

2

OFFICE BASICS

Although the applications in the various Office suites aren't heavily integrated with one another, they do share some basic similarities. For example, saving files, working with windows, printing, and other basic operations vary little from one Office application to the next. In this chapter, you'll become acquainted with these "Office essentials." Once you understand how these procedures work in general, you'll have a better ability to grasp the specifics when they're discussed in depth in later chapters.

Launching Office Applications

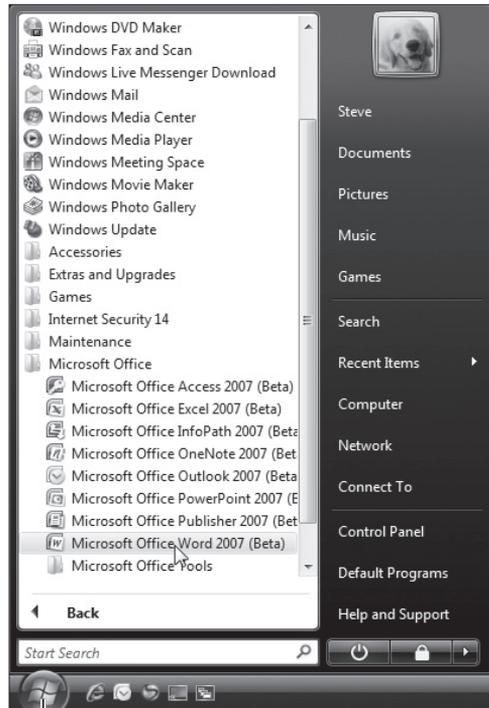
You launch Office applications (such as Word or Excel) in the same manner as any other Windows application.

To launch an Office application:

1. Click the Start button, All Programs, and the Microsoft Office folder (**Figure 2.1**).
The Microsoft Office folder expands, showing all installed Office 2007 applications.
2. Click the Office program you want to run.
The selected program launches.

✓ Tips

- You can also launch an Office application by doing any of the following:
 - ▲ If you recently ran the application, you can select its name from the list in the Start panel.
 - ▲ If you've created them, you can click a Desktop or Quick Launch shortcut icon for the application or any of its documents.
 - ▲ Open an Office document by clicking (or double-clicking) its file icon. The document opens in the appropriate Office application.
 - ▲ Choose a recently opened Office document from Windows Vista's Start > Recent Items submenu (**Figure 2.2**).
- Although the Start menus in Windows Vista and XP look different, they work similarly. In XP, click the Start button. Then move the cursor over All Programs and the Microsoft Office folder. Click the Office application you want to launch.
- You can also open the Start menu by pressing the Windows logo key on your keyboard.



Start button

Figure 2.1 A common way to launch programs is to choose them from the Start menu (Windows Vista shown).

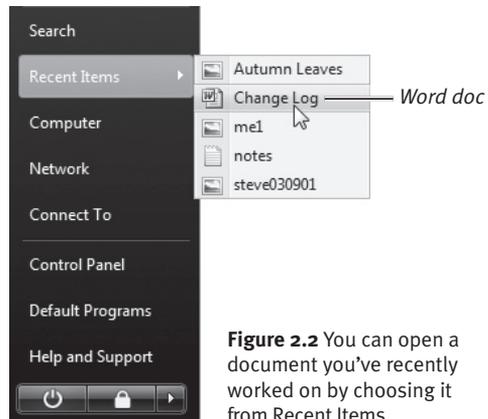


Figure 2.2 You can open a document you've recently worked on by choosing it from Recent Items.

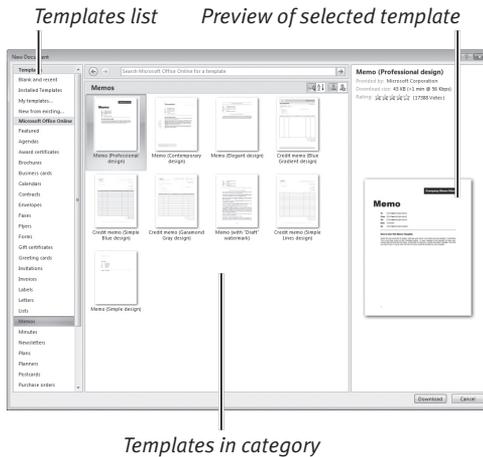


Figure 2.3 Pick a category from the Templates list, select a template, and click Create or Download (depending on whether the template is on your computer or is available from Microsoft Office Online).

Creating a New Document

By default, document-based Office programs (Word, Excel, and PowerPoint, for example) automatically create a new, blank document each time you launch the program. To create additional new documents when an Office program is running, perform the steps below.

