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CHAPTER 4

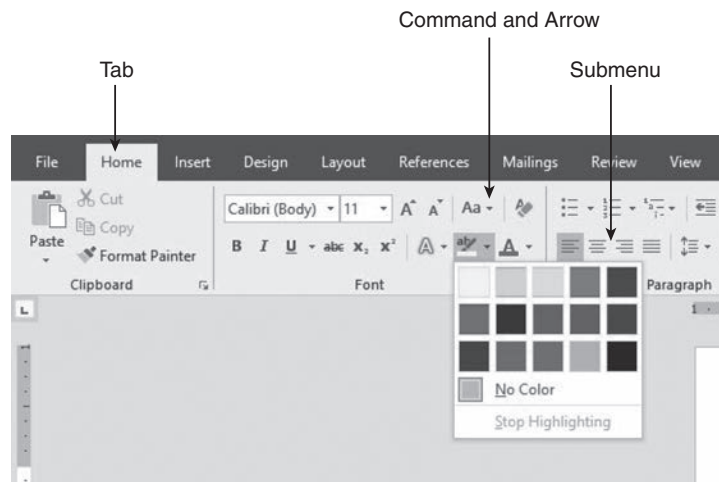
Software Applications: Common Tasks

OBJECTIVES

1. Manipulate the Microsoft Office ribbon, tabs, groups, and commands.
2. Perform common tasks such as opening, creating, closing, saving, finding, and printing files.
3. Explore differences in Microsoft Office Applications when using a Windows based personal computer (PC), iPad, and iPhone.
4. Describe and use online and embedded application Help services.
5. Use cut/copy/paste functions to move or copy data within the same file or from one file to another.
6. Use the cloud as a common storage site when collaborating on documents created and modified using Microsoft Office Applications.

► Introduction

The focus of this chapter is to describe common tasks used when working with productivity *application programs*. In the Windows environment certain interface design standards exist so that several applications can share a common interface environment. For example, the *ribbon* provides the paths to action. Commands on a ribbon that are followed by a downward pointing arrow, when clicked, result in the appearance of a submenu of related commands (see **FIGURE 4-1**). Office applications display a *ribbon* (previously referred to as menus), *title bar*, *quick access toolbar*, *status bar*, and graphical buttons (commands). Microsoft Office Applications continue to fine-tune previous Office versions with the goal of providing the appropriate tools at the point of need. This chapter uses Microsoft Office suite of applications on a Windows 10 computer to explain and demonstrate selected features and functions common in the Office suite.



*NOTE: The only difference between Office 2019 and Office 365 here is the tabs are not colored and the words are not next to the cut, copy and format in office 2019.

FIGURE 4-1 Ribbon, Tab, Commands, and Submenu

Used with permission from Microsoft.

► Common Layout

Microsoft Office 2019/365 improves on previous Office versions such as Office 2007 to 2016. When an application is opened in Office a window appears with a navigational pane on the left displaying a list of files recently saved or opened and a navigational pane on the right displaying a variety of templates. Once you select a template or open a file, the ribbon or menu tabs become visible. The tile bar and tabs continue to appear the same as in previous versions. The title bars are blue in Word, green in Excel, and orange in PowerPoint. When you click the **File** tab, then **Info**, the **Backstage view** of the document appears. Backstage view helps you work “with your document” whereas the ribbon or menu helps you work “in your document.” The File tab continues to provide access to document functions such as open, save, close, print, options, and share. Additional functions provided on the File tab include the ability to offer feedback to Microsoft, to obtain information on your account, to export the document into a different format, and to save as an Adobe PDF file. **FIGURE 4-2** shows the Backstage view in Word, Excel, and PowerPoint. Notice the pane on left side of each applications’ backstage view matches the color of each applications’ title bar. The Info section allows further functionality to protect, inspect, and manage the application such as file management, password protection, sharing, versions, properties, and author, which display by default when selecting Info on the File tab.

Title Bar

When an application is opened, the Title bar appears at the top of the window. In the center of the Title bar is the name of the file and the program used to create it. By default, the file name is document1, book1, or presentation1 for Word, Excel, and PowerPoint, respectively. In the upper left corner of the Title bar is the **Quick Access Toolbar (QAT)**, which remains visible regardless of tab selected. The standard items on the QAT usually include Autosave, Save, Undo, Redo, and Customize (see **FIGURE 4-3**). Email and Quick Print have been added to the Word QAT using the customize QAT function. Desktop computers generally don’t have autosave or touch/mouse mode commands. To customize the QAT, click the **downward arrow**; a menu appears with other commands (e.g., touch/mouse mode commands) as well as a submenu that offers more commands. The QAT can also be moved below the ribbon. When computers are installed in labs and other public settings you may not be allowed to alter this toolbar.

To the upper right corner of the title bar is the name of the author and window manipulation options. Here you can select ribbon display options such as auto hide the ribbon, show tabs only, or show tabs and commands and adjust the size of the window. The window can be minimized, maximized, restored, or closed (see Figure 4-3).

