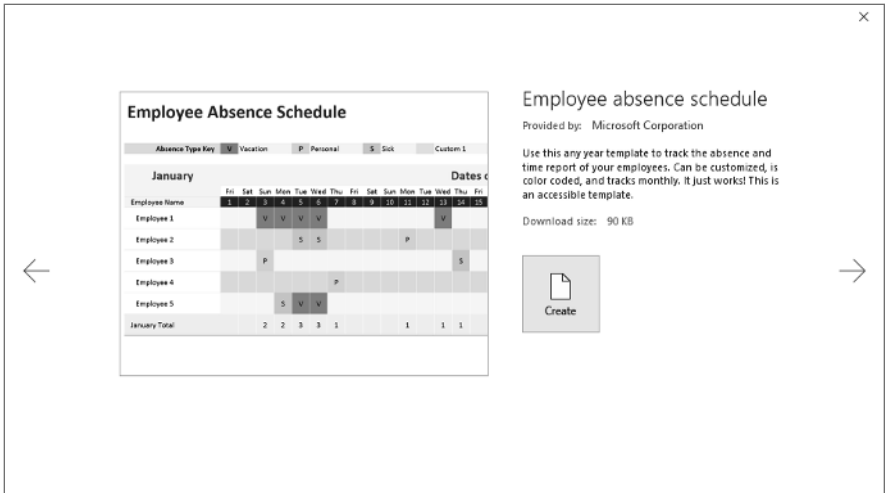
If you work in Word, Excel, or PowerPoint for the web, the cloud-based versions of the apps, you might have gotten very comfortable with how the cloud apps automatically save the file for you as you work. Unfortunately, the desktop versions of the apps aren't as helpful, so you should make sure you save your work frequently. See the later section called "Saving and Closing a File" to learn how to save.

## Exploring templates

If starting from a blank slate sounds like too much work, if you're looking for design or content ideas, or if you're fairly certain someone else has already created just the type of file you're looking for, then you might find what you need in the huge selection of templates offered through the apps. A template is simply a pre-made file that typically includes section or slide titles and labels, placeholder content or prompts, formulas, and formatting. When you use a template file, which has a slightly different file format than a regular file, it creates a new file with the same contents as the template. You fill it out with your own content from there and save the copied file. Thousands of business and personal templates are available for download, including resumes, flyers, brochures, planners, calendars, budgets, invoices, inventory lists, sales pitches, and financial or scientific results presentations. PowerPoint also enables you to download a new presentation theme and create a file from it. "Understanding Themes" in Chapter 6 covers themes in more detail.

To find and download a template after starting an app, follow these steps:

1. **Choose File → New.** The options for creating a new file appear. To display only themes and not templates in PowerPoint, you also need to click Themes under the Search for Online Templates and Themes text box.
2. **Scroll down to see thumbnails for suggested templates.**
3. **Click a template thumbnail to select it.** As shown in Figure 1.5, a larger preview of the template appears, along with a description and the download size information.



1.5 You get to preview a template before downloading it.

4. **If the template looks like what you want, click the Create button.** The template downloads to your computer, and a new file based on the template opens in the app. You can then add your own content and save the copy of the template file.

If you didn't see a template that looked promising in Step 2, you can scroll back up and click one of the Suggested Searches choices under the Search for Online Templates text box (called Search for Online Templates and Themes in PowerPoint). Or, you could click in that text box, type a search term or brief description, and press Enter. The screen displays thumbnails for matching templates in the search results. At that point, continue with Step 3 to select and download a template.



**Caution**

The templates you download through the Microsoft 365 apps are from a trusted source, so they should be free from viruses. If you obtain a template from another source, make sure to check it for viruses and other malware.

Each app automatically stores each template you download into a subfolder of your Windows 10 user folder so that you can reuse it. The next time you choose File → New, downloaded templates will appear at the top of the screen to the right of the Blank Document, Blank Workbook, or Blank Presentation thumbnail. If you've downloaded numerous templates, you may have to click an arrow button to scroll right to find the one that you'd like to reuse. To remove a template from the choices at the top of the screen, right-click it and choose Remove from List.

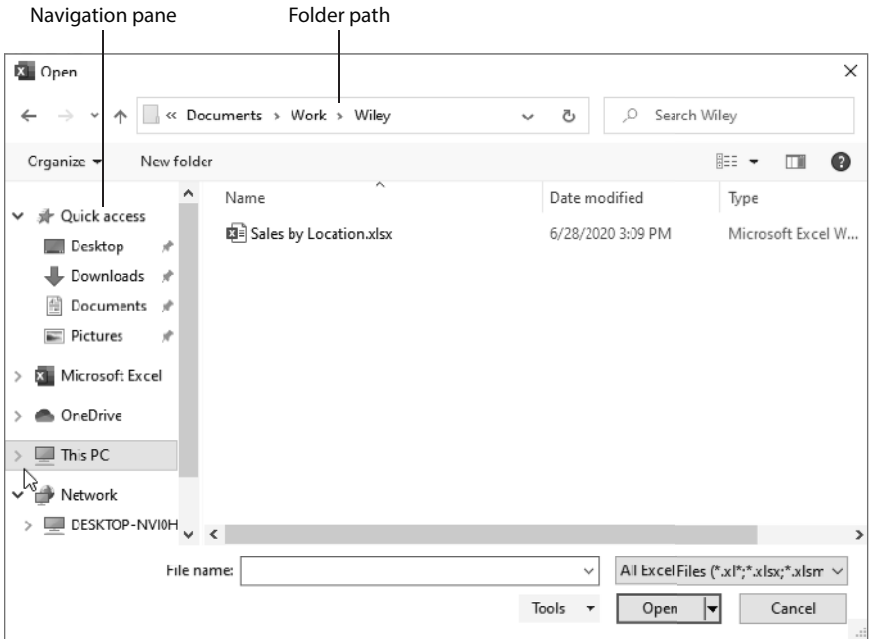
## Opening an existing file

When you start one of the Microsoft 365 apps or click the File tab, the initial screen that appears includes a Recent list, which includes previously saved files you've worked on during the not-too-distant past. Click a file in that list to open it immediately.

If the file to open is not on the Recent list, click the Open choice at the left (below New). Toward the middle of the screen, a list of locations appears. Depending on the type of Microsoft 365 subscription you have, there might be OneDrive and Sites locations for cloud-based storage. You can choose a location like that to look for files.

Lower, under Other Locations, the This PC and Browse choices appear. If you click This PC, the list at the right changes to show the files in the same folder as the currently opened file (if any). You can use the up arrow button to the left of the folder breadcrumb trail at the top to navigate a bit and display different files.

