Microsoft®

Office 365®

Access™ 2019

COMPREHENSIVE

SERIES

(ex•ploring)

1. Investigating in a systematic way: examining
2. Searching into or ranging over for the purpose of discovery

QUALITY TESTED
PROCERT
★ EXCELLENCE IN EDUCATION AWARD ★
2018 BEST IN CLASS OFFICE

Series Editor **Mary Anne Poatsy**

Williams | Rutledge

Think Beyond the Point & Click

Exploring is Pearson's Office Application series that requires students like you to think "beyond the point and click." The goal of *Exploring* is, as it has always been, to go farther than teaching just the steps to accomplish a task—the series provides the theoretical foundation for you to understand when and why to apply a skill. As a result, you achieve a deeper understanding of each application and can apply this critical thinking beyond Office and the classroom.

Authentic Experience & Critical Thinking

Realistic and hi-fidelity **simulations** help you feel like you're working in the real Microsoft applications and allow you to explore, use 96% of Microsoft methods, and do so without penalty. With integrated learning aids and the Student Action Visualization playback of your work, you can practice, learn, and remediate for improved success.

Auto-graded Hands-On, Mid-Level, and Capstone Exercise **Grader Projects** in MyLab IT have you work live in Microsoft Office to complete the exercises in the book. With automatic feedback, detailed reporting, and even learning aids (eText, Video, Practice) built into reports for remediation, Graders allow you to efficiently learn in an authentic environment.

Critical Thinking modules pair Mid-Level Grader projects with a brief quiz that requires you to think about the project you just completed, interpret data, understand the implications of the results, and articulate them.

Student Resources

Access your student data files at www.pearsonhighered.com/exploring.

Find videos in MyLab IT:

Hands-On Exercise Videos—Screen capture videos following the action in the Hands-On Exercises (yellow pages) of the chapter, offering a complete walkthrough of the chapter content.

Soft Skills Videos—A video library that focuses on a variety of soft skills topics such as interview skills, accepting criticism and being coachable, resume tips, customer service, etc.

Earn digital badges and build an e-portfolio:

Critical Thinking quizzes and Application Capstone Badging Graders on which you score 90% or better generate a **MyLab IT badge,** which can be broadcast on LinkedIn and other social media sites to prove your skills to prospective employers. The application badges also qualify you for a discount on the MOS Certification exam.

MOS Objective Map, Additional MOS Material, MOS practice activities in MyLab IT provide a clear guide for you to get everything you can out of the series resources to prepare to pass the MOS Certification tests of your choice.

(ex·ploring)

SERIES

1. Investigating in a systematic way: examining. 2. Searching into or ranging over for the purpose of discovery.

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Dedications

For my husband, Ted, who unselfishly continues to take on more than his share to support me throughout the process; and for my children, Laura, Carolyn, and Teddy, whose encouragement and love have been inspiring.

Mary Anne Poatsy

I offer thanks to my family and colleagues who have supported me on this journey. I would like to dedicate the work I have performed toward this undertaking to my little grandson, Yonason Meir (known for now as Mei-Mei), who as his name suggests, is the illumination in my life.

Jerri Williams

To Zac: thank you so much for your hard work and dedication on this project. The long (late) hours you spent did not go unnoticed. I have very much enjoyed working with you and hope there's more to come. To my husband Dan, whose encouragement, patience, and love helped make this endeavor possible. Thank you for taking on the many additional tasks at home so that I could focus on writing. To Emma and Jane, I love you. You inspire me to reach for my goals and never settle for less.

Amy Rutledge

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Mary Anne is a senior faculty member at Montgomery County Community College, teaching various computer application and concepts courses in face-to-face and online environments. She holds a B.A. in Psychology and Education from Mount Holyoke College and an M.B.A. in Finance from Northwestern University's Kellogg Graduate School of Management.

Mary Anne has more than 20 years of educational experience. She has taught at Gwynedd Mercy College, Bucks County Community College, and Muhlenberg College. She also engages in corporate training. Before teaching, she was Vice President at Shearson Lehman in the Municipal Bond Investment Banking Department.

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Jerri Williams is a Senior Instructor at Montgomery County Community College in Pennsylvania, and currently works as a technical editor and content developer in addition to her teaching responsibilities. Jerri worked as a live and virtual corporate trainer and developer in major pharmaceutical and other companies for many years prior to joining the Exploring Access 2013, 2016, and 2019 teams. She is interested in travel, history, cooking, theater, movies, and tending to her colonial farmhouse (a work in progress). Jerri is married to Gareth and is the mother of two daughters, Holly (an accountant/office manager, and mother of an adorable son, Meir) and Gwyneth (a corporate defense/employment attorney). Jerri and Gareth live outside of Philadelphia, and enjoy their home and garden, spending time with family and friends, watching the Philadelphia Eagles, and visiting the Jersey Shore any time of the year.

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Amy Rutledge is a Special Instructor of Management Information Systems at Oakland University in Rochester, Michigan. She coordinates academic programs in Microsoft Office applications and introductory management information systems courses for the School of Business Administration. Before joining Oakland University as an instructor, Amy spent several years working for a music distribution company and automotive manufacturer in various corporate roles including IT project management. She holds a B.S. in Business Administration specializing in Management Information Systems, and a B.A. in French Modern Language and Literature. She holds an M.B.A from Oakland University. She resides in Michigan with her husband, Dan and daughters Emma and Jane.

Dr. Robert T. Grauer, Creator of the Exploring Series

Bob Grauer is an Associate Professor in the Department of Computer Information Systems at the University of Miami, where he is a multiple winner of the Outstanding Teaching Award in the School of Business, most recently in 2009. He has written numerous COBOL texts and is the vision behind the Exploring Office series, with more than three million books in print. His work has been translated into three foreign languages and is used in all aspects of higher education at both national and international levels. Bob Grauer has consulted for several major corporations including IBM and American Express. He received his Ph.D. in Operations Research in 1972 from the Polytechnic Institute of Brooklyn.

