Hundreds of timesaving solutions

Microsoft

Supremely well-organized, packed with expert advice

Microsoft Office Inside OUT

(Office 2021 and Microsoft 365)

Joe Habraken



Microsoft Office Inside Out

(Office 2021 and Microsoft 365)

Joe Habraken

Microsoft Office Inside Out (Office 2021 and Microsoft 365)

Table of Contents

Cover

Title Page

Copyright Page

Contents at a Glance

Table of Contents

Introduction

Who this book is for

Assumptions about you

How this book is organized

Errata, uspdates & book support

Part I: Getting started with the Microsoft 365 apps

Chapter 1 Getting oriented to the Microsoft 365 applications

Introducing Microsoft 365

New features and tools in Microsoft 365

Collaborating in the cloud

Collaborating with Microsoft Teams

Other 365 improvements and updates

The 365 suite applications

The different versions of the 365 app suite

Hardware and software requirements for 365

Installing Microsoft 365

Getting Help in the 365 applications



Chapter 2 Navigating and customizing the 365 interface

Getting familiar with the 365 interface

Galleries

Contextual tabs

Overview of the 365 application window

Navigating the 365 applications

Working with the ribbon

Working in the Backstage

Customizing an application interface

Customizing the ribbon

Customizing the Quick Access Toolbar

Customizing the status bar

Configuring application options

Advanced Options settings

Add-ins

Using Application add-ins

Using the Trust Center

Trusted publishers

Trusted locations

Chapter 3 Managing and sharing 365 files

Understanding 365 file formats

Saving files as different file types

Converting files to different file types

Configuring save file options

Creating and managing files

Managing files

Creating a new folder

Creating a new library

Viewing file versions in an application

Searching for 365 files

Protecting a 365 file

Preparing a file for sharing



Chapter 4 Using and creating graphics

The 365 options for graphics and pictures

Working with SmartArt graphics

Inserting SmartArt graphics

Modifying SmartArt graphics

Working with your digital pictures

Inserting pictures

Adjusting pictures

Cropping an image

Using the Background Removal tool

Using shapes and the 365 drawing tools

Adding and combining multiple shapes

Using the Shape Format tools

Using the screenshot tool

Using WordArt

Chapter 5 Using the 365 Online apps

What the Online apps can do

Where the Online apps live

Saving Online application files to the cloud

Saving a file to OneDrive or OneDrive for Business

Sharing a file saved to the cloud

Using the Word Online app

The Word Online app's File tab

The Word Online app's Home tab

The Word Online app's Insert tab

The Word Online app's Review tab

The Word Online app's View tab

Using Excel Online

The Excel Online app's File tab

Working in the Excel Online app

Inserting functions and charts in the Excel Online app

Using PowerPoint Online



Working with slides
Adding pictures and SmartArt

Part II: Word

Chapter 6 Essential Word features

Introducing Word

The Word interface

New features and improvements

Options for creating a new Word document

Using templates

Creating a template

Attaching a template

Navigating a Word document

Moving around a document with the mouse

Moving around a document with the keyboard

Selecting text

Understanding document formatting

Character formatting versus paragraph formatting

Manual formatting versus styles and themes

Working with fonts and text formatting

Formatting text

Working with paragraph formatting

Setting paragraph alignment

Changing line spacing

Setting line and page breaks

Setting indents

Working with tabs

Page layout: margins and page options

Changing margins

Changing page orientation and paper size

Inserting page breaks

Printing documents

Chapter 7 Enhancing Word documents



Creating better documents

Creating bulleted and numbered lists

Bulleted lists

Numbered lists

Multilevel lists

Working with borders and shading

Formatting with themes

Creating headers and footers

Inserting headers and footers

The header and footer tools

Working with page numbering

Inserting pictures and charts

Inserting pictures

Inserting stock images and online pictures

Inserting a chart

Integrating text and images

Changing the document display

Using the navigation pane

Using the Outline view

Splitting the document window

Using the Editor

Running the Editor

Using the Thesaurus

Using the Search feature

Working with Quick Parts

Creating and inserting an AutoText entry

Creating and inserting building blocks

Configuring AutoCorrect

Understanding styles

Using the Styles gallery

Creating styles

Editing styles



Managing styles

Chapter 8 Working with tables, columns, and sections

Options for adding a table

Inserting a table

Drawing a table

Converting text to a table

Entering and deleting text and navigating a table

Selecting and positioning a table

Formatting tables

Adjusting columns and rows

Formatting cells

Using table styles

Sorting table data

Using formulas in tables

Adding columns to a document

Understanding sections

Adding and removing section breaks

Formatting page attributes in a section

Chapter 9 Managing mailings and forms

Options for mail-related documents

Creating an envelope

Creating a label or labels

Understanding mass mailings

Performing a mail merge

Using the mail merge commands

Understanding recipient lists

Creating a recipient list

Editing and manipulating a recipient list

Using merge fields

Using merge rules

Previewing merge results

Completing the merge



Creating merged envelopes and labels

Understanding Word fields

Building a form with form controls

Chapter 10 Creating special documents

Options for large documents

Creating a table of contents

Creating a table of contents with built-in styles

Creating a table of contents with your own styles

Adding entries and updating the TOC

Building a TOC with field codes

Working with captions and tables of figures

Inserting a caption

Inserting a table of figures

Using cross-references

Generating an index

Marking index entries

Inserting the index

Working with citations and bibliographies

Creating citations

Managing citations

Inserting the bibliography

Inserting footnotes and endnotes

Tracking document changes

Options for viewing changes

Reviewing changes

Comparing documents

Building a better "big" document

Creating bookmarks

Inserting comments

Creating a master document

Working in Outline view

Creating subdocuments from scratch



Inserting existing document files into a master document outline Manipulating the master document