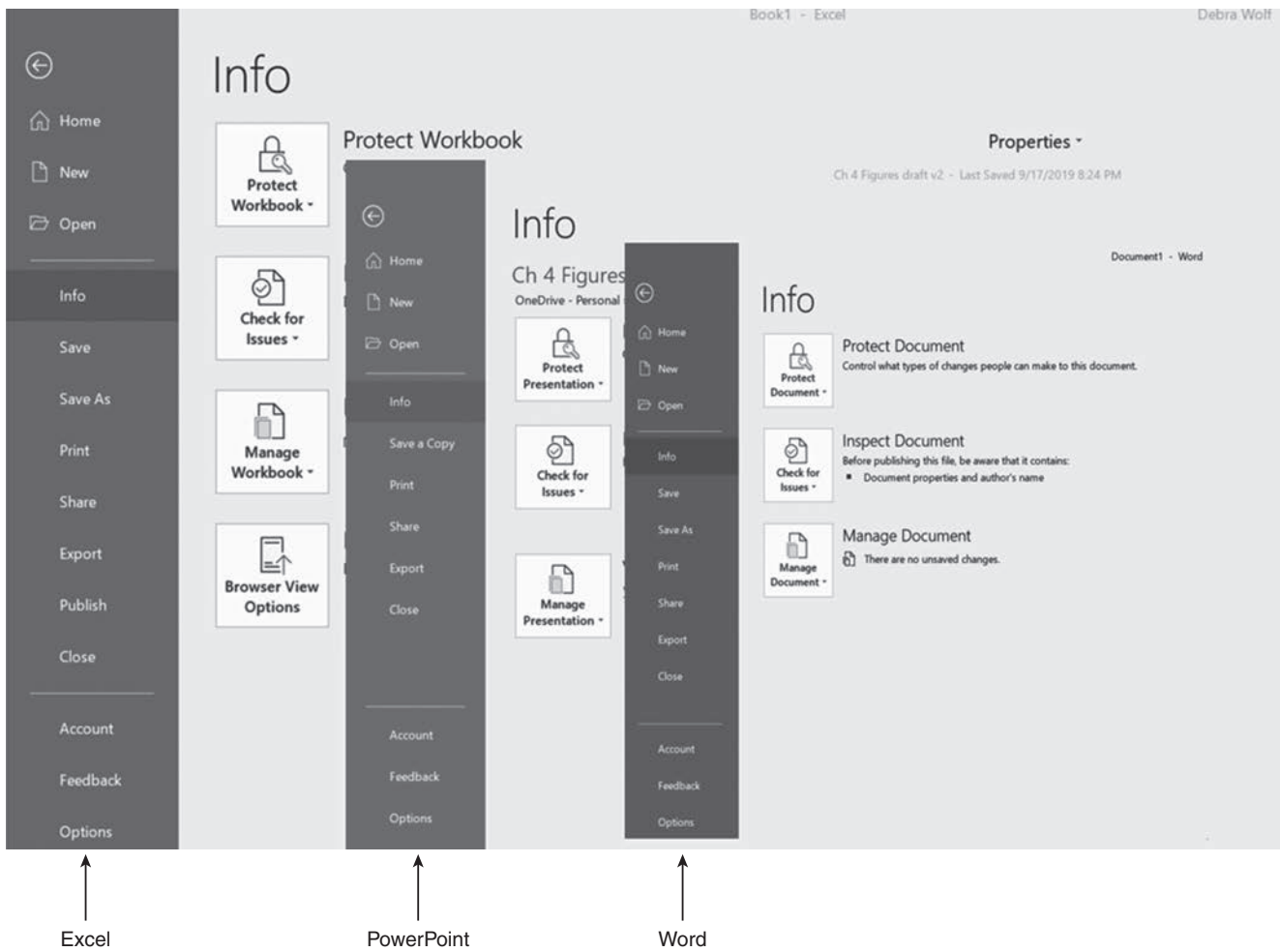


FIGURE 4-2 File Menu, Backstage View

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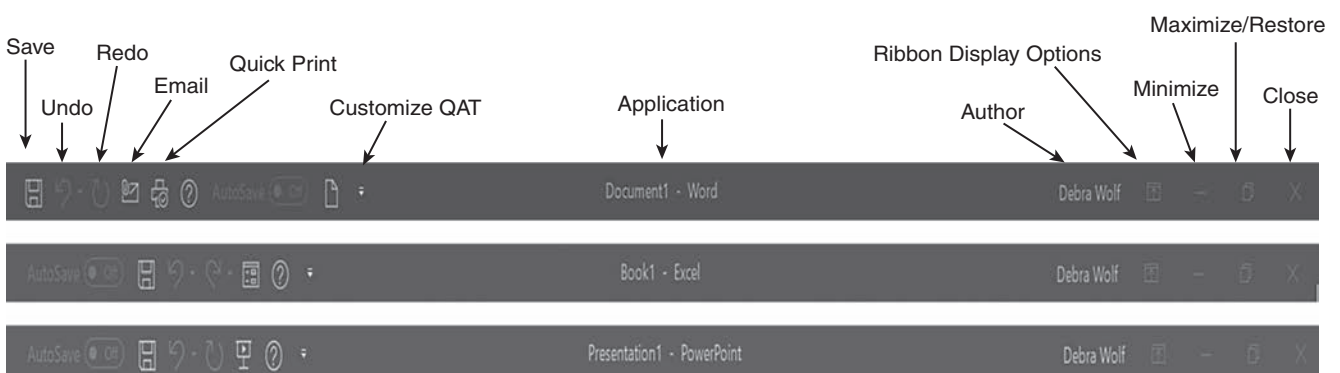


FIGURE 4-3 Sample Quick Access Toolbar and Title Bars of Office Applications

Used with permission from Microsoft.

Ribbon

The *ribbon* is composed of task-oriented tabs, groups, and commands. The most commonly used commands associated with a certain task are visible in each application's ribbon. **FIGURE 4-4** shows the ribbons for Word, Excel, and PowerPoint with common features identified.