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The Exploring Series and You

Exploring is Pearson's Office Application series that requires students like you to think "beyond the point and click." In this edition, the *Exploring* experience has evolved to be even more in tune with the student of today. With an emphasis on Mac compatibility, critical thinking, and continual updates to stay in sync with the changing Microsoft Office 365, and by providing additional valuable assignments and resources, the *Exploring* series is able to offer you the most usable, current, and beneficial learning experience ever.

The goal of *Exploring* is, as it has always been, to go farther than teaching just the steps to accomplish a task—the series provides the theoretical foundation for you to understand when and why to apply a skill. As a result, you achieve a deeper understanding of each application and can apply this critical thinking beyond Office and the classroom.

New to This Edition

Continual eText Updates: This edition of *Exploring* is written to Microsoft® Office 365®, which is constantly updating. In order to stay current with the software, we are committed to twice annual updates of the eText and Content Updates document available as an instructor resource for text users.

Focus on Mac: Mac usage is growing, and even outstripping PC usage at some four-year institutions. In response, new features such as Mac Tips, On a Mac step boxes, Mac Troubleshooting, and Mac tips on Student Reference Cards help ensure Mac users have a flawless experience using *Exploring*.

Expanded Running Case: In this edition, the Running Case has been expanded to all applications, with one exercise per chapter focusing on the New Castle County Technical Services case, providing a continuous and real-world project for students to work on throughout the semester.

Pre-Built Learning Modules: Pre-built inside MyLab IT, these make course setup a snap. The modules are based on research and instructor best practices, and can be easily customized to meet your course requirements.

Critical Thinking Modules: Pre-built inside MyLab IT, these pair a Grader Project with a critical thinking quiz that requires students to first complete a hands-on project, then reflect on what they did and the data or information they interacted with, to answer a series of objective critical thinking questions. These are offered both at the chapter level for regular practice, as well as at the Application level where students can earn a Critical Thinking badge.

What's New for MyLab IT Graders

Graders with WHY: All Grader project instructions now incorporate the scenario and the WHY to help students critically think and understand why they're performing the steps in the project.

Hands-On Exercise Assessment Graders: A new Grader in each chapter that mirrors the Hands-On Exercise. Using an alternate scenario and data files, this new Grader is built to be more instructional and features Learning Aids such as Read (eText), Watch (video), and Practice (guided simulation) in the Grader report to help students learn, remediate, and resubmit.

Auto-Graded Critical Thinking Quizzes:

- Application Capstones that allow students to earn a Critical Thinking badge
- Chapter-level quizzes for each Mid-Level Exercise Grader project

Improved Mac Compatibility in Graders: All Graders are tested for Mac compatibility and any that can be made 100% Mac compatible are identified in the course. This excludes Access projects as well as any that use functionality not available in Mac Office.

Autograded Integrated Grader Projects: Based on the discipline-specific integrated projects, covering Word, Excel, PowerPoint, and Access in various combinations.

Final Solution Image: Included with Grader student downloads, final output images allows students to visualize what their solution should look like.

What's New for MyLab IT Simulations

Updated Office 365, 2019 Edition Simulations: Written by the *Exploring* author team, ensures one-to-one content to directly match the Hands-On Exercises (Simulation Training) and mirror them with an alternate scenario (Simulation Assessment).

Student Action Visualization: Provides a playback of student actions within the simulation for remediation by students and review by instructors when there is a question about why an action is marked as incorrect.

Series Hallmarks

The **How/Why Approach** helps students move beyond the point and click to a true understanding of how to apply Microsoft Office skills.

- **White Pages/Yellow Pages** clearly distinguish the theory (white pages) from the skills covered in the Hands-On Exercises (yellow pages) so students always know what they are supposed to be doing and why.

- **Case Study** presents a scenario for the chapter, creating a story that ties the Hands-On Exercises together and gives context to the skills being introduced.

- **Hands-On Exercise Videos** are tied to each Hands-On Exercise and walk students through the steps of the exercise while weaving in conceptual information related to the Case Study and the objectives as a whole.

An **Outcomes focus** allows students and instructors to know the higher-level learning goals and how those are achieved through discreet objectives and skills.

- **Outcomes** presented at the beginning of each chapter identify the learning goals for students and instructors.

- **Enhanced Objective Mapping** enables students to follow a directed path through each chapter, from the objectives list at the chapter opener through the exercises at the end of the chapter.
  - **Objectives List:** This provides a simple list of key objectives covered in the chapter. This includes page numbers so students can skip between objectives where they feel they need the most help.
  - **Step Icons:** These icons appear in the white pages and reference the step numbers in the Hands-On Exercises, providing a correlation between the two so students can easily find conceptual help when they are working hands-on and need a refresher.
  - **Quick Concepts Check:** A series of questions that appear briefly at the end of each white page section. These questions cover the most essential concepts in the white pages required for students to be successful in working the Hands-On Exercises. Page numbers are included for easy reference to help students locate the answers.
  - **Chapter Objectives Review:** Located near the end of the chapter and reviews all important concepts in the chapter. Designed in an easy-to-read bulleted format.

- **MOS Certification Guide** for instructors and students to direct anyone interested in prepping for the MOS exam to the specific locations to find all content required for the test.

End-of-Chapter Exercises offer instructors several options for assessment. Each chapter has approximately 11–12 exercises ranging from multiple choice questions to open-ended projects.