To create a new document:

- ◆ *Do either of the following:*
 - ▲ Click the Office Button and choose New. Select the type of document you want to create from the dialog box that appears (**Figure 2.3**). Click the Create (or Download) button.
 - ▲ To skip the New Document, Worksheet, or Presentation dialog box and create a standard document, press **Ctrl+N**.

✓ Tips

- To create a standard document in Word, Excel, or PowerPoint, select Blank and recent from the Templates list, and then select Blank document, Blank worksheet, or Blank presentation, respectively. Select this same Templates category to base the document on a recently used template.
- Office has two kinds of templates: those installed on your computer and ones you can download as needed from Microsoft. To use one of the former, select Installed Templates. For a downloadable template, select a category from the Microsoft Office Online section of the Templates list.
- To base a new document on one of your own documents, select New from existing in the Templates list.
- Publisher does not have the new interface sported by the major Office applications. To create a new document, choose File > New, click the New toolbar icon, or press **Ctrl+N**.

Single- vs. Double-Clicking

Whether it requires a single or double click to open a folder, document, or program on your computer depends on a Folder Options control panel setting:

1. In Windows Vista or XP, click the Start button and choose Control Panel.
2. Open the Folder Options control panel.
3. In the Click items as follows section of the control panel, select the Single-click or Double-click radio button.
4. Click OK to save the new setting.

Opening Documents

In addition to creating new documents, you can open existing documents—to view, print, or revise them. You can open documents from within the appropriate Office application or from the Desktop (simultaneously launching the creating program, if it isn't already running).

To open an existing document from within an Office application:

1. Do one of the following:
 - ▲ **Word, Excel, PowerPoint.** Click the Office Button, and choose Open.
 - ▲ **Publisher.** Choose File > Open.
 - ▲ **Any program.** Press **Ctrl**+**O**.

The Open dialog box appears (**Figure 2.4**).

2. Navigate to the drive and folder that contains the document you want to open.
3. Select the document, and click Open.

If Folder Options have been set on your PC to open items by single-clicking them (see the sidebar on page 13), the selected document may open without having to click Open.

To open an existing Office document from the Desktop:

1. Locate the Office document file on the Desktop or in the folder where it's stored.
2. Do either of the following:
 - ▲ Click (or double-click) the file icon.
 - ▲ Right-click the file icon, and choose Open from the pop-up menu that appears (**Figure 2.5**).

The appropriate Office program launches (if it isn't already running), and the document opens.

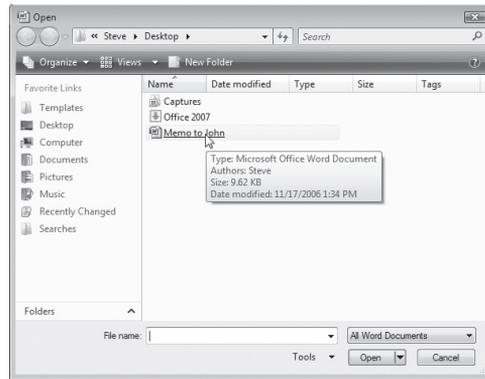


Figure 2.4 Select an Office document in the Open dialog box, and click Open (Windows Vista shown).

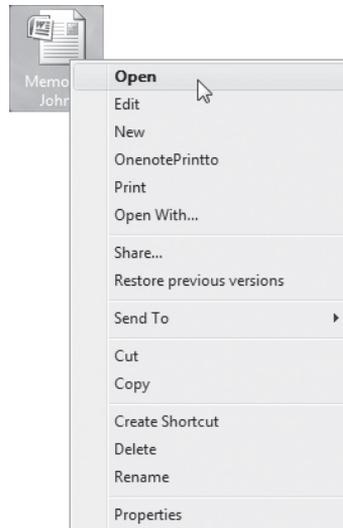


Figure 2.5 You can also open an Office document by right-clicking its file icon and choosing Open.

✓ Tip

- In Word, Excel, and PowerPoint, you can also open documents by clicking the Office Button and choosing a file from the Recent Documents list. In Publisher, recently opened documents are listed as choices at the bottom of the File menu.

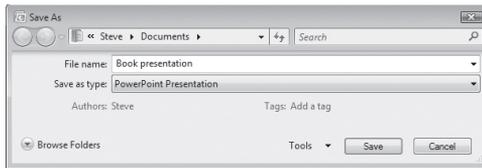


Figure 2.6 Use the Save As dialog box to save a new document. You also use it to save an edited document with a new name, format, or disk location. (To aid in selecting a folder or drive, click the Browse button.)