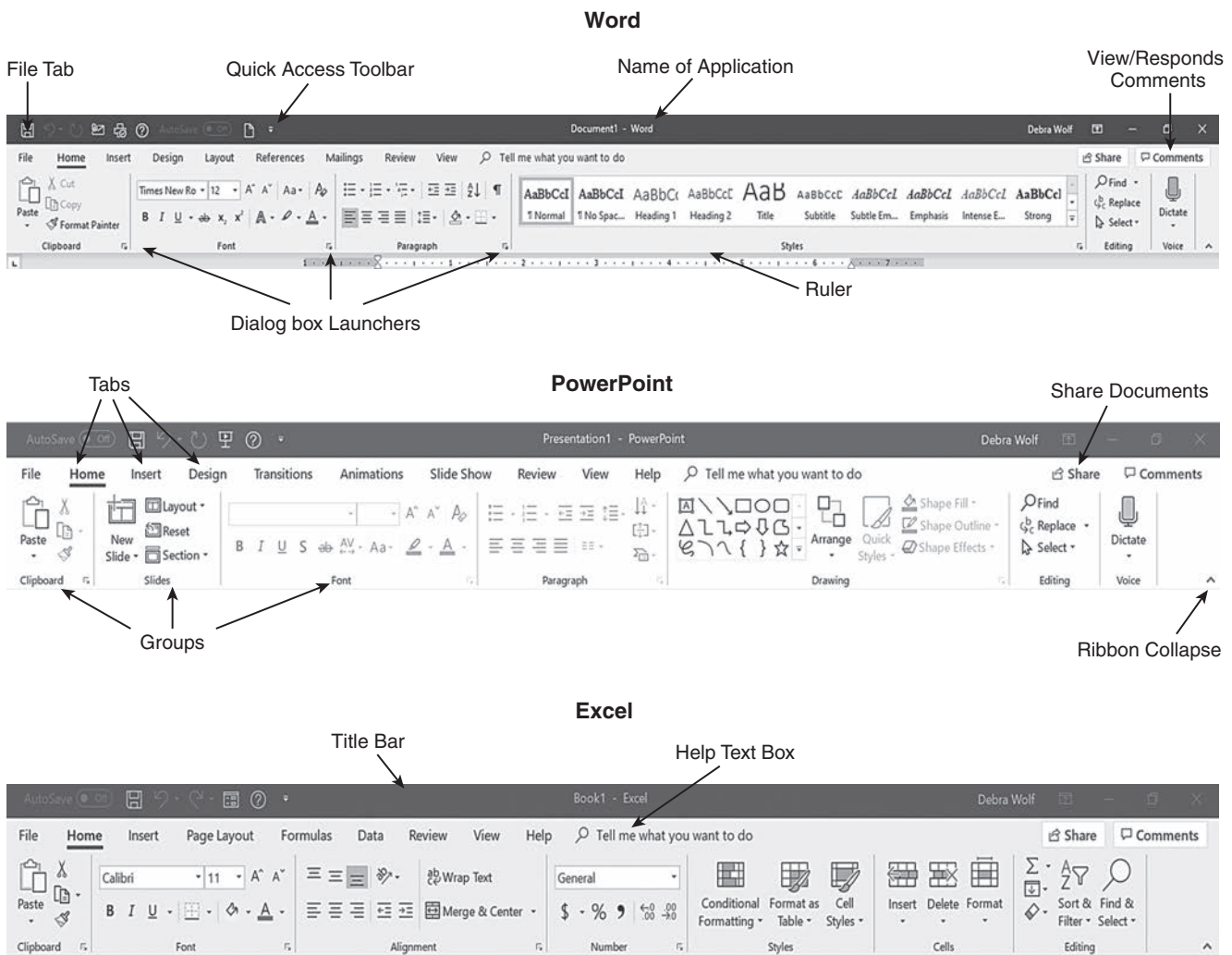



FIGURE 4-4 Sample Ribbons of Office Applications

Used with permission from Microsoft.

Tabs, Groups, and Commands

Basic task-oriented tabs appear across the top of the ribbon. Tabs vary among applications, but most applications share the following tabs: File, Home, Insert, Review, and View. Tabs like Home and View are always available, regardless of which tab is opened. Tabs are further broken into subsections called groups that further define the tasks associated with that group (see Figure 4-4). When clicking a tab, the ribbon changes to show tasks or commands associated with that tab. For example, within Word and PowerPoint, when selecting the Insert tab, you will be able to insert pictures, cover pages, symbols, tables, equations, headers, and footers in a document. Within Excel, the Insert tab offers subcommands to insert pivot tables, maps, and charts. These are just a few examples of items you can insert into an application by clicking on the Insert tab.

The **Dialog Box Launcher**  in a group when clicked opens a dialog box in which further options are available (see **FIGURE 4-5**). When a down arrow appears in a ribbon command (also called a mouse or more arrow) it means more choices are available. When the cursor is held over the mouse arrow in the ribbon, a ScreenTip appears that describes its function. When the arrow is clicked, a task pane appears. A **task pane** is a small window that displays additional options and commands for certain features, whereas a **contextual tab** occurs in a window that is only available in a certain context or situation.