Part III: Excel

Chapter 11 Essential Excel features

Introducing Excel

Navigating the Excel workspace

The Excel ribbon

Moving around a worksheet

Creating workbooks and worksheets

Using Office.com templates

Inserting and rearranging worksheets

Managing Excel workbooks

Protecting workbooks and worksheets

Locking cells

Specifying edit ranges

Preparing a workbook for sharing

Recovering unsaved workbooks

Entering data in a worksheet

Entering labels

Entering values

Using AutoComplete

Filling and entering series

Copying, moving, and deleting cell contents

Using the Paste Special dialog box

Moving cells and ranges

Clearing and deleting cells

Editing cell content

Viewing worksheets

Printing worksheets

Using the Page Layout commands

Setting a print area

Inserting page breaks



Setting print titles

Working on the print page

Inserting headers and footers

Chapter 12 Worksheet formatting and management

Formatting text entries

Accessing the Format Cells dialog box

Changing text orientation

Formatting values

Using the Format Cells dialog box

Creating custom number formats

Adding comments and notes to cells

Inserting a Comment

Viewing and deleting comments

Inserting and deleting notes

Using themes

Formatting cells using borders and color

Adding cell borders

Using background colors

Using cell styles and the Format Painter

Creating a cell style

Using the Format Painter

Using conditional formatting

Using highlight cell rules

Using top/bottom rules

Using data bars

Using color scales

Using icon sets

Creating and copying conditional formatting rules

Manipulating cells and cell content

Inserting cells

Merging cells and wrapping text

Finding and replacing cell items



Working with columns and rows

Changing column width and row height

Inserting columns and rows

Deleting columns and rows

Hiding columns and rows

Working with worksheets

Freezing rows and columns

Splitting worksheets

Hiding worksheets

Naming ranges

Creating range names from selections

Managing range names

Adding images and graphics to worksheets

Chapter 13 Getting the most from formulas and functions

Performing calculations in Excel worksheets

Relative versus absolute referencing

Creating and editing formulas

Understanding operator precedence

Entering formulas

Editing formulas

Working with Excel functions

Entering a function in a cell

Using AutoSum

Using the status bar statistical functions

Using the Insert Function dialog box

Using the Function Library

Using range names in formulas and functions

Inserting a range name into a formula

Inserting a range name into a function

Referencing cells or ranges on other worksheets

Copying and moving formulas and functions

Choosing the right function



Financial functions

Logical functions

Statistical functions

Lookup & Reference functions

Date & Time functions

Text functions

Other function categories

Proofing your formulas and functions

Common error messages

Using the auditing tools

Using the Watch Window

Chapter 14 Enhancing worksheets with charts

Understanding Excel charts

Chart terminology

Using different chart types

Creating charts

Inserting a chart from the ribbon

Selecting a recommended chart

Inserting charts with the Quick Analysis gallery

Tools for Quickly customizing a chart

Moving, copying, or deleting a chart

Modifying a chart

Changing chart type or chart data

Selecting chart layouts and styles

Working with chart elements

Modifying titles and data labels

Working with the legend and data points

Manipulating axes and gridlines

Adding trendlines, drop lines, and bars to a chart

Creating a combination chart

Working with a pie of pie chart

Creating a custom combination chart

Using sparklines



Creating sparklines

Modifying sparklines

Chapter 15 Using Excel tables and pivot tables

Excel and databases

Defining a table range

Creating a table using styles

Using the Table Design Tools

Sorting table data

How Excel sorts data

Using the Sort dialog box

Filtering table data

Using the AutoFilter Search box

Creating custom AutoFilters

Filtering tables with slicers

Creating advanced filters

Creating custom sheet views

Using the data form

Creating outlines and subtotals

Working with external data

Importing data from Access

Importing a web table

Importing text files

Connecting to other data sources

Using Microsoft Query

Viewing and refreshing connections

Working with pivot tables

Using the Recommended PivotTables command

Creating a pivot table

Working with the pivot table tools

Using slicers

Chapter 16 Validating and analyzing worksheet data



Taking advantage of data validation

Specifying validation criteria

Configuring input messages and error alerts

Circling invalid data

Performing a what-if analysis

Creating a data table