Saving in Outlook 2007

In general use, you seldom need to issue a Save command in Outlook. Unless you've disabled the option to Save copies of messages in the Sent Items folder (in the E-mail Options dialog box), all messages you create and send are automatically saved. And incoming messages are stored in each account's Inbox (or another folder you've designated via a message rule).

The only times you have to manually save an email message are when you want to:

- ◆ Store a draft of a message you aren't ready to send
- ◆ Save a copy of a message to disk

If you close a message without sending it, a dialog box appears in which you're offered the option of saving it. Click Yes to save the message in the Drafts folder. You can also store a message in progress in the Drafts folder by choosing File > Save ((Ctrl)S). (Drafts can be opened, edited, and sent whenever it's convenient.)

To save a message in a folder or on another disk, choose File > Save As, choose a format, and click Save. You can use Save As to save a copy of *any* message—whether a draft, sent, or received item.

Saving Documents

Until you save a document to disk, it exists only in your PC's memory. If you close the document or quit the application without saving, the document is gone forever.

To save a new document:

1. *Do one of the following:*
 - ▲ **Word, Excel, PowerPoint.** Click the Save icon on the Quick Access Toolbar, click the Office Button and choose Save, or click the Office Button and choose Save As > *file format*.
 - ▲ **Publisher.** Choose File > Save or File > Save As, or click the Save toolbar icon.
 - ▲ **Any program.** Press (Ctrl)S.
The Save As dialog box opens (**Figure 2.6**).

2. Enter a name in the File name box, navigate to the desired disk and folder, choose a file format from the Save as type drop-down menu, and click Save.

To save an edited document:

- ◆ *Do either of the following:*
 - ▲ To replace the current Word, Excel, or PowerPoint file with the edited version, click the Save icon in the Quick Access Toolbar, click the Office Button and choose Save, or press (Ctrl)S). In Publisher, choose File > Save, click the Save toolbar icon, or press (Ctrl)S).
 - ▲ You can save a *copy* of the edited document using a new name, in a different file format, and/or to a new disk location. In Word, Excel, or PowerPoint, click the Office Button and choose Save As > *format*. In Publisher, choose File > Save As. The Save As dialog box appears (see Figure 2.6). Specify a filename, format, and location, and click Save.

Closing Documents

It isn't necessary to quit an Office application just to work with another document. When you're done working with a document, you can close it. Closing documents frees up memory for working on other documents.

To close a document:

1. Make the document active that you want to close by doing one of the following:
 - ▲ **Any Office application.** Click the document's taskbar icon (**Figure 2.7**) at the bottom of the screen.
 - ▲ **Word, Excel, PowerPoint.** Click the View tab, and select the document name from the Switch Windows icon in the Window group (**Figure 2.8**).
 - ▲ **Publisher.** Choose the document's name from the Window menu (**Figure 2.9**).
2. Do one of the following:
 - ▲ Click the Office Button, and choose Close.
 - ▲ Click the close box (X) in the upper-right corner of the application window (**Figure 2.10**). If this is the *only* open document, the application quits.

The document closes. If the document has never been saved or contains unsaved edits, you're given an opportunity to save it.

✓ Tips

- Quitting an application automatically closes all open documents. If any of them contain unsaved edits, you're given an opportunity to save each one.
- When you have several Excel worksheets open, each has its own close box (found beneath the application's close box).



Figure 2.7 The taskbar displays an icon for each open document and application.

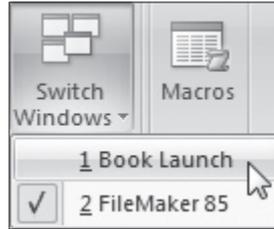


Figure 2.8 You can switch to any open document by selecting its name from the Switch Windows drop-down list.

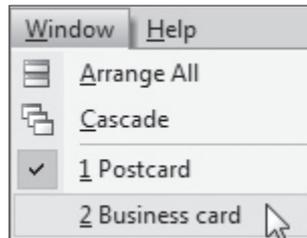


Figure 2.9 In Publisher, all open documents are listed in the Window menu.

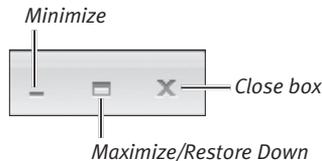


Figure 2.10 You can close a document in any program by clicking its close box.

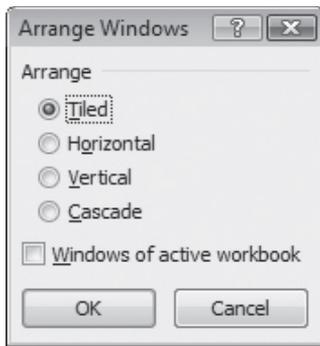


Figure 2.11 In Excel, you have great flexibility in arranging open workbook windows.