I prefer to click Browse and use the good old Open dialog box (Figure 1.6) to navigate to the location holding a file and open it. As shown in Figure 1.6, when you move the mouse pointer over the Navigation pane at the left, arrows appear to the left of the listed locations so that you can expand and collapse the listing. Clicking the right arrow beside This PC would show all the storage locations under This PC, including available disk drives on your computer. Double-click an item in the Navigation pane to show its contents in the file list at the middle of the dialog box. If you need to open a folder from the file list, double-click it. The Address box at the top of the dialog box shows the path to the current folder. When the file you want to open appears in the file list, either double-click it or click it and click the Open button.



**1.6** Use the Open dialog box to locate and open an existing file.



### Genius

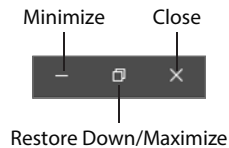
Glitches happen. Your laptop might lose power and shut down before you save your file, or the system might restart on you after a Windows update installed in the background. To try to recover an unsaved file in an app, choose File → Open. Below the list of files at the right, click the Recover Unsaved Documents, Recover Unsaved Workbooks, or Recover Unsaved Presentations button. The Open dialog box that appears lists any unsaved files. Click the file to reopen it, and then click the Open button.

## Switching to another file

You may encounter situations where you need to be working with two or more files at once. With multiple files open, you can use the View tab shown in Figure 1.3 to switch to another file in the same app. On the View tab, click the Switch Windows button in the Window group, and then click the name of the file. If you like using the taskbar, you can move the mouse pointer over the app's button. When a thumbnail for each open file appears, click the desired thumbnail.

To use the keyboard to display another file, press and hold the Alt key, briefly press the Tab key while still holding Alt, use the arrow keys to select the thumbnail for the file to display, and then release the Alt key. This is one of the methods you can use to switch between open files in different apps. Alternatively, you can move the mouse pointer over the other app's taskbar button, and then click the thumbnail for the desired file. If only one file is open in the other app, click its taskbar button.

Another method is not really "switching" files exactly. You can change the size and position of windows on-screen, such as when you might want to be able to see contents from two files at the same time. The Minimize and Restore Down/Maximize buttons sit to the left of the Close (X) button in the upper-right corner of each file window, as shown in Figure 1.7.



**1.7** You can also work with a window's size and position to facilitate working with multiple files.

Here's how those buttons work and come into play when working with multiple files:

- **Minimize.** Clicking this button collapses the file down to the app taskbar button, effectively switching you to the next open file.
- **Restore Down/Maximize.** A window is maximized when it fills the computer screen, and clicking this button on a maximized window reduces the window to a smaller (but still visible) size. The button changes from Restore Down to Maximize when the window is not maximized. When you need to see information in two separate files at the same time, click the Restore Down button for each window. To resize each window, move the mouse pointer over the window border so that it changes to a white double-headed arrow, and then drag until the window reaches the dimensions you want. Then drag each window by its title bar to position it on-screen as desired. Click the Maximize button to return a window to full screen size.



### Note

The Window group of the View tab offers additional choices for viewing and sizing file windows, such as Arrange All, which opens a dialog box with choices for arranging the open windows. You also can right-click the Windows taskbar and use some of its choices, such as Show Windows Side by Side, to arrange the open windows. Keep in mind, though, that the taskbar shortcut menu choices apply to open windows from all programs.

## Typing in a Word Document

Whether you are a two-finger hunt-and-peck typist or a fluid touch typist, Word makes it fairly easy to create content in a document. If anything, many people overthink how to type in text and cling to outdated ways of doing things. For example, if you're old enough to have learned touch typing on a relic called a typewriter, like (yikes!) me, you may have learned to press the typewriter space bar twice between sentences and the carriage return twice between paragraphs. Modern proportional fonts (letter styles) and the inclusion of extra spacing between paragraphs in Word's default paragraph style have rendered those manual double spacing and lines obsolete. Additionally, many professional writing style guides also call for single spacing between sentences.

The upshot is, just start typing in the document. As you type, a blinking vertical line called the insertion point appears to indicate where the next typed character will appear. Press the Spacebar once between words and sentences. Press the Enter key once to start a new paragraph. When you type enough content to fill the current page, Word creates a new page for you automatically. Keep it simple for now.



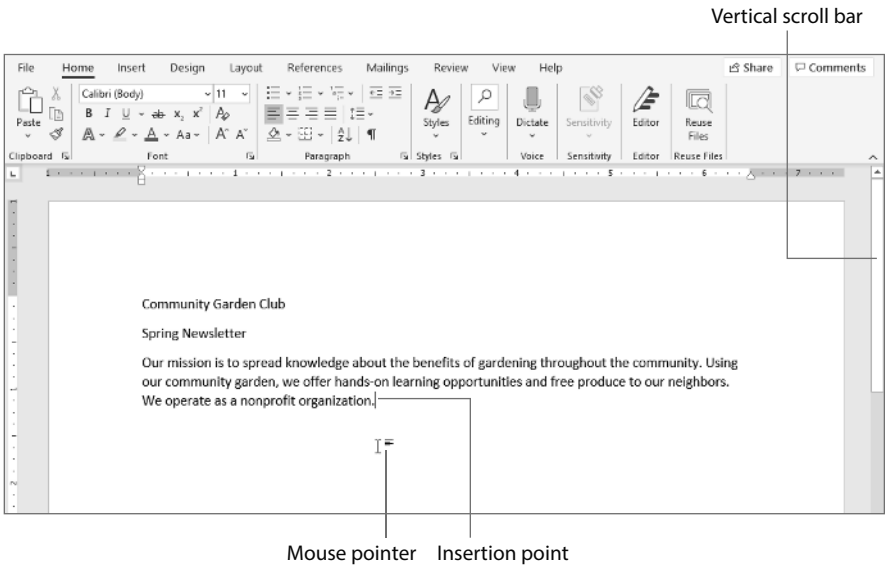
### Caution

Ongoing confusion surrounds the terms *insertion point*, *mouse pointer*, and *cursor*. Decades ago, before the invention of the mouse and similar input devices, *cursor* referred to a blinking box or line on-screen, similar to the insertion point described here. Windows settings use *cursor* for the blinking vertical line. However, in some instances, Microsoft (and other) online documentation calls the mouse pointer a *cursor*. For the record, I'm using *insertion point* for the blinking vertical line and *mouse pointer* or *pointer* for the mouse.

Figure 1.8 shows a basic document with some text in Word's Print Layout view. Even though it's not obvious, even a blank Word document uses a default template called Normal.dotm that defines some document basics like the page size, margins, and document styles. Text you type uses the default Normal style, which uses the Calibri font, 11 pt. size, 1.08 spacing between lines, and 8 pt. spacing after paragraphs. (Later chapters explain more about settings like these.) This is why you don't need to overthink while typing. The Normal.dotm template applies attractive and legible settings for you.