- **Multiple Choice, Key Terms Matching, Practice Exercises, Mid-Level Exercises, Running Case, Disaster Recovery, and Capstone Exercises** are at the end of all chapters.
  - **Enhanced Mid-Level Exercises** include a **Creative Case** (for PowerPoint and Word), which allows students some flexibility and creativity, not being bound by a definitive solution, and an **Analysis Case** (for Excel and Access), which requires students to interpret the data they are using to answer an analytic question.

- **Application Capstone** exercises are included in the book to allow instructors to test students on the contents of a single application.

The Exploring Series and MyLab IT

The *Exploring Series* has been a market leader for more than 20 years, with a hallmark focus on both the *how* and *why* behind what students do within the Microsoft Office software. In this edition, the pairing of the text with MyLab IT Simulations, Graders, Objective Quizzes, and Resources as a fully complementary program allows students and instructors to get the very most out of their use of the *Exploring Series*.

To maximize student results, we recommend pairing the text content with MyLab IT, which is the teaching and learning platform that empowers you to reach every student. By combining trusted author content with digital tools and a flexible platform, MyLab personalizes the learning experience and helps your students learn and retain key course concepts while developing skills that future employers are seeking in their candidates.

Solving Teaching and Learning Challenges

Pearson addresses these teaching and learning challenges with *Exploring* and MyLab IT 2019.

Reach Every Student

MyLab IT 2019 delivers trusted content and resources through easy-to-use, Prebuilt Learning Modules that promote student success. Through an authentic learning experience, students become sharp critical thinkers and proficient in Microsoft Office, developing essential skills employers seek.

Practice and Feedback: What do I do when I get stuck or need more practice?

MyLab IT features **Integrated Learning Aids** within the Simulations and now also within the Grader Reports, allowing students to choose to Read (via the eText), Watch (via an author-created hands-on video), or Practice (via a guided simulation) whenever they get stuck. These are conveniently accessible directly within the simulation training so that students do not have to leave the graded assignment to access these helpful resources. The **Student Action Visualization** captures all the work students do in the Simulation for both Training and Assessment and allows students and instructors to watch a detailed playback for the purpose of remediation or guidance when students get stuck. MyLab IT offers **Grader project reports** for coaching, remediation, and defensible grading. Score Card Detail allows you to easily see where students were scored correctly or incorrectly, pointing out how many points were deducted on each step. Live Comments Report allows you and the students to see the actual files the student submitted with mark-ups/comments on what they missed and now includes Learning Aids to provide immediate remediation for incorrect steps.

Application, Motivation, and Employability Skills: Why am I taking this course, and will this help me get a job?

Students want to know that what they are doing in this class is setting them up for their ultimate goal—to get a job. With an emphasis on **employability skills** like critical thinking and other soft skills, **digital badges** to prove student proficiency in Microsoft skills and critical thinking, and **MOS Certification practice materials** in MyLab IT, the *Exploring Series* is putting students on the path to differentiate themselves in the job market, so that they can find and land a job that values their schools once they leave school.

Application: How do I get students to apply what they've learned in a meaningful way?

The *Exploring Series* and MyLab IT offer instructors the ability to provide students with authentic formative and summative assessments. The realistic and hi-fidelity **simulations** help students feel like they are working in the real Microsoft applications and allow them to explore, use 96% of Microsoft methods, and do so without penalty. The **Grader projects** allow students to gain real-world context as they work live in the application, applying both an understanding of how and why to perform certain skills to complete a project. New **Critical Thinking quizzes** require students to demonstrate their understanding of why, by answering questions that force them to analyze and interpret the project they worked on to answer a series of objective questions. The new **Running Case** woven through all applications requires students to apply their knowledge in a realistic way to a long-running, semester-long project focused on the same company.

Ease of Use: I need a course solution that is easy to use for both me and my students

MyLab IT 2019 is the easiest and most accessible in its history. With new **Prebuilt Learning** and **Critical Thinking Modules** course set-up is simple! **LMS integration capabilities** allow users seamless access to MyLab IT with single sign-on, grade sync, and asset-level deep linking. Continuing a focus on accessibility, MyLab IT includes an **integrated Accessibility Toolbar** with translation feature for students with disabilities, as well as a **Virtual Keyboard** that allows students to complete keyboard actions entirely on screen. There is also an enhanced focus on Mac compatibility with even more Mac-compatible Grader projects,

Developing Employability Skills

High-Demand Office Skills are taught to help students gain these skills and prepare for the Microsoft Office Certification exams (MOS). The MOS objectives are covered throughout the content, and a MOS Objective Appendix provides clear mapping of where to find each objective. Practice exams in the form of Graders and Simulations are available in MyLab IT.

Badging Digital badges are available for students in Introductory and Advanced Microsoft Word, Excel, Access, and PowerPoint. This digital credential is issued to students upon successful completion (90%+ score) of an Application Capstone Badging Grader project. MyLab IT badges provide verified evidence that learners have demonstrated specific skills and competencies using Microsoft Office tools in a real project and help distinguish students within the job pool. Badges are issued through the Acclaim system and can be placed in a LinkedIn ePortfolio, posted on social media (Facebook, Twitter), and/or included in a résumé. Badges include tags with relevant information that allow students to be discoverable by potential employers, as well as search for jobs for which they are qualified.

> "The badge is a way for employers to actually verify that a potential employee is actually somewhat fluent with Excel."—Bunker Hill Community College Student

The new **Critical Thinking Badge** in MyLab IT for 2019 provides verified evidence that learners have demonstrated the ability to not only complete a real project, but also analyze and problem-solve using Microsoft Office applications. Students prove this by completing an objective quiz that requires them to critically think about the project, interpret data, and explain why they performed the actions they did in the project. Critical Thinking is a hot button issue at many institutions and is highly sought after in job candidates, allowing students with the Critical Thinking Badge to stand out and prove their skills.