Figure 2.12 When you cascade documents, you can see the corner and title of each one.

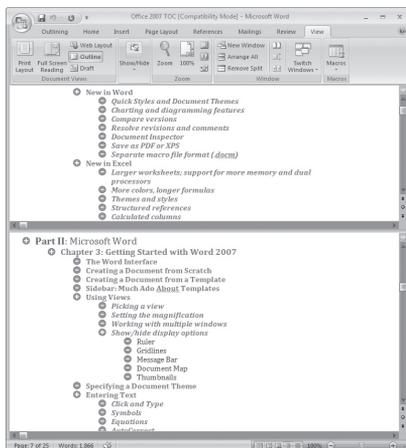


Figure 2.13 Split the window to simultaneously work in two sections of a document.

Working with Windows

If you occasionally have several documents open, you can arrange and manipulate their windows using Office commands. In Word, Excel, and PowerPoint, window management commands can be found in the Ribbon's Window group. In other Office applications, check the Window menu. (Note that the availability, location, and implementation of these commands varies from one Office program to the next.)

New Window. The New Window command creates a new instance of the current document. Use this command to view and work in two sections of a document at once.

Arrange All. This command simultaneously displays all open documents in an application. In Word, the documents are displayed one above the other. In PowerPoint, they're arranged side-by-side. In Excel, you can specify the arrangement of open documents in the dialog box that appears when you click Arrange All (**Figure 2.11**).

Cascade. Arranging documents in cascade fashion displays the upper-left corner of each one, enabling you to quickly switch documents by clicking an exposed corner (**Figure 2.12**). In PowerPoint, Cascade is an icon in the Ribbon's Window group. In Excel, select this option in the Arrange Windows dialog box (see **Figure 2.11**).

Split. Use this command to split the current document into halves (**Figure 2.13**), enabling you to work in two sections at the same time. In Excel, the split appears above the current cell. In Word, a split bar appears that you position by clicking. You can reposition a split by clicking and dragging the split bar. To remove a split in Excel, click the Split icon. In Word, click the Remove Split icon.

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Save Workspace. This command in the Window group of Excel's Ribbon saves the current arrangement of worksheets so you can restore it later. (To restore a saved workspace, open it as you would a worksheet.)

Every Office application also supports standard Windows controls and techniques for manipulating windows.

To use standard Windows controls:

- ◆ *Do any of the following:*
 - ▲ Click the Minimize button (see Figure 2.10) to minimize a window to the taskbar. (Click its taskbar icon to restore the window to its original onscreen position and size.)
 - ▲ The Maximize/Restore Down button has two states (**Figure 2.14**). When it's shown as a box, you can click it to *maximize* the window—filling the screen. When a window is maximized, the button displays a pair of boxes. Click it to restore the window to its original size and position (before you maximized the window).
 - ▲ To move a window to a new location, drag it by its title bar.
 - ▲ To manually resize a window, move the cursor over any edge or corner. When the cursor changes to a double arrow, click and drag to change the window's size.

✓ Tips

- In Publisher, the Arrange All and Cascade commands are found in the Window menu (**Figure 2.15**).
- OneNote is generally run in a single window, so most window-related commands are unnecessary. However, you can create a second instance of the main window by choosing Window > New Window or pressing **Ctrl**+**M**.

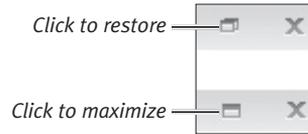


Figure 2.14 The Maximize/Restore Down button changes, depending on the window's current state.

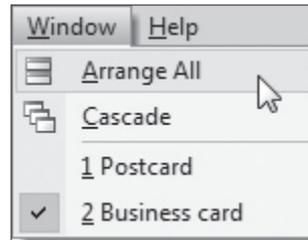


Figure 2.15 Publisher's window commands can be chosen from the Window menu.



Figure 2.16 The zoom control provides three ways for you to change the magnification.

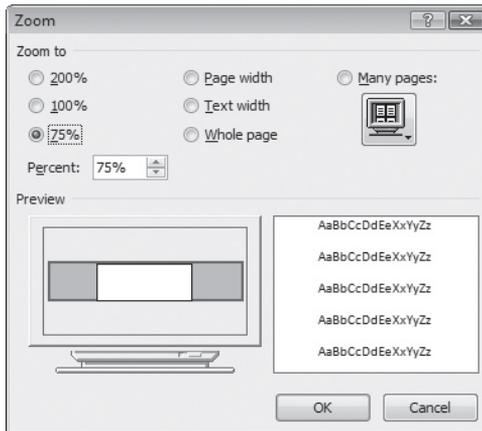


Figure 2.17 Use the Zoom dialog box to set a specific or page-related magnification. Outlook's Zoom dialog box (shown in Figure 2.18) has similar options.