Beyond just typing, Word includes a feature called Click and Type that enables you to add text anywhere on a page. Move the mouse pointer over the blank area where you want to place the text. When lines of text appear with the I-beam mouse pointer, as shown in Figure 1.8, double-click to place the insertion point there, and then start typing. Be advised that using this method sometimes inserts a tab stop for the newly created paragraph. Once you have text in the document, you may need to move around by changing

the location of the insertion point. If the area where you want to place the insertion point is visible, just click that spot with the mouse. You also can use numerous other keyboard shortcuts to move around, changing the location of the insertion point. Table 1.1 lists the main ones that I use.



**1.8** Word's default formatting settings make attractive, legible text.

**Table 1.1** Word Keyboard Shortcuts

Key(s)	Description
Arrow keys	Moves the insertion point one character or line in the direction of the arrow.
Home and End	Moves the insertion point to the beginning or end of the line currently holding the insertion point.
PgUp and PgDn	Moves the insertion point up or down by one screenful.
Ctrl+Home and Ctrl+End	Moves the insertion point to the beginning or end of the document.
Ctrl+left arrow and Ctrl+right arrow	Moves the insertion point by one word in the direction of the arrow.
Ctrl+up arrow and Ctrl+down arrow	Moves the insertion point up or down by one paragraph. If the insertion point is within a paragraph, Ctrl+up arrow moves the insertion point to the beginning of the paragraph.



### Caution

If the PgUp and PgDn keys on your keyboard are integrated with a 10-key keypad, you must press the Num Lk (Number Lock) button to turn off having the keys enter numbers and activate the alternative functions of the keys. Press Num Lk again to return to number entry.

You also can use the vertical scroll bar to change the area of the document currently displayed on-screen. The vertical scroll bar at the right controls up and down movement. When the document uses a wide page format or a higher zoom, the horizontal scroll bar appears at the bottom for controlling left and right movement. Figure 1.8 shows the vertical scroll bar. Drag the scroll box in the scroll bar to move more quickly, or click an arrow at either end of the bar to move in smaller increments. Be sure to click to move the insertion point as needed after you scroll.

Chapter 2 explores content and document development in more detail. Note that you can use many of the same techniques you'll learn in Word to add content to the body of an Outlook message. Chapter 10 covers Outlook.



### Genius

If you're slow at typing, have painful hands, or create many or lengthy documents such as medical records or legal documents, try plugging a microphone into your computer and using Word's dictation feature. Choose Home → Voice → Dictate (main part of the button) to toggle dictation on and off. Click the arrow part of the button to change languages. Just be patient with the lag between saying the words and seeing them in the document.

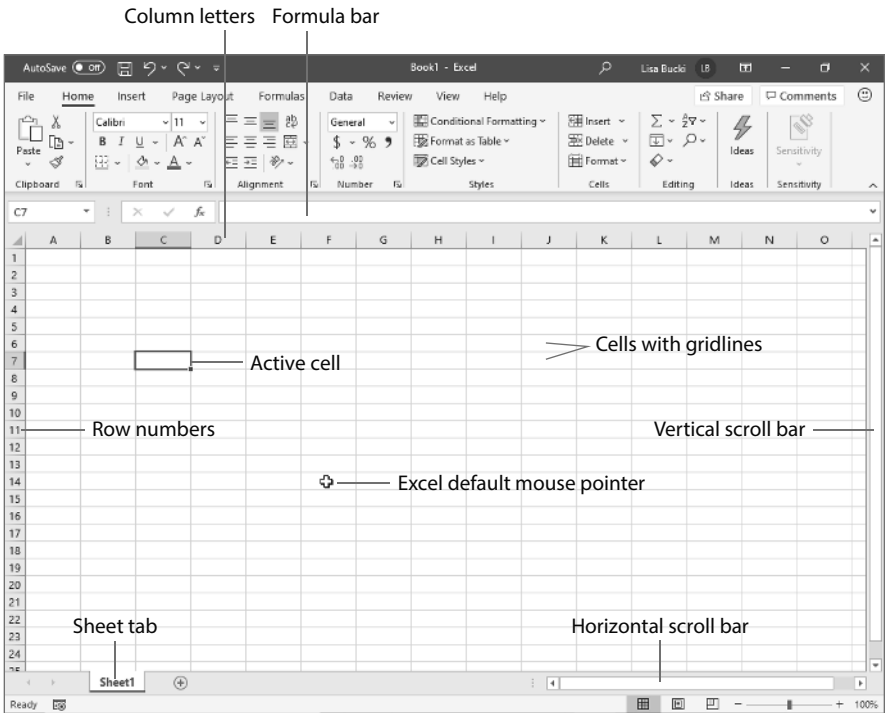
## Making Your First Cell Entries in Excel

As you just learned, when you're writing a document in Word, you can get away with just typing a lot and not knowing the nuances of how to get around. Excel is trickier than that. Some of the interface's features are important to being able to work accurately in the program, especially when it comes to creating formulas that calculate or organizing data effectively. This section covers a few unique Excel interface features that offer powerful shortcuts and introduces you to the nuances of making various types of cell entries in Excel.

### Exploring the Excel screen

At first glance, the Excel screen can look a bit busy with an extreme number of buttons and letters and numbers and boxes. Each worksheet or sheet in an Excel file has more

than 16,000 columns and 1,000,000 rows, for a total of more than 17 billion cells! That sounds overwhelming, so I'm going to zero in on the key screen features you need to know to work in Excel, which are shown in Figure 1.9. Later parts of the book will cover other features of the Excel interface in discussions about particular tasks and actions.



**1.9** These screen features facilitate your work in Excel.

Excel's mouse pointer is a large white plus by default, as shown in Figure 1.9. Here are other unique features you'll use when working in Excel:

- **Formula bar.** You will use this area to enter and edit cell contents. The Formula bar also displays the contents of the active cell. Or, if the active cell contains a formula, the formula appears in the Formula bar, while the formula result appears in the cell itself.
- **Row numbers and column letters.** The working area in Excel is organized into rows and columns of cells. The column letters across the top of the grid and the row numbers down the left side identify the address or location of a cell or range. The bands with the letters and numbers are also called *row and column headers*.

- **Cells and gridlines.** A *cell* is formed by the intersection of a single worksheet row and column. The column letter and row number combined identify the *cell address*, also called the *cell reference*. For example, the address for the cell in column C of row 7 is C7. Knowing the cell address comes in handy when you need to jump to a particular piece of information in a worksheet, as well as when you are building formulas. Gridlines identify the cell boundaries.
- **Active cell.** A bold outline, sometimes called the *cell selector*, identifies the active or currently selected cell. When more than one cell is selected, the bold box surrounds the entire selection.
- **Sheet tab.** A tab appears for each worksheet in the file.

The Show group of Excel's View tab has Formula Bar, Gridlines, and Headings check boxes that you can use to toggle those screen features on and off. (*Headings* is another name for row and column headers.) When you want to finalize a workbook file and discourage other people from making edits, you might click the Formula Bar check box to uncheck it, thus hiding the Formula bar. It's common to turn off the gridlines and headings displays for some types of worksheets, such as an executive dashboard that shows summary information and a few charts. In particular, hiding the gridlines makes some sheets more legible and attractive. Keep in mind that these settings in the Show group of the View tab control only the on-screen display of gridlines and headers. If you want to control whether gridlines and headers print, you'll have to adjust the page setup, which is covered in Chapter 11.