Soft Skills Videos are included in MyLab IT for educators who want to emphasize key employability skills such as Accepting Criticism and Being Coachable, Customer Service, and Resume and Cover Letter Best Practices.

Resources

Instructor Teaching Resources	
Supplements Available to Instructors at www.pearsonhighered.com/ exploring	**Features of the Supplement**
Instructor's Manual	Available for each chapter and includes: • List of all Chapter Resources, File Names, and Where to Find • Chapter Overview • Class Run-Down • Key Terms • Discussion Questions • Practice Projects & Applications • Teaching Notes • Additional Web Resources • Projects and Exercises with File Names • Solutions to Multiple Choice, Key Terms Matching, and Quick Concepts Checks
Solutions Files, Annotated Solution Files, Scorecards	• Available for all exercises with definitive solutions • Annotated Solution Files in PDF feature callouts to enable easy grading • Scorecards to allow for easy scoring for hand-grading all exercises with definitive solutions, and scoring by step adding to 100 points.
Rubrics	For Mid-Level Exercises without a definitive solution. Available in Microsoft Word format, enabling instructors to customize the assignments for their classes
Test Bank	Approximately 75–100 total questions per chapter, made up of multiple-choice, true/false, and matching. Questions include these annotations: • Correct Answer • Difficulty Level • Learning Objective Alternative versions of the Test Bank are available for the following LMS: Blackboard CE/Vista, Blackboard, Desire2Learn, Moodle, Sakai, and Canvas
Computerized TestGen	TestGen allows instructors to: • Customize, save, and generate classroom tests • Edit, add, or delete questions from the Test Item Files • Analyze test results • Organize a database of tests and student results
PowerPoint Presentations	PowerPoints for each chapter cover key topics, feature key images from the text, and include detailed speaker notes in addition to the slide content. PowerPoints meet accessibility standards for students with disabilities. Features include, but are not limited to: • Keyboard and Screen Reader access • Alternative text for images • High color contrast between background and foreground colors

Scripted Lectures	• A lecture guide that provides the actions and language to help demonstrate skills from the chapter • Follows the activity similar to the Hands-On Exercises but with an alternative scenario and data files
Prepared Exams	• An optional Hands-On Exercise that can be used to assess students' ability to perform the skills from each chapter, or across all chapters in an application. • Each Prepared Exam folder includes the needed data files, instruction file, solution, annotated solution, and scorecard.
Outcome and Objective Maps	• Available for each chapter to help you determine what to assign • Includes every exercise and identifies which outcomes, objectives, and skills are included from the chapter
MOS Mapping, MOS Online Appendix	• Based on the Office 2019 MOS Objectives • Includes a full mapping of where each objective is covered in the materials • For any content not covered in the textbook, additional material is available in the Online Appendix document
Transition Guide	A detailed spreadsheet that provides a clear mapping of content from Exploring Microsoft Office 2016 to Exploring Microsoft Office 365, 2019 Edition
Content Updates Guide	A living document that features any changes in content based on Microsoft Office 365 changes as well as any errata
Assignment Sheets	Document with a grid of suggested student deliverables per chapter that can be passed out to students with columns for Due Date, Possible Points, and Actual Points
Sample Syllabus	Syllabus templates set up for 8-week, 12-week, and 16-week courses
Answer Keys for Multiple Choice, Key Terms Matching, and Quick Concepts Check	Answer keys for each objective, matching, or short-answer question type from each chapter

Student Resources	
Supplements Available to Students at www.pearsonhighered.com/ exploring	**Features of the Supplement**
Student Data Files	All data files needed for the following exercises, organized by chapter: • Hands-On Exercises • Practice Exercises • Mid-Level Exercises • Running Case • Disaster Recovery Case • Capstone Exercise
MOS Certification Material	• Based on the Office 2019 MOS Objectives • Includes a full mapping of where each objective is covered in the materials • For any content not covered in the textbook, additional material is available in the Online Appendix document

(ex·ploring)

SERIES

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COMPREHENSIVE

Office 365 Common Features

LEARNING OUTCOME

You will apply skills common across the Microsoft Office suite to create and format documents and edit content in Office 365 applications.

OBJECTIVES & SKILLS: After you read this chapter, you will be able to:

CASE STUDY | Spotted Begonia Art Gallery

You are an administrative assistant for Spotted Begonia, a local art gallery. The gallery does a lot of community outreach to help local artists develop a network of clients and supporters. Local schools are invited to bring students to the gallery for enrichment programs.

As the administrative assistant for Spotted Begonia, you are responsible for overseeing the production of documents, spreadsheets, newspaper articles, and presentations that will be used to increase public awareness of the gallery. Other clerical assistants who are familiar with Microsoft Office will prepare the promotional materials, and you will proofread, make necessary corrections, adjust page layouts, save and print documents, and identify appropriate templates to simplify tasks. Your experience with Microsoft Office is limited, but you know that certain fundamental tasks that are common to Word, Excel, and PowerPoint will help you accomplish your oversight task. You are excited to get started with your work!

Taking the First Step

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FIGURE 1.1 Spotted Begonia Art Gallery Documents

CASE STUDY | Spotted Begonia Art Gallery

Starting Files	Files to be Submitted
cf01h1Letter.docx **Seasonal Event Flyer Template**	**cf01h1Letter_LastFirst.docx** **cf01h3Flyer_LastFirst.docx**

MyLab IT Grader An alternate version of this project is available as a MyLab IT Grader Assessment

Get Started with Office Applications

Organizations around the world rely heavily on Microsoft Office software to produce documents, spreadsheets, presentations, and databases. *Microsoft Office* is a productivity software suite that includes a set of software applications, each one specializing in a specific type of output. There are different versions of Office. Office 365 is purchased as a monthly or annual subscription and is fully installed on your PC, tablet, and phone. With Office 365, you receive periodic updates of new features and security measures. Office 365 also includes access to OneDrive storage. Office 2019 is a one-time purchase and fully installed on your PC. Periodic upgrades are not available. Both Office 365 and Office 2019 have versions that run on a Mac.