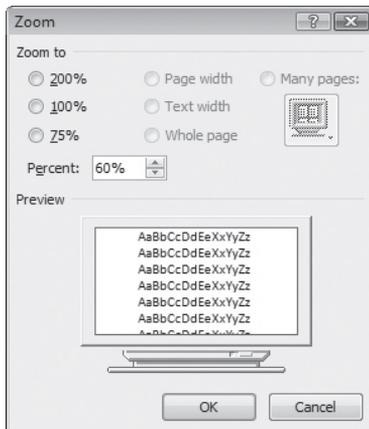


Figure 2.18 Outlook's Zoom dialog box.

✓ Tip

- You must set magnification separately for each open document in an application.

Setting the Magnification

If you're having difficulty reading a Word document because the type is too tiny or you want a bird's-eye view of a PowerPoint presentation, you can change the document window's magnification (or *zoom*).

To set the magnification in Word, Excel, or PowerPoint:

- ◆ Use the zoom control (**Figure 2.16**) in the bottom-right corner of the document or application window in any of these ways:
 - ▲ Drag the slider to a specific magnification percentage.
 - ▲ Click the – or + button to decrease or increase magnification by 10 percent.
 - ▲ Click the current zoom number to open the Zoom dialog box (**Figure 2.17**).
- ◆ In the Zoom group of the View tab, you can do either of the following:
 - ▲ Click Zoom to open the Zoom dialog box (see Figure 2.17).
 - ▲ Click 100% to zoom the document to its normal size.

To set the magnification in other Office applications:

- ◆ **Publisher.** Choose a zoom level from the View > Zoom submenu or from the Zoom drop-down menu on the toolbar, or click the Zoom Out or Zoom In toolbar icon.
- ◆ **OneNote.** Choose a magnification from the Zoom drop-down menu on the toolbar.
- ◆ **Outlook.** In the window for an existing message, choose Zoom from the Other Actions drop-down menu in the Actions group. In a message you're writing, click the Zoom icon in the Zoom group, set a magnification level in the Zoom dialog box (**Figure 2.18**), and click OK.

Using the Office Clipboard

In Windows, the *Clipboard* is an area in memory that stores the last item you copied or cut. When you paste an item, it's drawn from the Clipboard. If you copy or cut a new item, it takes the place of the current item stored in the Clipboard. Using the Clipboard, you can insert items into the current document, into a different document, or even into the documents of other applications.

While working in Office, you can continue to use the Windows Clipboard as you always have. In addition, you can use the *Office Clipboard*, a dedicated clipboard for sharing data among all open Office documents and programs. Unlike the Windows Clipboard, the Office Clipboard can store up to 24 items.

To open the Office Clipboard:

- ◆ **Word, Excel, PowerPoint.** Switch to the Home tab. In the Clipboard group, click the Clipboard dialog box launcher (**Figure 2.19**).
- ◆ **Outlook, Publisher.** Choose Edit > Office Clipboard.

The Office Clipboard appears (**Figure 2.20**).

To insert items from the Office Clipboard into a document:

1. Select the spot in the Office document where you want to paste the item(s).
2. *Do either of the following:*
 - ▲ To paste a single item, click the item in the Office Clipboard scrolling list.
 - ▲ To simultaneously paste all items stored in the Office Clipboard, click the Paste All button.

The item (or items) are added to the document.

Open the Office Clipboard

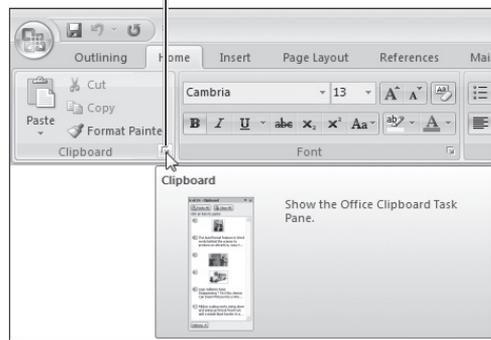


Figure 2.19 Click here to open the Office Clipboard.