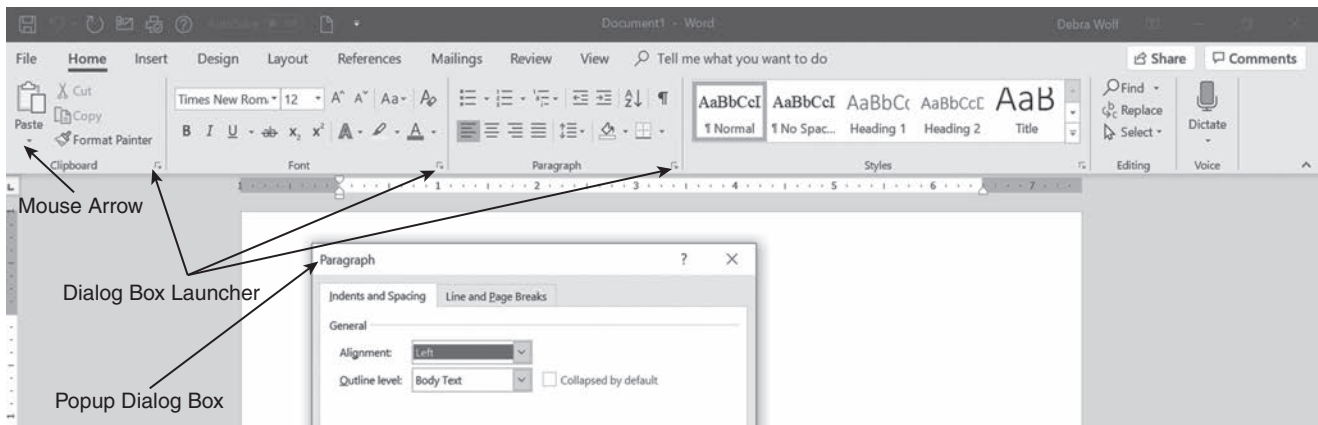


FIGURE 4-5 Dialog Box Launcher With Dialog Box Opened and Mouse Arrow

Used with permission from Microsoft.

The File Tab

FIGURE 4-6 displays the menu of options on the File tab and related commands that appear when the **New** option is selected. The options are described in more detail below using Word as an example. The menu and options are similar for PowerPoint and Excel applications.

Info	The Info command presents ways to protect, inspect, and manage your document. Additional information is provided such as the document's properties and dates the document was created or modified or last printed. It will also display a computer-assigned author name. Depending on how the PC has been configured this could be the name of the person who created or modified the document.
New	You can open a new blank document or choose from a large selection of templates including American Psychological Association (APA) style report, blog post, brochure, calendar, envelopes, letterhead, memo, minutes, resume and curriculum vitae (CV), schedule, return labels, and newsletters (see Figure 4-6).
Open	Open allows you to select from a list of previously saved documents that appear on the far-right side of the window. In the center of the window is a list of locations you can click to open and look in other areas of the computer or storage devices for a file such as This PC and Browse. Included in this list is OneDrive and a section titled "Shared with Me" where documents that were shared with you will appear.
Save	Save is used when saving a file for the first time. By default, you will automatically be advanced to the "Save As" command. Here you are asked to name the file and choose the location in which to save it. You can add a tag or specify its subject. If the file was already saved, by clicking Save , it will default to the original location where the file was previously saved.
Save As	Selecting Save As brings up a window similar to that for Save. If the file has been saved before, you can rename it and select a new place where the file should be saved or change its file format. Options for places to save files include Recent (referring to recent folders, databases opened), OneDrive, This PC, Add a place (such as Office 365 SharePoint or additional OneDrive locations), or Browse (which opens locations on that computer's hard drive). Using a consistent approach to where files are saved will be a significant advantage in the future when you want to retrieve a file.
Print	When Print is selected, you are provided a list of options, which includes the printer to print to and the number of copies needed. Under settings, several selections are available such as what pages to print, printing on one side or two, if collated pages are needed, orientation (portrait or landscape), and page setup.

Share	Office has the option to Share a file with someone. When clicked, a dialog box appears the right side of the screen with a text box to insert an email address or to access the computer’s address book. At the bottom of the dialog box are options to send the file as an attachment or to get a sharing link to send to the person you want to share with. Based on the Office software program you installed and the device you are using, a different screen may appear when Share is clicked. For example, a dialog box may appear asking specifically how you would like to share the document such as Share with people , via Email , as Adobe PDF , to Present Online , or as a Post to a Blog . When one of these items is clicked, additional options appear to the far right of the screen offering additional directions and options.
Export	Export is a new function in Office that allows the file to be converted to a PDF/XPS document or some other file type.
Close	When you select Close , if you haven’t saved the document previously a dialog box will open that will prompt you to choose Save, Don’t Save, or Cancel. In order to close, you are required to select an option.
Account	This section of the File tab provides access to the user information in order to allow a photo to be uploaded, to update personal information, to sign out, or to switch accounts. Additional options include changing the background wallpaper of the applications to include images such as stars or clouds and to select a color theme. On this page you can also find product information regarding the Microsoft Office suite including updates and more information about Word, Excel, or PowerPoint and to see the most recently installed application updates.
Feedback	Feedback allows users to send feedback directly to Microsoft on whether they “Liked or did not like something” or to send suggestions for a new feature or type of improvement. By clicking any of the options, a dialog box appears allowing you to add a message, a screenshot of the issue, or an email address for further communication. Finally, a submit button is provided to send information.
Options	Choosing Options opens a dialog box with a list of functionality choices such as “General” allowing personalizing, interface options, intelligent services, LinkedIn features, startup, and real-time collaboration options. Other functionalities that appear include Display, Proofing, Save, Language, Ease of access, Advanced, Customized Ribbon, QAT, Add-ins, and Trust Center. Each function provides a full list of additional choices similar to General option noted above. Take some time to explore these options to personalize how you use the Office application. For example, the Proofing option allows selection of a variety of autocorrect options involving spelling and grammar. NOTE: You may not “customize” software in computer labs or public places.