## Moving around the sheet

Excel holds a few surprises for you when you're moving around and making different types of cell entries. I'll highlight the shortcuts and the pitfalls for you. When you move around the worksheet, you change the cell that's the active cell. Any entry that you make will then appear in the active cell, which is why I'm covering moving around as a prelude to making cell entries. The most obvious way to move around a worksheet is to press the down, up, left, and right arrow keys, moving the cell selector one cell in the arrow direction. Or, you can click a cell that appears on-screen to make it active immediately.



**Genius**

If you know the address for a cell that doesn't currently appear on-screen that you want to select, press Ctrl+G or F5, or choose Home → Editing → Find & Select → Go To. In the Reference text box of the Go To dialog box, type the cell address, and then click OK. Boom, cell selected! In Word, launch Go To using Home → Editing → Find → Go To, Ctrl+G, or F5. In an Outlook message, press F5. PowerPoint does not have Go To.

You also can use the vertical and horizontal scroll bars (refer to Figure 1.9) to change the area of the worksheet currently displayed on-screen, as for a Word document. But—this is important—moving with the scroll bars does not change the active cell. So after you use a scroll bar, be sure to click the cell you need to select.

My other favorite keyboard shortcuts for moving around in Excel include the PgUp and PgDn keys, which move the active cell up or down by one screenful of rows. (Keep in mind that the number of rows may vary depending on your zoom setting and row heights in the sheet.) I also like Ctrl+End, which selects the cell at the bottom-right corner of the range that holds data on the sheet, and Ctrl+Home, which jumps back to cell A1.

## Adding text and values

Once you've selected a cell, you can type in various types of information. This section covers the most basic types of entries, while Chapter 4 will cover how to enter and create formulas. After you type an entry in a cell, to finish the entry and select the next cell, press Enter if you want to move down the column or press Tab if you want to move across the row. Keep these notes about the different types of entries in mind as you begin to populate a worksheet with data:

- **Text.** Also called labels, text entries can serve as items in a list of data, column or row headings and other types of identifiers, or notes or instructions on the sheet. Excel considers any alphanumeric entry that begins with a letter to be text. Text entries can include entries that begin with a number, such as 10 Handbags or A123. By default, text entries align to the left in the cell.
- **Values.** These are the numeric entries you make in a sheet and are typically the values used to perform calculations. By default, value entries align to the right in the cell. If you have an instance where you need for Excel to store a numeric entry as text, type a ' (single quote) at the start of the entry.
- **Hyperlinks.** If you type a website address or email address into a cell, Excel automatically converts it to a hyperlink. (The same thing happens in Word, PowerPoint, and Outlook messages.) You can click the hyperlink in a cell (when you see the hand mouse pointer over the hyperlink) to open the linked web page or create a new email message to a contact. You have to click and hold on the cell to select the cell itself. Note that you also can insert other types of hyperlinks, such as a link to a contract or other relevant resource document, by pressing Ctrl+K or choosing Insert → Links → Link (choose the top part of the Link button) and then using the Insert Hyperlink dialog box to select the file to link.

Figure 1.10 shows examples of text, value, and hyperlink entries in a sheet. Any entry that is too long to fit in its cell automatically spills over into the next cell to the right, like the

email address entered in cell B2. Chapter 3, “How Do I Make Changes In Excel?,” will present a few techniques for addressing how entries fit in cells, such as increasing the column width. Excel also provides shortcuts for entering series of information. See “Using Auto Fill and Filling Series” in Chapter 3 to learn more.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F
1	Order Summary					
2	Operator: name@example.com					
3						
4	Order #	Date	Customer	Total	Disc. %	
5		1	Ryan			
6		2	Miller			
7		3	Smith			
8		4	Acton			
9		5	Ryan			
10		6	Casper			
11		7	Smith			
12		8	Phillips			
13		9	Yelton			
14		10	Miller			
15						

**1.10** You can make basic entries like these in sheet cells.



**Genius**

Despite that little inconvenience of sometimes having to toggle Num Lk on and off, I love having a 10-key keypad on my laptop or keyboard to speed up numeric data entry in Excel. It's much easier to use the compact keypad layout than to stretch for the number keys near the top of the keyboard, especially if you've had any 10-key typing training. If you're a heavy Excel user looking to up your data entry game, check out some online 10-key tutorials.

## Adding dates and times

Excel treats dates and times differently than other types of entries. It converts each date or time entry into a date serial number behind the scenes, even though the date and time continues to display as usual in the cell. Because it stores dates as serial numbers, you can create formulas to do date-related actions, such as finding out how many days fall between a start date and an end date. As a practical matter, you don't have to worry about the serial number. All you have to do is type the date, time, or a combination of the two in a format that Excel recognizes and then press Enter or Tab. Figure 1.11 shows examples of acceptable date and time entries. Don't forget to include AM or PM when you're typing a

time according to the regular 12-hour clock. In some cases, Excel automatically changes the width of the column when you make one or more date entries.

	A	B	C	D
1				
2		June 30, 2023		
3		6/30/2023		
4		Jun-23		
5		2023-06-30		
6		6/30/23 1:00 PM		
7		1:30 PM		
8				
9				

**1.11** Excel recognizes dates and times typed using these and other formats.

If you use a format that Excel does not recognize as a date or time, Excel will either display an error or treat the entry as text (left aligned) rather than a date (right aligned). In other cases, Excel might recognize a date or time you enter but convert it to another format when you finish the entry, based on location settings for dates and times in Excel and other default date settings in the Windows operating system. Don't worry, though. Chapter 6 explains how to change the number formatting manually for dates and other numbers in the section called "Changing the Number or Date Format in Excel."

## Number formatting on the fly

You've just seen how Excel can interpret date entries in cells and adjust the formatting. Similarly, Excel can recognize certain types of number formatting depending on what other characters you include with the number. Knowing how this "on the fly" formatting works can save you some typing time, as in these cases:

- **Decimals.** If you type a . (decimal point) when entering a number followed by additional numbers, that sets the number of decimal places displayed in the cell. So, if you type 11.1234, Excel displays the entry with all four decimal places. However, if the last number entered after the decimal place is a 0 (zero), Excel truncates that digit. That is, 11.1230 would be displayed as 11.123.
- **Thousands (and beyond).** By default, if you type 1000 in a cell, Excel displays it as 1000. But if you include the thousands separator and enter 1,000, Excel displays it as 1,000. If you enter 1,000,000, Excel displays 1,000,000. You get the drift.