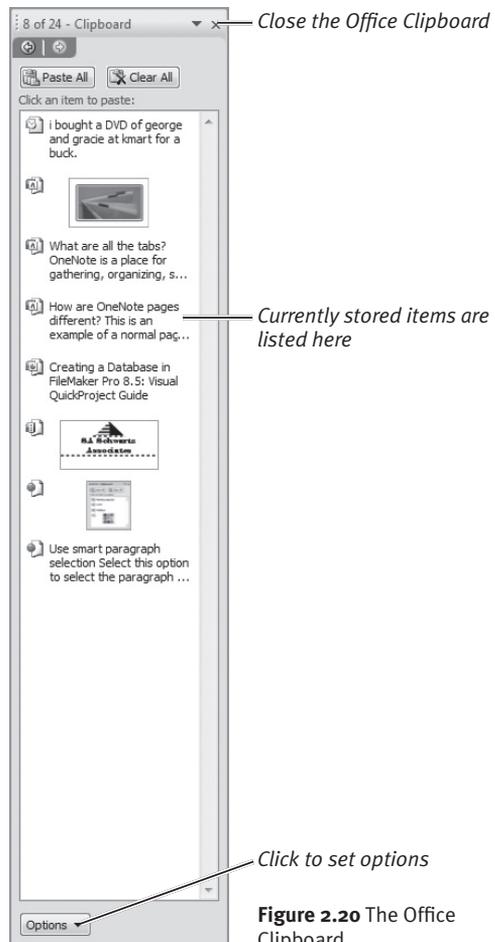


Figure 2.20 The Office Clipboard.

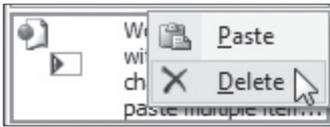


Figure 2.21 Select Delete from the drop-down menu.

To clear items from the Office Clipboard:

- ◆ *Do either of the following:*
 - ▲ To remove a single item, move the cursor over the item, click the arrow that appears, and choose Delete from the drop-down menu (**Figure 2.21**).
 - ▲ To remove all current items from the Office Clipboard, click the Clear All button (see Figure 2.20).

To close the Office Clipboard:

- ◆ *Do the following:*
 - ▲ **Word, Excel, PowerPoint.** Click the Office Clipboard's close box (X) or click the Clipboard dialog box launcher.
 - ▲ **Publisher.** Click the Office Clipboard's close box (X).
 - ▲ **Outlook.** Click the Office Clipboard's close box (X) or choose Edit > Office Clipboard.

✓ Tips

- You can't open the Office Clipboard in OneNote. However, items copied or cut in OneNote *are* added to the Office Clipboard, and they can be pasted into other Office documents.
- If you add more than 24 items to the Office Clipboard, the oldest item is automatically deleted to make room for the new item.
- Use the normal Paste command (choose Edit > Paste, click the Paste toolbar icon, or press **Ctrl+V**) to paste an item from the Windows Clipboard rather than from the Office Clipboard.
- The last item copied or cut also becomes the current item in the Windows Clipboard.
- Items remain in the Office Clipboard until you exit from all Office programs.

Printing

The process of printing a document varies little from one Office application to the next. The biggest difference lies in the options you can set. For information on application-specific Print options, refer to the appropriate chapter on that application.

You can also request an onscreen *preview* of a print job prior to sending it to the printer. Using Print Preview is an excellent way to avoid paper waste.

To print a document in Word, Excel, or PowerPoint:

1. Open the document you want to print.
2. Click the Office Button, and choose Print > Print (**Figure 2.22**).

The Print dialog box appears (**Figure 2.23**).

3. Select the destination printer from the Name drop-down list.
4. *Optional:* To set or review printer-specific settings (such as print quality), click the Properties button.
5. Set any other desired options in the Print dialog box.
6. Ensure that the printer is on and ready to print, and then click OK.

The print job is sent to the selected printer.

To print a document in Outlook, OneNote, or Publisher:

1. Open the document you want to print.

In Outlook, it's sufficient to *select* the item (such as an email message) in its list.
2. Choose File > Print.

The Print dialog box appears (refer to Figure 2.23).
3. Perform Steps 3–6 from the previous task.

The print job is sent to the selected printer.

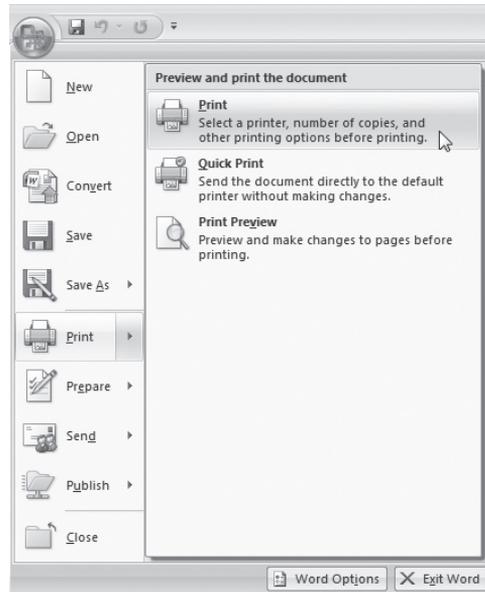


Figure 2.22 For a standard print job, choose Print from the Print submenu.