All versions of Microsoft Office include Word, Excel, and PowerPoint, as well as some other applications. Some versions of Office also include Access. Office 365 for Mac and Office for Mac include Word, Excel, and PowerPoint, but not Access. *Microsoft Word* (Word) is a word processing application, used to produce all sorts of documents, including memos, newsletters, reports, and brochures. *Microsoft Excel* (Excel) is a financial spreadsheet program, used to organize records, financial transactions, and business information in the form of worksheets. *Microsoft PowerPoint* (PowerPoint) is presentation software, used to create dynamic presentations to inform and persuade audiences. Finally, *Microsoft Access* (Access) is a database program, used to record and link data, query databases, and create forms and reports. The choice of which software application to use really depends on what type of output you are producing. Table 1.1 describes the major tasks of the four primary applications in Microsoft Office.

TABLE 1.1	Microsoft Office Applications
Office Application	**Application Characteristics**
Word	Word processing software used with text and graphics to create, edit, and format documents.
Excel	Spreadsheet software used to store quantitative data and to perform accurate and rapid calculations, what-if analyses, and charting, with results ranging from simple budgets to sophisticated financial and statistical analyses.
PowerPoint	Presentation graphics software used to create slide shows for presentation by a speaker or delivered online, to be published as part of a website, or to run as a stand-alone application on a computer kiosk.
Access	Relational database software used to store data and convert it into information. Database software is used primarily for decision making by businesses that compile data from multiple records stored in tables to produce informative reports.

These programs are designed to work together, so you can integrate components created in one application into a file created by another application. For example, you could integrate a chart created in Excel into a Word document or a PowerPoint presentation, or you could export a table created in Access into Excel for further analysis. You can use two or more Office applications to produce your intended output.

In addition, Microsoft Office applications share common features. Such commonality gives a similar feel to each software application so that learning and working with each Office software application is easier. This chapter focuses on many common features that the Office applications share. Although Word is primarily used to illustrate many examples, you are encouraged to open and explore Excel and PowerPoint (and to some degree, Access) to examine the same features in those applications. As a note, most of the content in this chapter and book are for the Windows-based Office applications. Some basic information about Office for Mac is included in TIP boxes and in the Step boxes when there are significant differences to point out.

In this section, you will learn how to log in with your Microsoft account, open an application, and open and save a file. You will also learn to identify interface components common to Office software applications, such as the ribbon, Backstage view, and the Quick Access Toolbar. You will experience Live Preview. You will learn how to get help with an application. You will also learn about customizing the ribbon and using Office add-ins.

Starting an Office Application

Microsoft Office applications are launched from the Start menu. Select the Start icon ⊞ to display the Start menu and select the app tile for the application in which you want to work (see Figure 1.2). Note: The Start menu in Figure 1.2 may show different tiles and arrangement of tiles than what is on your Start menu. If the application tile you want is not on the Start menu, you can open the program from the list of all apps on the left side of the Start menu, or alternatively, you can use search on the taskbar. Just type the name of the program in the search box and press Enter. The program will open automatically.
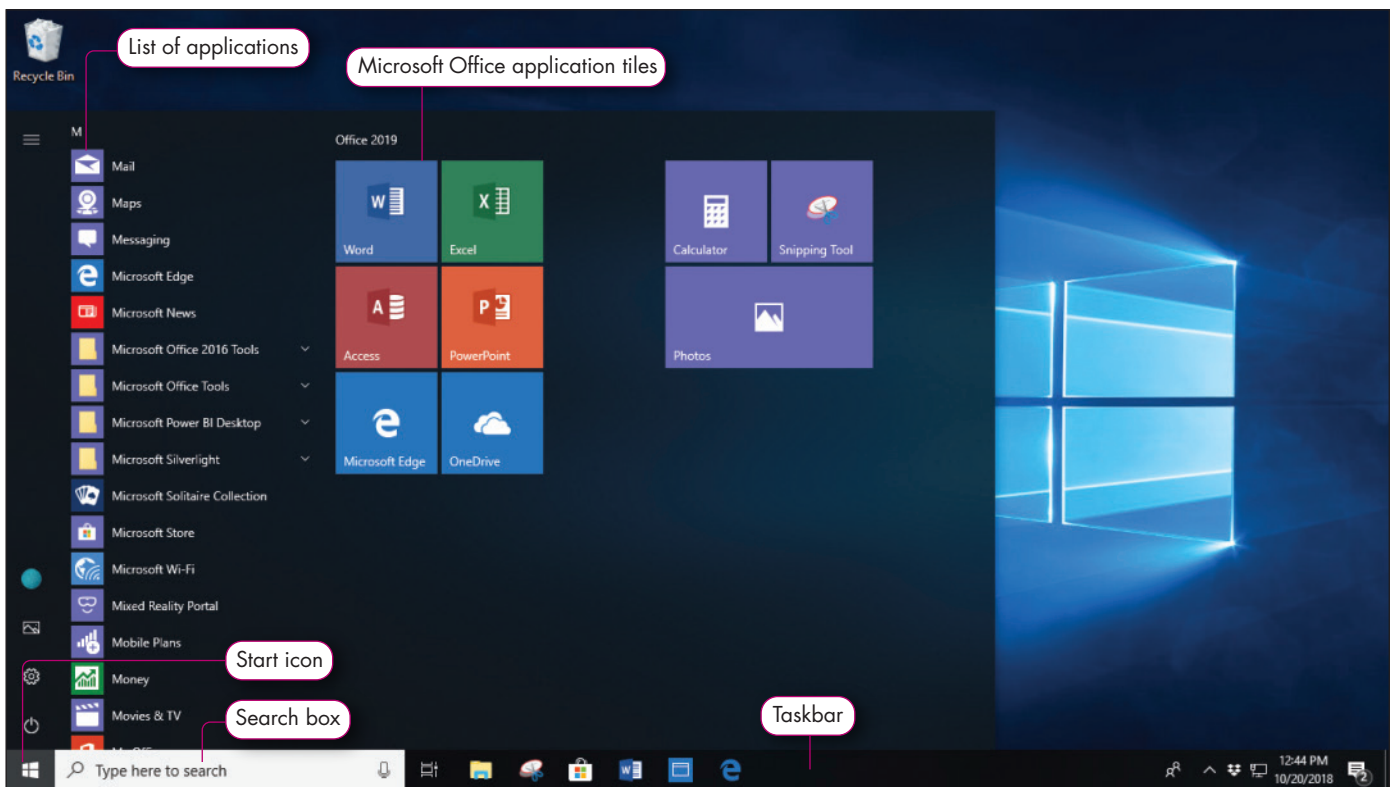
FIGURE 1.2 Windows Start Menu