- **Currency.** You can type a currency symbol such as the \$ (dollar sign) or € (Euro symbol) at the beginning of an entry, and Excel will recognize it as currency. Include a decimal point and two decimal places, and comma separators if needed, as well.
- **Percentages.** Now, this is where things get a little trickier because of how percentages work in math. A percentage is part of the whole. In math, the “whole” value is 1.00 or 100%. So .25 is 25%, .75 is 75%, and so on. Years ago in Excel, you had to enter the decimal value (such as .25) in the cell and then apply a number format to change it to a percentage. Now, you can just include the % (percent sign) when you type the value in the cell, and Excel automatically interprets it as a percentage. However, in formulas referencing the cell holding the percentage, Excel uses the corresponding decimal value to make the calculation.

Figure 1.12 shows some dates entered in column B, some values with two decimal places included in column D, and some discount amounts entered with the % (percent sign) in column E.

	A	B	C	D	E	F
1	Order Summary					
2	Operator: name@example.com					
3						
4	Order #	Date	Customer	Total	Disc. %	
5	1	6/20/2023	Ryan	99.99	15%	
6	2	6/20/2023	Miller	129.99	10%	
7	3	6/24/2023	Smith	80.95	10%	
8	4	6/28/2023	Acton	65.25	5%	
9	5	6/29/2023	Ryan	349.58	15%	
10	6	6/29/2023	Casper	79.99	5%	
11	7	6/30/2023	Smith	58.75	10%	
12	8	6/30/2023	Phillips	275.89	5%	
13	9	6/30/2023	Yelton	105.75	5%	
14	10	7/1/2023	Miller	79.99	10%	
15						

**1.12** The way you type some number entries helps Excel apply a number format automatically.

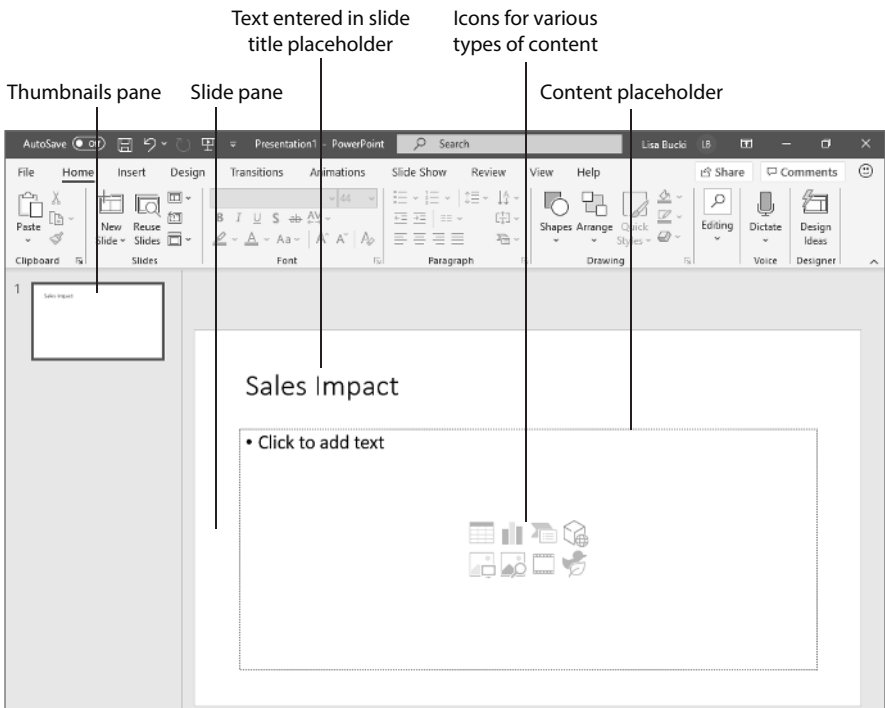


### Caution

When a number format has been applied to a cell, even by typing as just described, the cell keeps that number format even if you later delete the cell contents. This may lead to unexpected results if you need to type a number that needs a different format later, so you'd need to clear the cell formatting or apply another number format as described in Chapter 6.

# Adding Slide Content in PowerPoint

PowerPoint uses a third arrangement or method to add and organize content in each page or slide in a presentation. Each slide uses a *slide layout* that establishes where the main slide contents appear through predefined *placeholders*. Some placeholders just prompt you to enter text, while content placeholders enable you to add either a bulleted list of text or an object such as a table, chart, picture graphic, and more to the slide. Another type of content placeholder limits you to inserting a picture. Figure 1.13 shows a slide that uses the Title and Content slide layout. I've added a title into the title placeholder, while the content placeholder shows the icons that can be used to add one type of object to the slide.



**1.13** Add content to placeholders in PowerPoint.

To add text in a title or other text placeholder, click in the placeholder and type, and then click outside the placeholder. To type a bulleted list in a content placeholder, click in the placeholder, type bullet text, and press Enter to add the next bullet. Press Tab and Shift+Tab to change the bullet levels. Once you've added all the needed bullets, click outside the placeholder to finish.

Once you add more than one slide to a presentation, you can use the PgDn and PgUp keys to move between slides. In the default Normal view, you can move between slides by clicking the thumbnail for the desired slide in the Thumbnails pane at the left. (Some other views also enable you to navigate between slides by clicking thumbnails.)

Chapter 5 provides the detailed discussion of adding slides, using slide layouts, and adding various types of content in a content placeholder.

# Making and Working with Selections

You've already seen how to move around in the different types of files so that you can add content or make small changes. For other operations, such as when you want to copy or move data or work with data formatting and layout, you will usually need to make larger selections, and you have your choice of using the mouse, the keyboard, or a combination of the two. Let's run through how to do that next.

## Selecting content in Word

As usual, making selections is easiest in Word, OK, and Outlook messages, too. To make a selection of any set of content, just drag diagonally over it with the mouse. When you release the mouse button, selection highlighting identifies the selection. You also can click to place the insertion point at the beginning of the text to select, and then Shift+click the end of the area to select. Double-clicking a word selects it, Ctrl+clicking a sentence selects it, and triple-clicking selects the whole paragraph.



### Caution

This brings up one of my biggest tech writing pet peeves. Some tech content uses the term "click and drag" rather than just drag. By definition "click" means to press and release the mouse button, while "drag" means to press and hold the mouse button while moving the mouse, so a "click and drag" action isn't really possible. To make selections, just drag, please.

If you move the mouse pointer in the margin area to the left of the text, the mouse pointer changes to a white arrow that tilts to the right. When this arrow appears, clicking it once

selects the line of text that's to the right beside it. Double-clicking selects the paragraph that's to the right. Triple-clicking selects the whole document.

The keyboard shortcut Ctrl+A also selects the entire document. You also can press and hold the Shift key plus any of the arrow keys to start and expand a selection in the direction of the arrow. To use the mouse and keyboard together, click or use an arrow key to move the insertion point to the beginning of the selection, then Shift+click the end of the selection. You also can select a noncontiguous selection. This is a selection that basically includes two or more selected areas with space in between them, meaning they are nonadjacent. Select the first area using any technique; then press and hold the Ctrl key while dragging to select additional areas as needed.