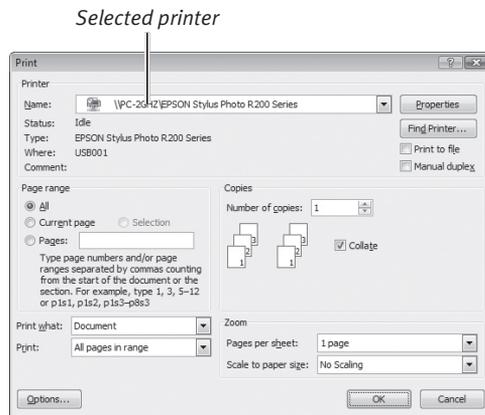


Figure 2.23 The Print dialog box presents standard print options (such as number of copies and page range), as well as program-specific options.

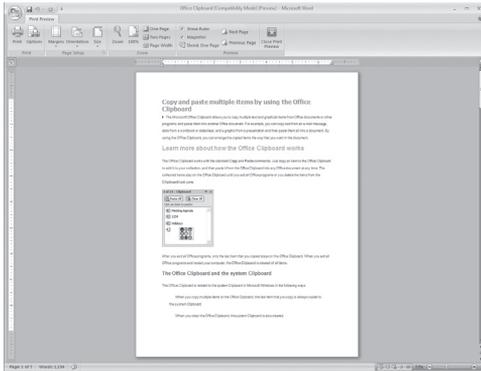


Figure 2.24 Print Preview in Word, Excel, or PowerPoint.

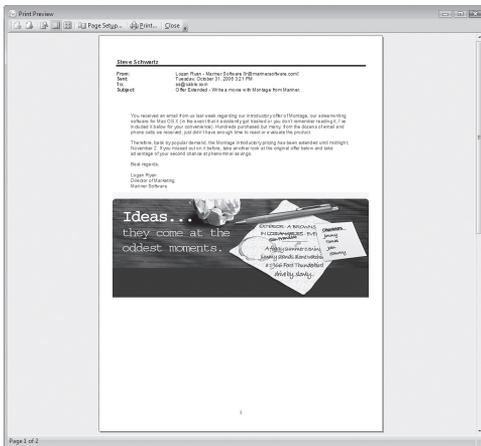


Figure 2.25 Print Preview in Outlook or Publisher.

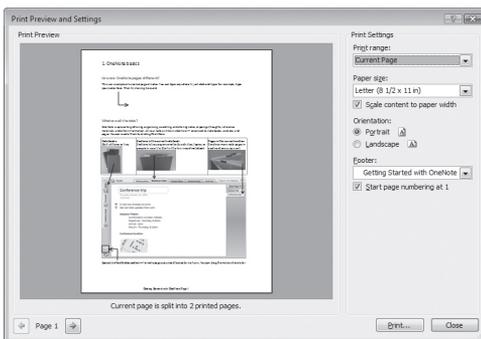


Figure 2.26 Print Preview in OneNote.

To request a print preview:

1. Open the document you want to print. In Outlook, it's sufficient to *select* the item (such as an email message) in its list.

2. *Do one of the following:*

- ▲ **Word, Excel, PowerPoint.** Click the Office Button, and choose Print > Print Preview (see Figure 2.22).

- ▲ **Outlook, OneNote, Publisher.** Choose File > Print Preview.

A Print Preview window appears, displaying the document formatted for your default printer (**Figures 2.24–2.26**).

3. Review the document.

4. *Optional:* Alter the print settings using controls in the Print Preview window.

5. *Optional:* Click the Print button to print the document as shown.

6. Click the Close button or the close box (X). The Print Preview window closes and your original document reappears.

✓ Tips

- To bypass the Print dialog box and use the default print settings, do the following:

- ▲ **Word, Excel, PowerPoint.** Click the Office Button, and choose Print > Quick Print (see Figure 2.22).

- ▲ **Outlook, OneNote, Publisher.** Click the Print toolbar icon.

- Not only can you print to a printer that's directly connected to your PC, you may also be able to print to network printers—if you're on a network and have permission to use the networked printer.

- If the desired printer isn't listed in the Print dialog box, you can install it using the Printers and Faxes (XP) or Printers (Vista) control panel.

Getting Help

Office applications can draw help information from Help files stored on your computer, as well as from Office Online (using an active Internet connection). Simple help is provided by means of *ToolTips*, tiny pop-up windows.

To view a ToolTip:

- ◆ Rest the cursor over a command or control. A ToolTip (including a keyboard shortcut, if there is one) appears (**Figures 2.27–2.28**).