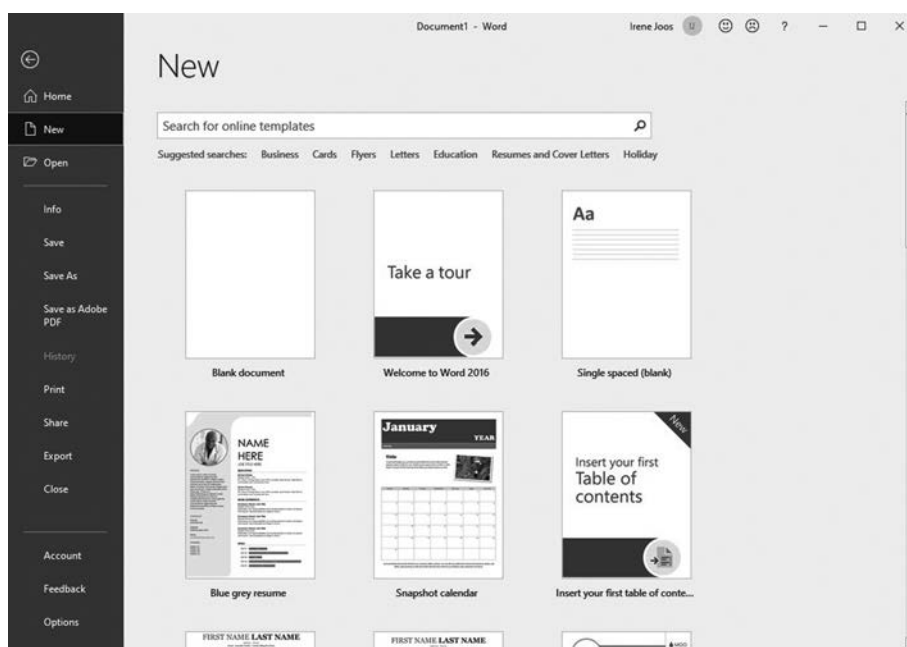




FIGURE 4-6 File Tab Menu in Word—New Document Selected

Used with permission from Microsoft.

Help

On the ribbon, at the end of the tabs, a lightbulb  or magnifying glass  can be found, followed by “Tell me what you want to do.” This icon indicates where the Help text box is located. This Help dialog box is found in Word, Excel, and PowerPoint. **FIGURE 4-7** shows the submenus that appear when you click in the text box in Word and PowerPoint. Once you type a key word in the box, a submenu dialog box appears with a Table of Contents. The submenu changes based on the key word that you type. At the bottom of each Table of Contents are two subcommands titled “Get Help on ...” and “Smart Lookup on ...,” each offering additional direction to seek help based on the key word or phrase used. Some items that appear in the submenu dialog box offer arrows that lead to additional submenu options. Type a keyword or topic in the text box and click one of the submenu items that appear in the dialog box.

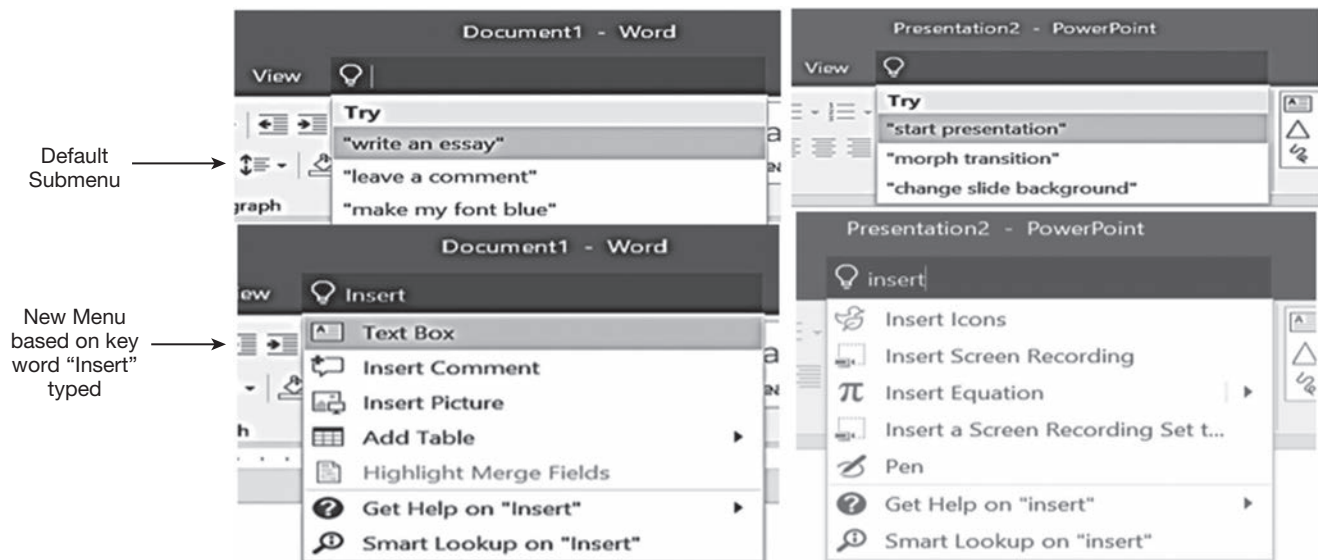


FIGURE 4-7 Help Text Box Sample Submenus for Word and PowerPoint
Used with permission from Microsoft.