Creating scenarios

Viewing scenarios and creating reports

Using Goal Seek, Solver, and Forecast Sheet

Working with Goal Seek

Working with Solver

Creating a Forecast Sheet

Part IV: PowerPoint

Chapter 17 Essential PowerPoint features

PowerPoint

Options for creating a new presentation

Using templates

Using a theme to create a new presentation

Creating a presentation from an existing presentation

Inserting slides from the Reuse Slides task pane

Creating a template

Inserting new slides

Entering text

Inserting slides from a Word outline

Inserting other object content

Modifying a slide's layout

Working with slides in different views

Zooming in and out

Rulers, gridlines, and guides

Color/grayscale commands

Opening a new presentation window

Rearranging and deleting slides



Modifying bulleted lists

Using numbered lists

Viewing a presentation during editing

Chapter 18 Advanced presentation formatting, themes, and masters

Working with text boxes and formatting

Inserting a text box

Basic text formatting

Formatting a text box with the Shape Format tools

Selecting Quick styles and shape attributes

Shape fill, outline, and effects

Using WordArt styles and text settings

Arranging text in tables

Inserting a table on an existing slide

Formatting a table

Table layout commands

Working with themes

Applying themes

Applying theme variants

Creating a custom theme

Using headers and footers

Understanding masters

Altering and creating master slides

Creating layout masters

Using slide sections

Chapter 19 Better slides with pictures, objects, and SmartArt

Using graphics to enhance slides

Inserting a picture

Adding stock images to slides

Creating a photo album

Adjusting picture settings

Configuring album layout settings



Working with shapes

Inserting icons

Using SmartArt graphics

Inserting a SmartArt graphic

Converting text to a SmartArt graphic

Using the SmartArt tools

Adding charts to slides

Inserting a chart onto a slide

Modifying and formatting a chart

Working with slide objects

Grouping objects

Layering objects

Adding hyperlinks to slides

Using PowerPoint Designer

Chapter 20 Enhancing slides with animation, transitions, and multimedia

Animations versus transitions

Assigning animation to a slide object

Accessing additional animation effects

Using motion paths

Applying a motion path

Editing a motion path

Creating a custom motion path

Advanced animation techniques

Changing effect options

Adding additional animations

Using the animation painter

Including sound effects with animations

Setting timings for animations

Managing slide animations

Adding transitions to slides

Modifying transitions

Using the Morph transition



Adding sound to a slide

Editing sound options

The trim audio dialog box

Adding video to a slide

Inserting online video

Inserting a video file

Modifying your video clips

Chapter 21 Delivering a presentation and creating support materials

Planning your presentation

Checking the presentation for spelling and grammar errors

Running through a completed presentation

Using the presenter coach

Using the presenter view

Using hidden slides

Creating a custom slide show

Creating a self-running presentation

Setting up a slideshow

Rehearsing timings

Recording a slideshow

Creating an interactive presentation

Working with the notes and handout masters

Setting handout master options

Setting notes master options

Printing presentations, notes, and handouts

Exporting a presentation

Sharing your presentation

Part V: Outlook

Chapter 22 Outlook configuration and essential features

Introducing Outlook

Outlook and email accounts



Exchange ActiveSync

Outlook.com email

Internet email

Configuring Outlook at first start

Adding email accounts to Outlook

Understanding Outlook profiles

Creating a new profile

Managing profiles

Loading profiles

Understanding Outlook data files

Configuring Outlook for Microsoft Exchange Server

Creating personal folders files

Repairing Outlook data files

Importing and exporting data

Importing data

Exporting data

Navigating the Outlook workspace

Accessing Outlook items using the Navigation bar

Working with views in Outlook

Categorizing Outlook items

Searching for Outlook items

Using Advanced Find

Using search folders

Printing Outlook items

Chapter 23 Managing email in Outlook

Working in the Outlook window

Creating an email message

Using the Outlook Address Book

Setting message options

Specifying email format

Setting message flags, importance, and sensitivity

Configuring voting buttons, receipts, and delivery options



The Message Properties dialog box

Attaching files and items to a message

Attaching a business card

Attaching a calendar

Using themes and email stationery

Adding a signature

Sending mail

Recalling a message