To get help with an Office application:

- ◆ *Do one of the following:*
 - ▲ **Word, Excel, PowerPoint.** Click the Microsoft Office Help icon (**Figure 2.29**) or press **F1**.
 - ▲ **Outlook, Publisher.** Choose Help > Microsoft Office *program name* Help, click the Microsoft Office *program name* Help toolbar icon, type a text string in the Help search box (**Figure 2.30**), or press **F1**.
 - ▲ **OneNote.** Choose Help > Microsoft Office OneNote Help or press **F1**.
- A Help window appears (**Figure 2.31**).

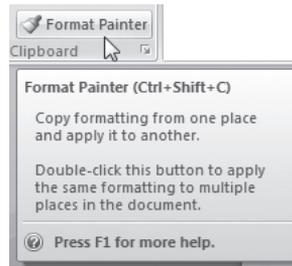


Figure 2.27 ToolTips in Word, Excel, and PowerPoint often provide extensive information.

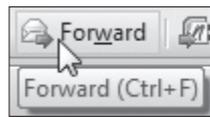


Figure 2.28 ToolTips in the other Office applications are more terse.



Figure 2.29 Summon help in Word, Excel, or PowerPoint by clicking this icon.



Figure 2.30 In Outlook or Publisher, you can request help on a specific topic by entering a search string in this box.



Figure 2.31 An Office Help window.

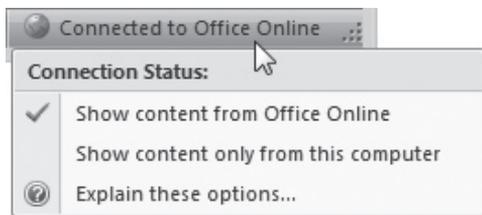


Figure 2.32 Click the text in the corner of the Help window to choose help text to use.

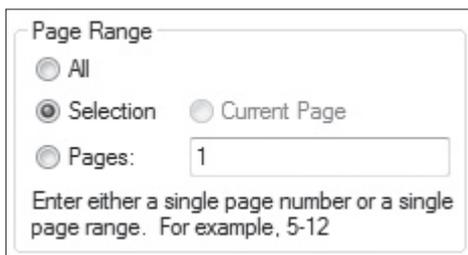


Figure 2.33 You can also print selected text from a Help topic.

To work in an Office Help window:

1. Do any of the following:

- ▲ To view the main Help page, click the Home (house) icon at the top of the Help window.
- ▲ To display/hide Help's content list, click the Table of Contents (book) icon.
- ▲ To read information on a topic, click its blue *link text*. (When you move the cursor over link text, an underline appears beneath the text.)
- ▲ To search Help for a particular topic, type search text in the box and click the Search icon.
- ▲ To go backward or forward among pages you've viewed, click the Back or Forward icon.
- ▲ To print the current help topic, click the Print (printer) icon.
- ▲ To switch between offline and online help information, click the drop-down menu in the lower-right corner of the Help window (Figure 2.32) and choose an option.

2. When you're done using Help, click the Help window's close box (X).

✓ Tips

- You can copy help text and paste it into other documents, such as those of Word or OneNote. Select the text (including images, if you like) and press **Ctrl+C**. The selected material is copied to the system Clipboard. If the Office Clipboard is active, it's also stored there.
- To print a partial Help topic, select the desired text and click the Print icon. In the Print dialog box, set Page Range to Selection (Figure 2.33), and click OK.

Quitting an Office Program

As when working with other Windows programs, when you're done using an Office application, you *exit* from it.

To quit an Office application:

1. Do one of the following:
 - ▲ **Word, Excel, PowerPoint.** Click the Office Button, and then click Exit *program name* (**Figure 2.34**).
 - ▲ **Outlook, Publisher, OneNote.** Choose File > Exit.
 - ▲ **Any Office program.** Press **Alt** **F4**.
2. If an open document contains unsaved changes, a dialog box appears (**Figure 2.35**). Otherwise, the program quits immediately.



Figure 2.34 Click the Exit button to quit from Word, Excel, or PowerPoint.

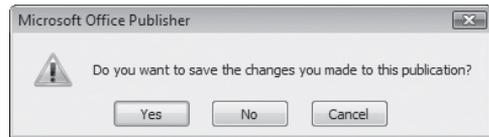


Figure 2.35 When you exit from a program, you get an opportunity to save any edited documents.

Setting Application Preferences

Although the default behaviors of most commands and procedures are designed to meet the needs of most users, you can customize the way any Office application operates.

- ◆ **Word, Excel, PowerPoint.** Click the Office Button, followed by the *program* Options button.
- ◆ **Outlook, Publisher, OneNote.** Choose Tools > Options.