The Status Bar

FIGURE 4-8 shows the *Status Bar* in Word, with enlarged images inserted to clearly depict content. To the far left of the Status Bar the page number, number of words in the document, and error icon (book with a check mark indicating no errors or an X indicating an error) display. At the far right of the bar are three view icons (Read Mode, Print Layout, and Web Layout) and the Zoom slider. **Zoom** allows you to examine a part of the document more closely or to see the complete page of the document. Setting the Zoom to page width can be helpful when working with a document in the landscape mode. Right-click on the **status bar** and a menu opens that allows you to customize the bar to add features such as line numbers or character count.

► Office Application Layouts for iPhone and iPad

Office software provides the flexibility of using the applications on other devices such as iPhones and iPads. Unfortunately, the common layouts introduced above are not consistent when using the applications on an iPhone or iPad. Office 365 apps provide the opportunity to use the applications on operating systems such as Android and iOS. The Office mobile apps are free for download. The mobile and iPad apps layout looks similar to the common layouts outlined above and are intuitive to use. The apps provide access to files stored in any cloud-based service, making viewing and editing more feasible from various locations and devices. **FIGURE 4-9** illustrates the layout on an iPhone for Word application.

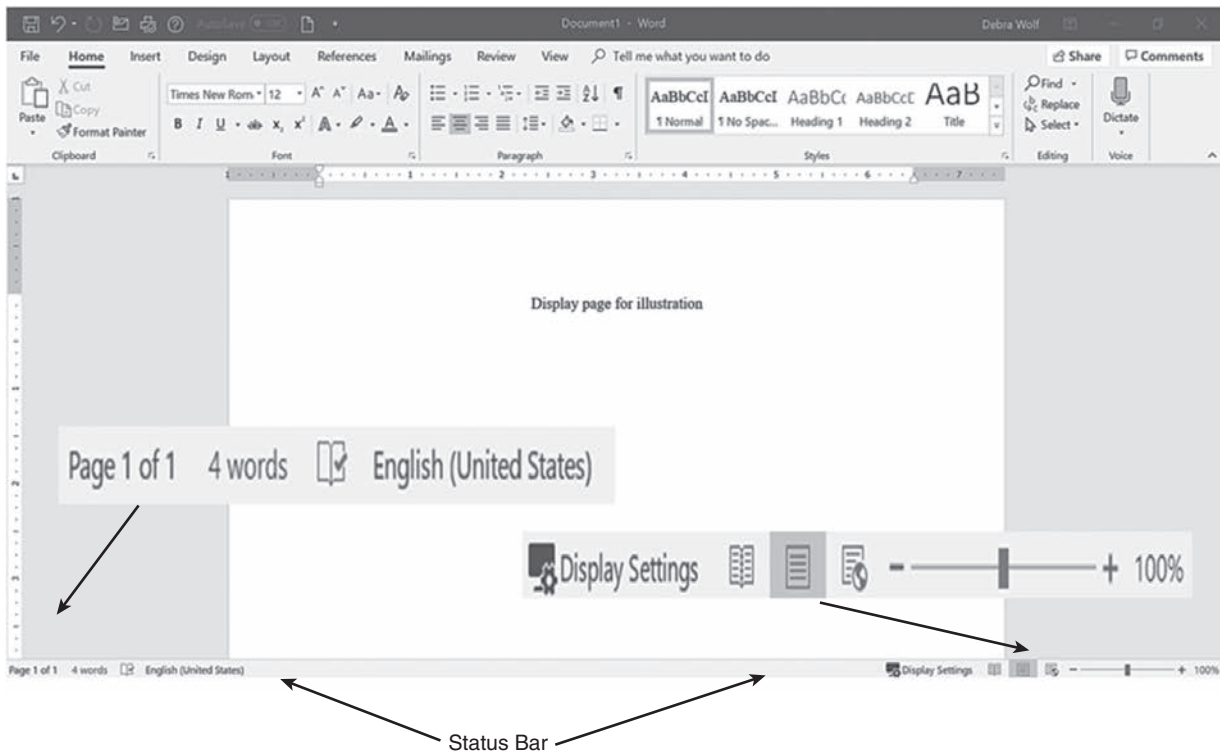


FIGURE 4-8 Status Bar in Word

Used with permission from Microsoft.