Working with received email

Organizing messages in the Inbox

Showing messages as conversations

Filtering email

Setting Tasks options

Managing email

Using Quick Steps

Answering a message

Forwarding a message

Saving an attachment

Translating messages

Deleting messages

Printing mail

Moving email

Managing email accounts

Editing email account settings

Adding an email account automatically

Adding a mail account manually

Setting Outlook mail options

Chapter 24 Using the calendar for appointments and tasks

Navigating the calendar

Changing the calendar view

Change the time scale and time zone

Scheduling an appointment



Scheduling a recurring appointment

Scheduling an event

Editing and managing appointments

Searching the calendar

Sharing calendars

Creating a calendar share invitation

Opening a shared calendar

Viewing multiple calendars

Emailing calendar items

Emailing a calendar

Publishing a calendar online

Setting calendar options

Working with tasks

Using the Tasks folder

Creating a new task from the Tasks folder

Creating a recurring task

Assigning and accepting tasks

Viewing and managing tasks

Managing tasks

Setting Tasks options

Chapter 25 Working with contacts and planning meetings

Navigating the Contacts list

Creating a new contact

Entering contact details

Adding fields for a contact

Editing contact information

Editing a business card

Tagging contacts with flags and categories

Mapping a contact's address

Searching the Contacts folder

Organizing contacts with groups

Forwarding and sharing contacts



Forwarding contacts

Sharing contacts

Communicating with contacts

Contact actions

Printing contact information

Setting contact options

Scheduling meetings

Selecting the meeting location

Using the Scheduling Assistant

Viewing and editing meeting information

Responding to meeting requests

Chapter 26 Securing and maintaining Outlook

Security overview

Malware and antivirus software

Strong password protection

Configuring Outlook security settings

Encrypting email and using digital signatures

Options for encrypting email

Digitally signing emails

The perils of HTML email

Dealing with message attachments

Coping with junk email

Working with the junk email commands

Setting junk email options

Creating email rules

Creating a quick rule for a specific sender

Creating complex rules

The Rules Wizard

Managing rules

Archiving Outlook items

Configuring AutoArchive settings



Setting AutoArchive options for a folder

Archiving manually

Configuring an autoreply message

Part VI: Publisher

Chapter 27 Essential Publisher features

Introducing Publisher

Planning your publication

Working with publication templates

Creating a new publication

Using a template

Using blank sizes

Creating a new template

Navigating the Publisher workspace

Using the rulers and guides

Options for viewing the publication

Creating a business information set

Creating a new business information set

Creating additional business information sets

Working with text

Editing text in a text box

Creating your own text boxes

Formatting text boxes

Linking text boxes

Inserting a text file

Inserting illustrations

Options for inserting pictures

Formatting a picture

Inserting clip art

Inserting shapes

Using building blocks

Printing publications



Chapter 28 Advanced Publisher features

Adding pages to a publication

Configuring page settings

Changing the current template

Working with master pages

Placing objects on the master page

Inserting headers and footers

Creating master pages

Using tables in publications

Table design commands

Table layout commands

Manipulating publication objects .

Grouping objects

Layering objects

Swapping images

Merging data into a publication

Performing a mail merge

Performing a catalog merge

Fine-tuning your publications

The Spelling feature

Hyphenation

Design Checker

Part VII: Appendixes

Appendix A Microsoft 365 application integration

Sharing application data

Understanding object linking and embedding

Choosing between linking and embedding

Linking objects

Linking with Paste Special

Linking with the Paste Options gallery

Linking using the Object command



Updating and breaking links

Editing linked objects

Embedding objects

Embedding with Paste Special

Embedding using the Object command

Embedding new objects

Editing embedded objects

Sharing data with Outlook using actions

Appendix B Microsoft 365 macros

Macros and Office

Adding the Developer tab to the ribbon

Enabling macros in the Trust Center

Creating macro-enabled Office files

Understanding macros

Creating a macro

Recording a macro

Assigning a macro button to the Quick Access Toolbar

Running macros

Editing recorded macros

Exploring the VBA Editor

Stepping through a macro

Digitally signing macros

Index