Click in the document away from a selection to deselect it.

## Selecting content in Excel

Any selection you make beyond a single cell in Excel is considered a range. A *range* encompasses a rectangular group of cells, such as multiple cells holding sales data down a column or across a row. A range also can include multiple columns or rows of information. The *address* or *reference* for a range includes the address for its upper-left cell, a : (colon), and the address for its lower-right cell, as in F10:H25. If you refer to Figure 1.12, the range D5:D14 holds the Total amount for each order. The range A7:E7 holds the information for Order 3. And the range A4:E14 holds all the order information, including the labels or headers identifying each column of data.

### Selecting a range

Most users prefer to use a mouse to make selections in Excel. Just drag diagonally over the range to select it. The bold selection border or cell selector expands accordingly, and shading appears over all the cells within the border. Alternatively, you can click the upper-left cell and then Shift+click the lower-right cell. Figure 1.14 shows an example, with the range of order numbers and dates in cells A5:B14 selected.

If you're out in the field with your laptop, you may not have a mouse with you and may be stuck using the trackpad. I admit it, when it comes to making Excel range selections, I'm pretty trackpad incompetent, so I tend to switch to using keyboard shortcuts to make range selections. Using the keyboard is also more efficient when the range you need to select is wider or taller than the area that can show on-screen at once. Just select the upper-left cell for the range using the method of your choice, and then press and hold the Shift key while using the right and down arrow keys to expand the selection as needed.

	A	B	C	D	E	F
1	Order Summary					
2	Operator: name@example.com					
3						
4	Order #	Date	Customer	Total	Disc. %	
5	1	6/20/2023	Ryan	99.99	15%	
6	2	6/20/2023	Miller	129.99	10%	
7	3	6/24/2023	Smith	80.95	10%	
8	4	6/28/2023	Acton	65.25	5%	
9	5	6/29/2023	Ryan	349.58	15%	
10	6	6/29/2023	Casper	79.99	5%	
11	7	6/30/2023	Smith	58.75	10%	
12	8	6/30/2023	Phillips	275.89	5%	
13	9	6/30/2023	Yelton	105.75	5%	
14	10	7/1/2023	Miller	79.99	10%	
15						

**1.14** Range A5:B14 is selected.

If you know the range address for the range you want to select, click in the Name box, type the range address, and press Enter. For example, you could type **B2:C7** in the Name box and press Enter to select the range B2:C7.

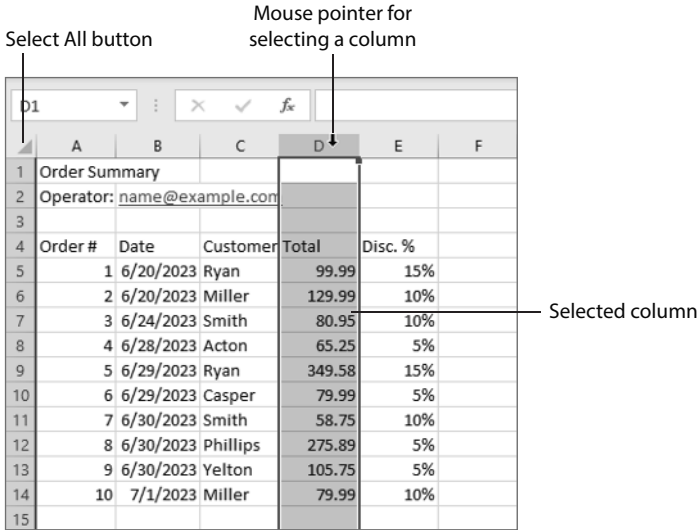
As in Word, you can select a noncontiguous selection. Select the first range as needed, and then press and hold the Ctrl key while dragging over an additional range or ranges to add with the mouse.

To deselect a range (including a selected row or column), click any cell on the sheet.

## Selecting a row or column

You might select an entire row that contains column labels to apply identical font formatting to all the cells, or you might select an entire column when you want to adjust the column width or fill with a different background color. You also can select multiple rows or columns when needed. To select one or more rows or columns, follow these steps:

- 1. Move the mouse pointer over the row or column header for the (first) row or column to select, until the mouse pointer changes to a black right arrow or down arrow.** (See Figure 1.15.)



1.15 You can select one or more rows or columns.

**2. Perform one of the following actions:**

- **Click the header for the row or column to select it.**
- **Drag down to select multiple rows or right to select multiple columns.**



If you want to select all cells in a worksheet, such as to adjust the formatting for all the cells, click the Select All button. It's in the upper-left corner of the sheet where the row and column headers intersect and has a triangle on it that points to the sheet cells (see Figure 1.15). You also can press Ctrl+A to select all the cells. Depending on the sheet contents, sometimes you need to press Ctrl+A twice to select absolutely every cell.

## Selecting content in PowerPoint

PowerPoint in some ways is the trickiest app when it comes to making selections, because the slide placeholders add another selection “layer” to navigate. The first layer, clicking the box around the slide placeholder, selects the placeholder itself. This enables you to perform actions that apply to the placeholder itself, including adding a fill color or design style and, in some cases, changing the font for all the text in the placeholder.

The second layer of selection in PowerPoint means selecting the placeholder content itself. For example, if you click within the text in a placeholder, you can use the same selection

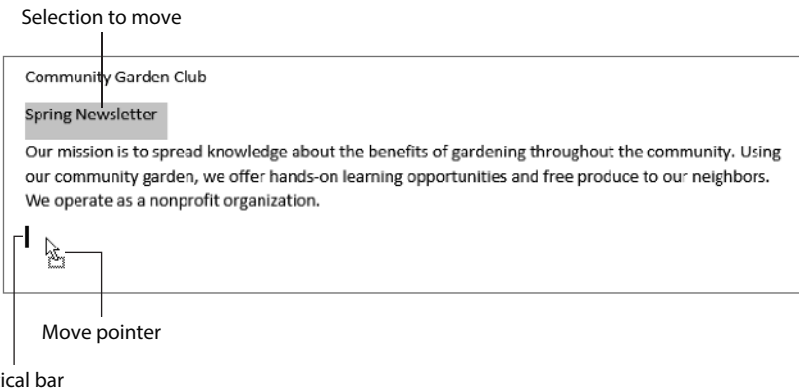
techniques covered earlier for Word to select all or part of the placeholder text to make changes such as formatting and edits. For other types of placeholder content, you might select the placeholder and then click an individual item, such as the legend in a chart.

Click a blank or empty area of the slide to deselect the placeholder and/or its contents.

## Copying or moving a selection

The ability to copy or move existing content in an app means you don't have to retype and reformat new content. As easily as you can pick up and move a pen on your desk, you can copy or move a selection from one spot to another in an app, or even between apps in many instances. The method you use to make the copy or move depends somewhat on location.