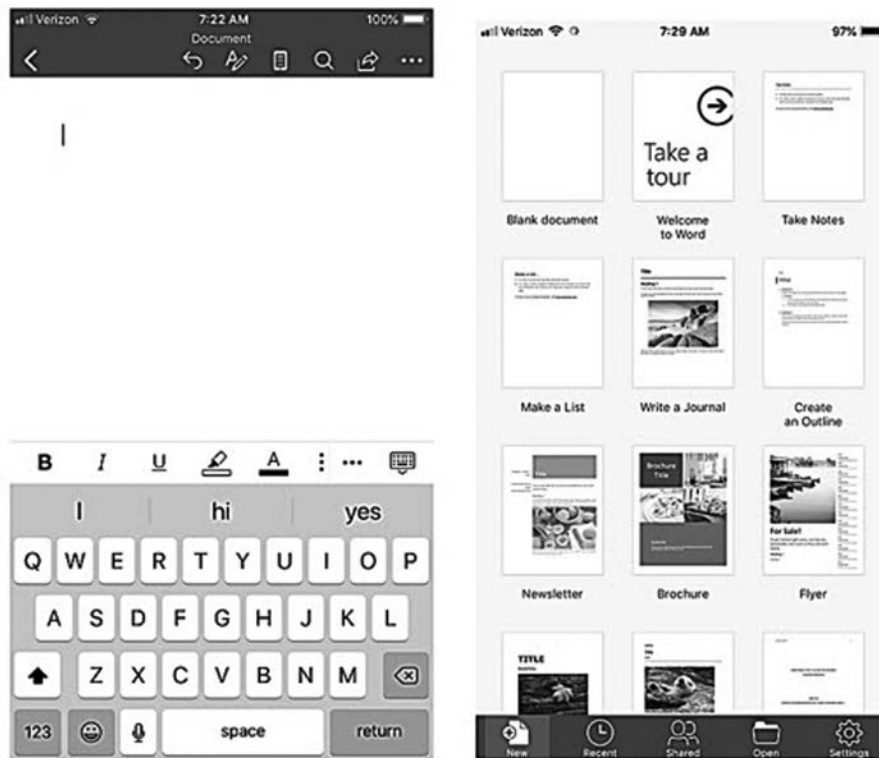


FIGURE 4-9 Word Application Layout on iPhone


Used with permission from Microsoft.

► Common Tasks

Regardless of the Office application, certain basic tasks are used regularly. This section describes some of the most common tasks you may want to use with Office applications.

Obtaining Help

One of the more common tasks used when working in Office applications is seeking *help*. In Office, the *Help feature* can be accessed in several ways. As mentioned earlier in this chapter and illustrated in Figure 4-7, typing a key word or phrase in the “Tell me what you want to do” text box will provide resources to help answer your question(s). You can quickly access this text box by pressing **Alt+Q**. To access Help via the text box, type a key word or phrase (such as “change font”) in the “Tell me what you want to do box”:

1. When the pop-up menu appears, click the **Get Help** icon  next to “Get help on change fonts.”
2. When a submenu appears, select the **Change the font size** option.
3. A new task pane opens to the right of the document with several levels of instructions on how to change fonts.
4. If the information was not helpful, click in the search help box that appears at the top of the pane and try again using similar key words (see **FIGURE 4-10**).

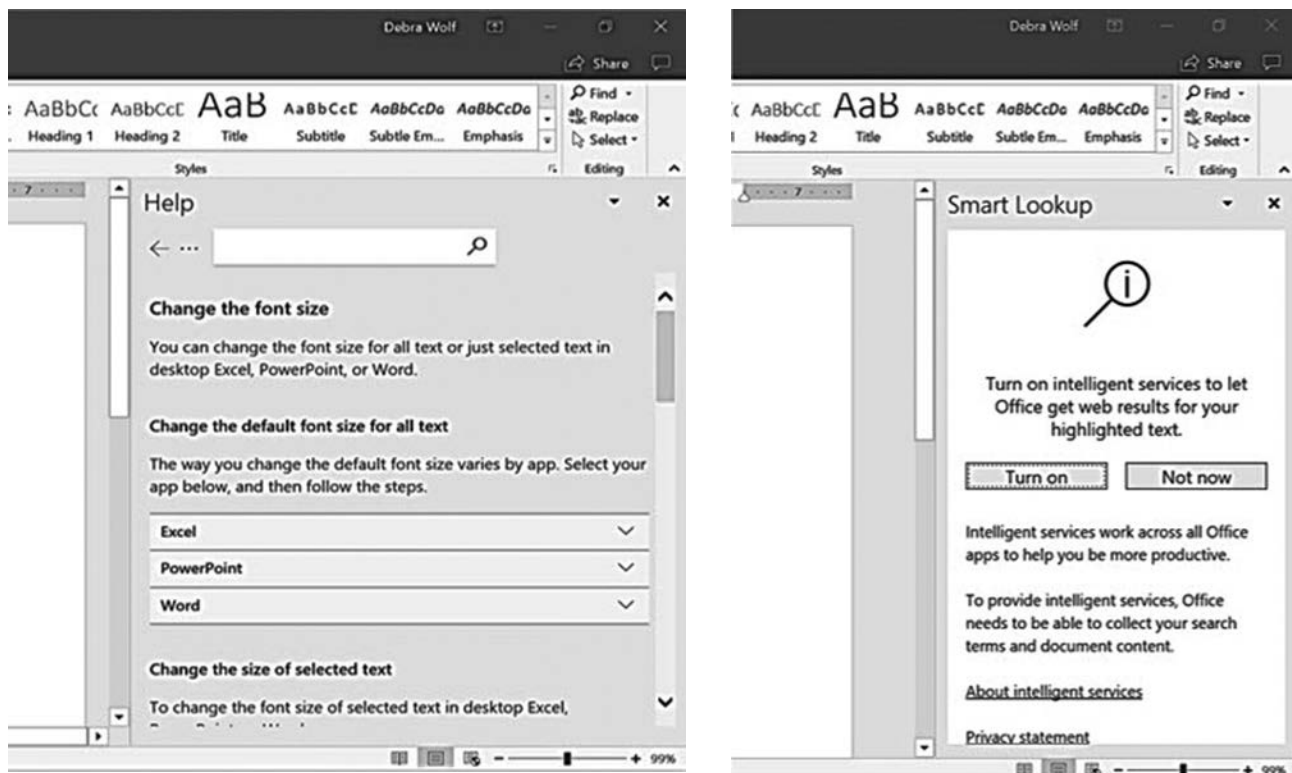



FIGURE 4-10 Get Help and Smart Lookup Dialog Box


Used with permission from Microsoft.