Use Your Microsoft Account

When you have a Microsoft account, you can sign in to any Windows computer and you will be able to access the saved settings associated with your Microsoft account. That means any computer can have the same familiar look that you are used to seeing on your home or school computers and devices. Your Microsoft account will automatically sign in to all the apps and services that use a Microsoft account, such as OneDrive and Outlook. If you share your computer with another user, each user can have access to his or her own Microsoft account, and can easily switch between accounts by logging out of one Microsoft account and logging in to another Microsoft account. You can switch accounts within an application as well.

To switch between accounts in an application such as Word, complete the following steps:

1. Click the profile name at the top-right of the application.
2. Select Switch account.
3. Select an account from the list, if the account has already been added to the computer, or add a new account.

On a Mac, to switch between accounts in an application, complete the following steps:

1. Click the application menu (Word, Excel, etc.), click Sign Out, and then click Sign Out again.
2. Click File, click New From Template, and then click Sign in at top of the left pane.
3. Click Sign in again, type your user email, click Next, type password, and then click Sign in.

Use OneDrive

Having a Microsoft account also provides additional benefits, such as being connected to all of Microsoft's resources on the Internet. These resources include an Outlook email account and access to OneDrive cloud storage. *Cloud storage* is a technology used to store files and work with programs that are stored in a central location on the Internet. *OneDrive* is a Microsoft app used to store, access, and share files and folders on the Internet. OneDrive is the default storage location when saving Office files. Because OneDrive stores files on the Internet, when a document has been saved in OneDrive the most recent version of the document will be accessible when you log in from any computer connected to the Internet. Files and folders saved to OneDrive can be available offline and accessed through File Explorer—Windows' file management system. Moreover, changes made to any document saved to OneDrive will be automatically updated across all devices, so each device you access with your Windows account will all have the same version of the file.

OneDrive enables you to collaborate with others. You can share your documents with others or edit a document on which you are collaborating. You can even work with others simultaneously on the same document.

STEP 1   Working with Files

When working with an Office application, you can begin by opening an existing file that has already been saved to a storage medium or you can begin work on a new file or template. When you are finished with a file, you should save it, so you can retrieve it at another time.

Create a New File

After opening an Office application, you will be presented with template choices. Use the Blank document (workbook, presentation, database, etc.) template to start a new blank file. You can also create a new Office file from within an application by selecting New from the File tab.

The File tab is located at the far left of the ribbon. When you select the File tab, you see *Backstage view*. Backstage view is where you manage your files and the data about them—creating, saving, printing, sharing, inspecting for accessibility, compatibility, and other document issues, and accessing other setting options. The File tab and Backstage view is where you do things "to" a file, whereas the other tabs on the ribbon enable you to do things "in" a file.

Save a File

Saving a file enables you to open it for additional updates or reference later. Files are saved to a storage medium such as a hard drive, flash drive, or to OneDrive.

The first time you save a file, you indicate where the file will be saved and assign a file name. It is best to save the file in an appropriately named folder so you can find it easily later. Thereafter, you can continue to save the file with the same name and location using the Save command. If the file is saved in OneDrive, any changes to the file will be automatically saved. You do not have to actively save the document. If you want more control over when changes to your document are saved, you have the option to turn this feature off (or back on) with the AutoSave feature in the Quick Access Toolbar.

There are instances where you will want to rename the file or save it to a different location. For example, you might reuse a budget saved as an Excel worksheet, modifying it for another year, and want to keep a copy of both the old and revised budgets. In this instance, you would save the new workbook with a new name, and perhaps save it in a different folder. To do so, use the Save As command, and continue with the same procedure to save a new file: navigating to the new storage location and changing the file name. Figure 1.3 shows a typical Save As pane that enables you to select a location before saving the file. Notice that OneDrive is listed as well as This PC. To navigate to a specific location, use Browse.
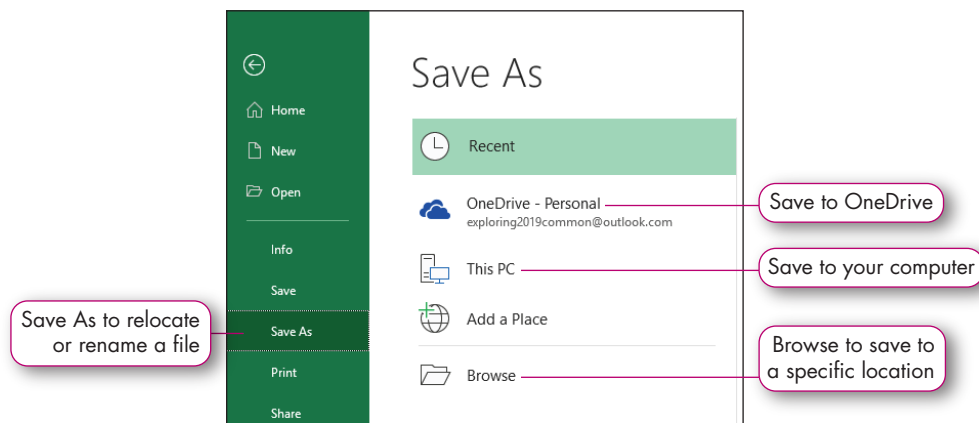