If you just need to copy the information or move it on the current page, sheet, slide placeholder, or email message within an area that's visible on-screen, drag-and-drop editing with the mouse works well. In Word, PowerPoint, or Outlook, select the text to move on a page or in the placeholder or message window. Point to the selection with the mouse, drag it to the desired new location, and then release the mouse button to drop it into place. As you drag, the mouse pointer changes to include a rectangle, as shown in Figure 1.16, and a black vertical bar appears to show the destination spot for the moved material. In Excel, select the cell or range to move, and then point to the selection border so that the mouse pointer changes to include a black four-headed arrow. To move the selected cell or range, just drag it to the new location. To copy the selection or range, press and hold the Ctrl key while dragging so that the mouse pointer changes again to include a small plus sign, and then drag until the copy of the selection or range reaches the destination you want.



**1.16** Using the mouse works well when copying or moving a selection within the visible area.

Moving or copying with the mouse becomes impractical for distances beyond the current Word or Excel screen, because Word tends to hang up and not scroll when you try to drag down to another page and Excel tends to scroll too quickly or sometimes jump by a full screen at a time. PowerPoint doesn't let you use the mouse at all to move or copy material between slides. And using the mouse to copy between Excel sheets or different app files is an obvious no-go unless you want to spend a lot of time resizing and positioning windows. In these scenarios, you should use the Copy, Cut, and Paste commands, as explained in these steps:

- 1. Select the content to copy or move.**
- 2. Choose Home → Clipboard → Copy to copy the selection or Home → Clipboard → Cut to move the selection.** You use the Cut command when moving the selection because you want to remove it from its original location.
- 3. Navigate to the new location for the copied or cut information, whether elsewhere in the file, on another Excel sheet or PowerPoint slide, or in another file.**
- 4. Click to position the insertion point in the document page or slide placeholder, or click the upper-left cell in the range where you want to place the copied or cut selection.**
- 5. Choose Home → Clipboard → Paste.** Be sure to click the top or main part of the Paste button. The copied or cut selection appears in the new location.



### Caution

When you paste in a workbook file, Excel will replace existing contents in the destination location. Make sure that when you click a cell in Step 4, there's a range of empty cells below and to the right that's big enough to hold the selection you made in Step 1. In the other apps, content is replaced only if you select the content before pasting.

Purists maintain that using a mouse to choose commands slows you down because you have to take your hand off the keyboard. In case you subscribe to that opinion, as I tend to because I type a lot, the keyboard shortcuts for the Copy, Cut, and Paste commands are Ctrl+C, Ctrl+X, and Ctrl+V. These three keyboard shortcuts work in Windows and most Windows programs.



**Genius**

The Clipboard is a memory holding area that Windows uses when you copy or paste information. Microsoft 365 has an expanded Clipboard that holds up to 24 items that you've copied during your current work session. Click the dialog box launcher in the Clipboard group of the Home tab to open the Clipboard pane, and then double-click a copied item to insert it at or near the insertion point, at the active sheet cell, or in a placeholder, as applicable.

## Using Undo and Redo

As you begin to make changes in your files, you may have the occasional "Darn! I didn't mean to do that" moment. Lucky for you, the apps have Undo. When you've made a change that you decide you don't want, click the Undo button (with the left-swooping arrow) on the QAT or press Ctrl+Z. After you've undone at least one action, the button for Undo's pal Redo also becomes active on the QAT. You can click it or press Ctrl+Y to redo the change that you just undid.

Undo tracks all actions you take during the current work session, which can be dozens. If you want to backtrack and undo numerous actions, click the Undo button's drop-down list arrow, move the mouse pointer over the oldest action to undo, and then click the action. This undoes that action as well as all the others above it in the undo history. The Redo button's drop-down list works the same when you want to redo multiple actions that you've undone.

## Refining Your Content

We all make typing mistakes, and some of us routinely mistype the same word over and over, almost like an unfixable glitch in the brain's typing circuitry. And there are some of us who just have more training in grammar and punctuation than others. Microsoft 365 offers many tools to help you clean up content glitches so that your documents reflect well on you.



**Note**

In addition to the tools described in this section, the Review tab in Word, Excel, PowerPoint, and an Outlook message window include other choices for refining your text, such as using the Thesaurus to choose another word or translation capabilities.

## Spell checking your work

You may have noticed that in Word, PowerPoint, and an Outlook email message body, wavy red underlines sometimes appear under words. This means that the word doesn't appear in the dictionary and is likely misspelled. In such a case, you can right-click a word with a wavy underline and choose a suggested correction from the menu that appears. Word also flags possible grammar errors with double-blue underlines, which you can right-click and then choose a suggested fix.

In Excel, you have to check spelling manually. It's a great practice to run a manual spell check in PowerPoint or an Outlook message, too, just to enhance the professionalism of your communications. Follow these steps to run a spelling check in one of those three apps:

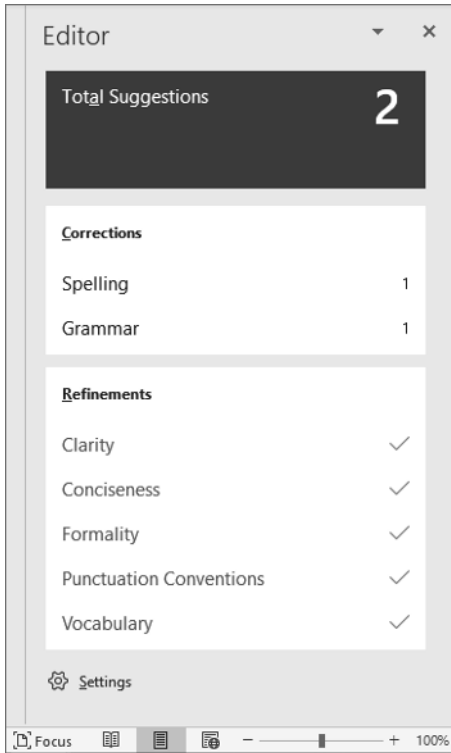
- 1. Select a single cell or a range of cells to check in Excel, or specific text to check in PowerPoint or the Outlook message.** When you select a single cell in Excel, the spelling check feature checks the whole sheet. If you don't make a selection in the other two apps, the spelling check feature checks the entire contents of the file or message. Otherwise, the spelling check reviews only the selected content.
- 2. Choose Review → Proofing → Spelling (Review → Proofing → Spelling & Grammar in Outlook) or press F7.** If an error is found, the Spelling dialog box opens in Excel. In Outlook, the dialog box is called Spelling and Grammar, and in PowerPoint, the Spelling pane opens at the right.
- 3. Click the desired fix in the Suggestions list and then click either Change or Change All.** You also can use other buttons to ignore the spelling, add the spelling to the dictionary, and more. Repeat changing and/or ignoring words that the spelling feature flags as needed.
- 4. If you see a message box asking whether to continue from the beginning of the file or message, click Yes.** If you made a selection in Step 1, you also may see a message asking if you want to check the rest of the document. Respond as desired.
- 5. Click OK in the message box telling you the spell check is complete, if it appears.**



### Caution

You might find that the AutoCorrect feature automatically “fixes” some entries that aren't typos. You can edit the entry to avoid unwanted corrections. Choose File → Options, click Proofing at the left side of the app's Options dialog box, and then click AutoCorrect Options to adjust these corrections. In Outlook, choose File → Options, click Mail at the left, click the Spelling and Autocorrect button, and then click AutoCorrect Options.