FIGURE 1.3 Save As in Backstage View

To save a file with a different name and/or file location, complete the following steps:

1. Click the File tab.
2. Click Save As.
3. Select a location or click Browse to navigate to the file storage location.
4. Type the file name.
5. Click Save.

STEP 2 ## Open a Saved File

Often you will need to work on an existing file that has been saved to a storage location. This may be an email attachment that you have downloaded to a storage device, a file that has been shared with you in OneDrive, or a file you have previously created. To open an existing file, navigate in File Explorer to the folder or drive where the document is stored, and then double-click the file name to open the file. The application and the file will open. Alternatively, if the application is already open, from Backstage view, click Open, and then click Browse, This PC, or OneDrive to locate and open the file (see Figure 1.4).

> **MAC TIP:** To open an existing file, navigate in Finder to the folder or drive where the document is stored and double-click the file name to open the file.
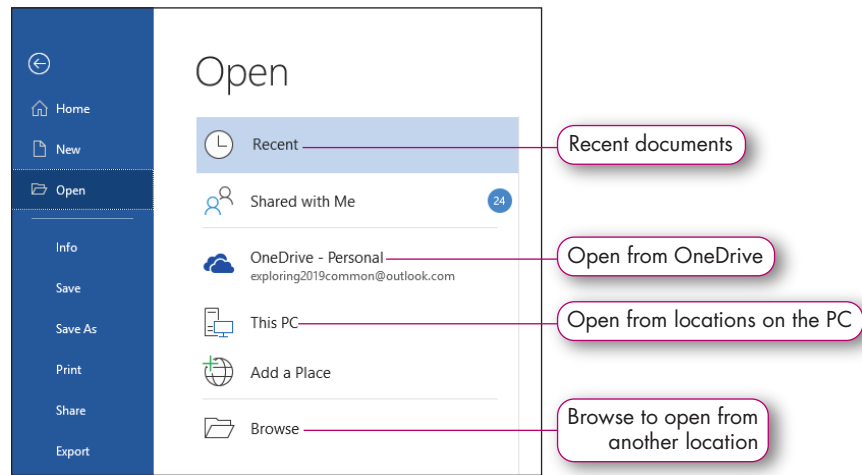
FIGURE 1.4 Open in Backstage View

Office simplifies the task of reopening files by providing a Recent documents list with links to your most recently used files, as shown in Figure 1.5. When opening the application, the Recent list displays in the center pane. The Recent list changes to reflect only the most recently opened files, so if it has been quite some time since you worked with a particular file, or if you have worked on several other files in between and you do not see your file listed, you can click More documents (or Workbooks, Presentations, etc).
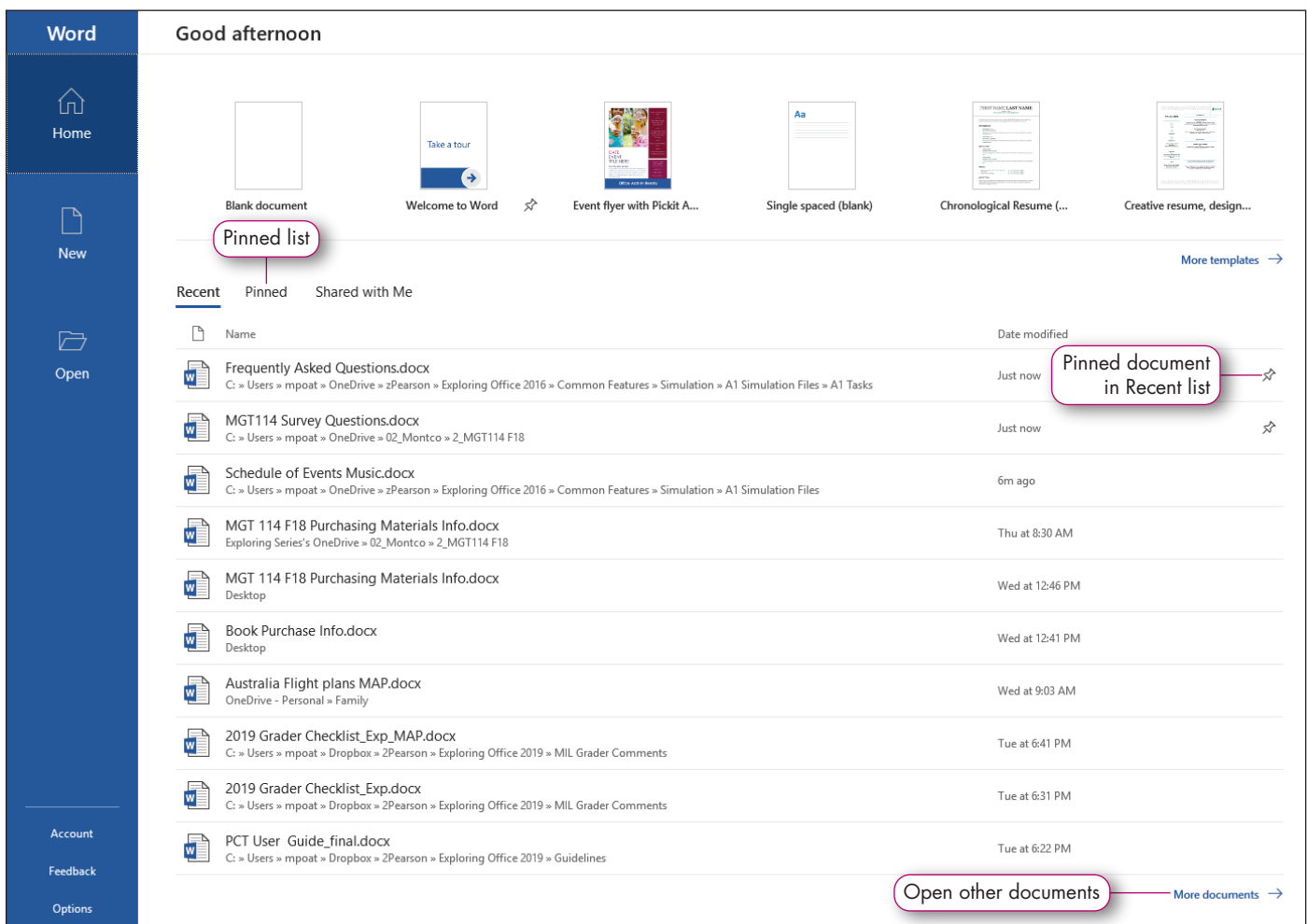