Word offers a completely new tool for reviewing document contents called the Editor. It suggests spelling and grammar corrections, as well as ways to improve factors such as text clarity and vocabulary. You can open the Editor pane by choosing Home → Editor → Editor, by choosing Review → Proofing → Editor, or by pressing F7. The Editor pane opens at the right, as shown in Figure 1.17.



**1.17** Word's Editor suggests corrections and refinements.

When a number appears to the right of one of the items listed under Corrections or Refinements rather than a green check mark, click the item in the pane to see and select specific suggestions. Click the right arrow (back) button at the upper left to return to the main Editor pane, and click the Close (X) button in the upper-right corner of the pane when you've finished using the Editor. If a message box saying that you've finished reviewing the Editor's suggestions appears, click OK.

## Using Find and Replace

You might need to change entries throughout a file, such as when you learn you've misspelled a product name. In a case like this, the Find and Replace feature is your friend. You've probably performed a find and replace operation in another word processing program, so here's a refresher of the basic steps to run through a find or replace in the Microsoft 365 apps:

1. **Press Ctrl+F to start a find and Ctrl+H to start a replace.** The ribbon commands for Find and Replace vary from app to app, so if you want to know them, here goes:
  - **Word.** Home → Editing → Replace, and then use either the Find or Replace tab. In Word, Ctrl+F and the Find command open the Navigation pane, which you can use to perform a find and then click matches to display and select.
  - **Excel.** Home → Editing → Find & Select → Find or Home → Editing → Find & Select → Replace.
  - **PowerPoint.** Home → Editing → Find or Home → Editing → Replace. PowerPoint uses a separate Find dialog box and a separate Replace dialog box.
  - **Outlook message.** Format Text → Editing → Find or Format Text → Editing → Replace.
2. **Enter the word, phrase, or value to find in the Find What text box, and if you're replacing it, enter the replacement information in the Replace With text box.**
3. **Use the Find Next or Replace buttons to review or replace entries one by one.**
4. **Click Close.**



**Genius**

Most dialog boxes are *modal*, meaning while the dialog box is on-screen, you can only work in the dialog box. The Find and Replace dialog box, in contrast, is *nonmodal* or *modeless*. This means that while the dialog box is open, you can click in the file and make changes, such as if you see a typo after clicking the Find Next button, and then click anywhere in the dialog box to return to using it.

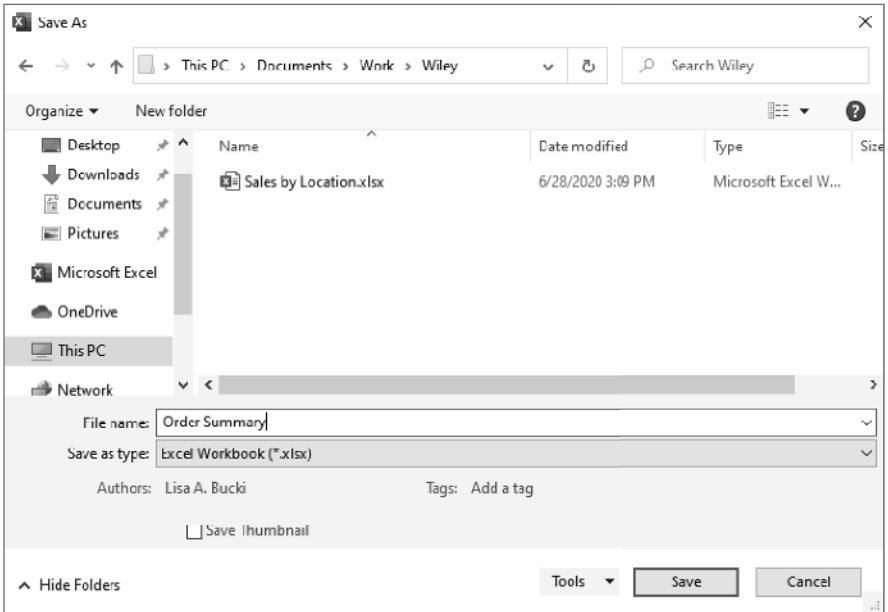
# Saving and Closing a File

You can save your file and give it a unique name any time after you create the blank file or create a new file from a template. This is your opportunity to establish an orderly system for naming files, just as you should use an orderly system for naming and organizing folders. After all, how are you going to find your work later if you can't navigate to the right folder and don't know what you named the file? For example, if you work with a variety of clients, you could create a folder for each client using File Explorer in Windows 10. Then each file for a particular client could start with a project number and include the client name and year and month, as in *0123 BestClient 2023-06*.

From there, saving a file will seem similar to the process of opening a file covered earlier in this chapter. Follow these steps:

- 1. Choose File → Save As.** (You also can choose File → Save the first time you save a file.) The Save As screen that appears again gives you the option of working with recently used folders or working with the other save locations. Again, I'm going to stick with the traditional method of using the Save As dialog box. Feel free to explore other methods the screen presents on your own. As noted earlier in the chapter, you can save an email message when selected either in the main Outlook screen or in an open message window. Starting the save opens the Save As dialog box immediately, so you can skip to Step 3.
- 2. Toward the middle, under Other Locations, click Browse.** Because the default save location is the Documents folder for your Windows 10 user account, the address that initially appears at the top of the Save As dialog box reads This PC > Documents >.
- 3. Use the Navigation pane and file list to navigate to the folder where you want to save the file.**
- 4. Edit the name in the File Name text box as desired.** Figure 1.18 shows the Save As dialog box.
- 5. Click Save.**

To resave a file as you periodically add data or make changes, choose File → Save, click the Save button on the QAT, or press Ctrl+S. After saving the file, you can choose File → Close to close the file without exiting the app, assuming you have finished working with the file.



**1.18** Files have generic numbered names until you rename them.

## Another Way to Save

When you save a new file for the first time, clicking the Save button on the QAT or pressing Ctrl+S works a bit differently than the File → Save or Save As command. A Save This File window opens. You can enter a name in the File Name text box and then choose a default or recently used location from the Choose a Location drop-down list. (For at least one of my Microsoft 365 accounts, the default location listed is OneDrive in this list.) After choosing a location, click the Save button. This can be a good way to save new files if you frequently save to the default location or one or two other folders.