FIGURE 1.5 Recent Documents List

TIP: KEEPING FILES ON THE RECENT DOCUMENTS LIST

The Recent list displays a limited list of only the most recently opened files. However, you might want to keep a particular file in the list regardless of how recently it was opened. In Figure 1.5, note that the *Pin this item to the list* icon 📌 displays to the right of each file. Select the icon to pin the file to the list. The pushpin of the "permanent" file will change direction so that it appears to be inserted, indicating that it is a pinned item. Once pinned, you will always have access to the file from the Pinned list. Later, if you want to remove the file from the list, click the pushpin icon. The file will remain on the Recent documents list while it is being used, but will be bumped off the list when other, more recently opened files take its place.

Using Common Interface Components

When you open any Office application, you will first notice the title bar and ribbon (see Figure 1.6) at the top of the document. These features enable you to identify the document, provide easy access to frequently used commands, and controls the window in which the document displays. The *title bar* identifies the current file name and the application in which you are working. It also includes control buttons that enable you to minimize, restore down, or close the application window. The Quick Access Toolbar, on the left side of the title bar, enables you to turn AutoSave on or off, save the file, undo or redo editing, and customize the Quick Access Toolbar. Located just below the title bar is the ribbon. The *ribbon* is the command center of Office applications containing tabs, groups, and commands. If you are working with a large project, you can maximize your workspace by temporarily hiding the ribbon. There are several methods that can be used to hide and then redisplay the ribbon:

- Double-click any tab name to collapse; click any tab name to expand
- Click the Collapse Ribbon arrow at the far-right side of the ribbon
- Use the Ribbon Display Option on the right side of the Title bar. These controls enable you to not only collapse or expand the ribbon, but also to choose whether you want to see the tabs or no tabs at all.
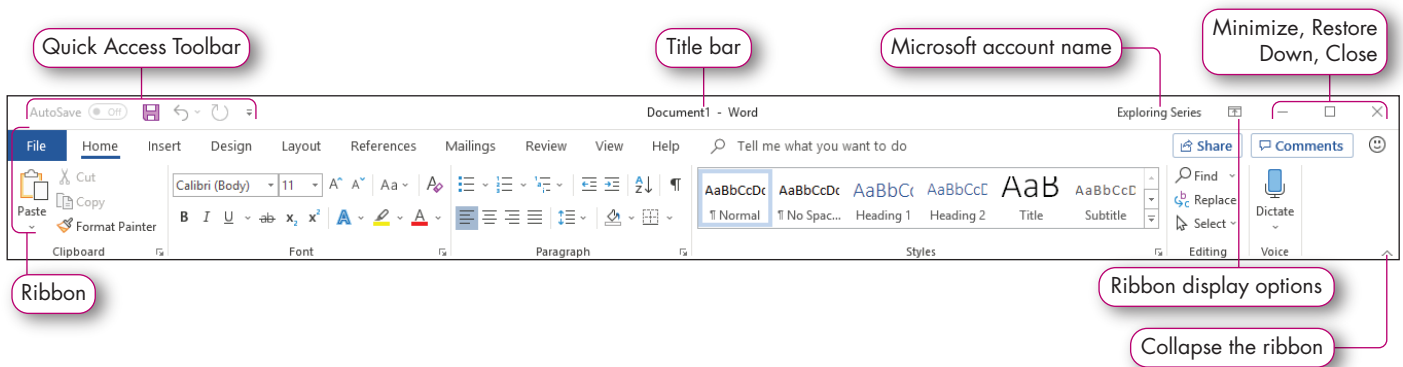

FIGURE 1.6 The Title Bar, Quick Access Toolbar, and Document Controls

Use the Ribbon

The main organizational grouping on the ribbon is tabs. The *tab* name indicates the type of commands located on the tab. On each tab, the ribbon displays several task-oriented groups. A *group* is a subset of a tab that organizes similar commands together. A *command* is a button or task within a group that you select to perform a task (see Figure 1.7). The ribbon with the tabs and groups of commands is designed to provide efficient functionality. For that reason, the Home tab displays when you first open a file in an Office software application and contains groups with the most commonly used commands for that application. For example, because you often want to change the way text is displayed, the Home tab in an Office application includes a Font group, with commands related to