To access additional help, you can use Microsoft’s “Smart Lookup Intelligent Services:

1. Type a key word or phrase (such as “**change fonts**”) in the “Tell me what you want to do box.”
2. When the pop-up menu appears, this time, click **Smart Lookup on change fonts** option.
3. A new task pane opens to the right of the document requiring you to turn this functionality on (if using for the first time).

- By selecting “**Turn on,**” you are allowing the system to use your text and document content to search the web for additional information to help address your question or topic (see Figure 4-10). When Smart Lookup functionality is turned on, brief information from the web is shared in the dialog box along with active links for more information.

To access additional help, you can add the Get Help icon  to your **QAT**. By doing so you have quick access to frequently asked content areas such as formatting text, saving, printing, sharing, and editing. In addition, you are provided links to Microsoft’s online training and Community center:

- Click the **File** tab, then **Options**, then **Quick Access Toolbar**.
- In the dialog box, select **All Commands** from the “Choose commands from” drop-down menu.
- Select **Help** from the list and **Add** to the right-side box, then click **OK**. You will now see the circular icon with a question mark  located in your QAT (see **FIGURE 4-11**).
- Repeat these steps for each Microsoft application if you want the Get help icon to appear in the QAT.

NOTE: You can also access the Windows 10 “Getting started/How to get help in Windows 10” page by pressing only **F1** or **Fn + F1** keys simultaneously, depending on your operating system.

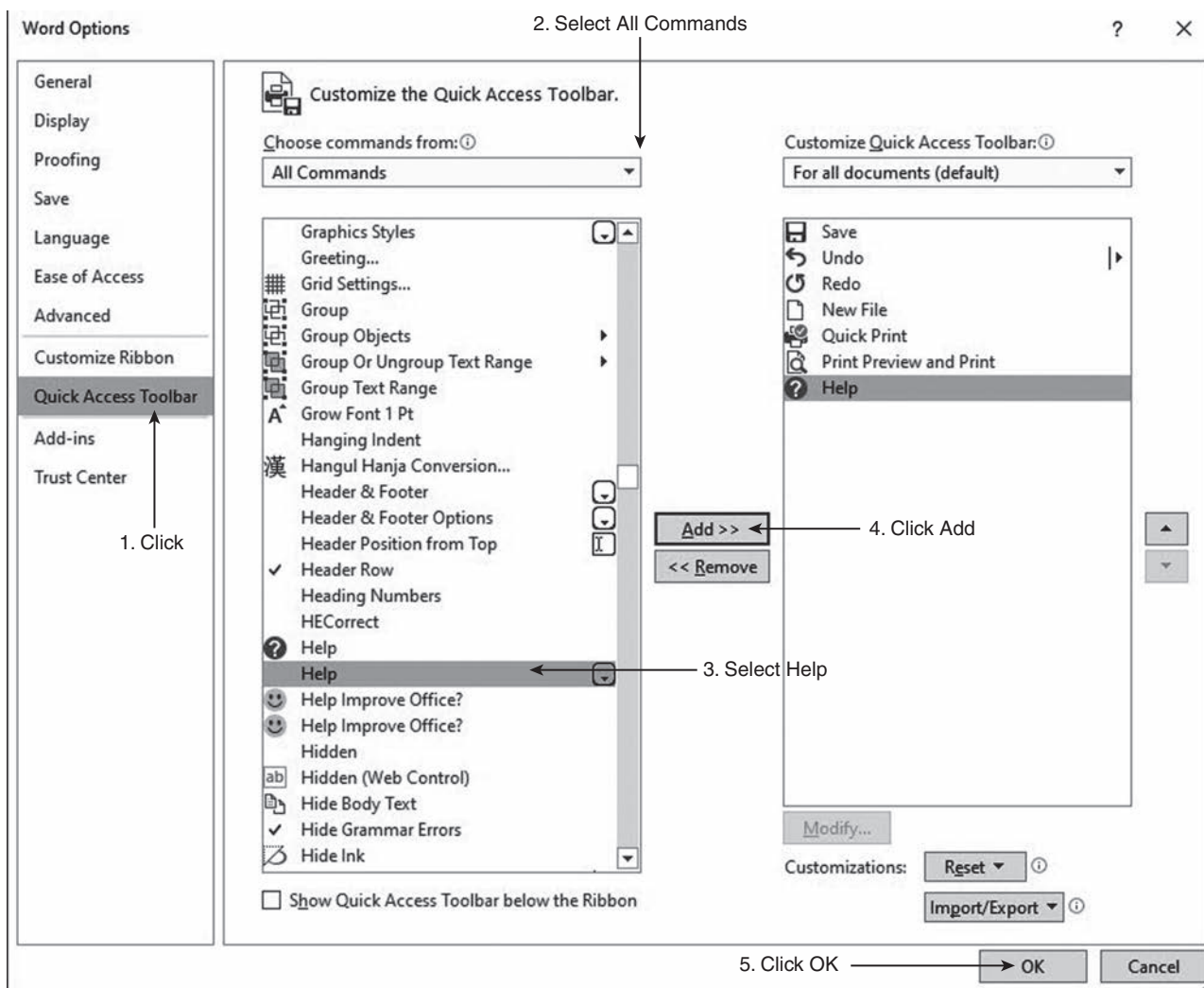



FIGURE 4-11 Adding Help to Quick Access Toolbar

Used with permission from Microsoft.

Help is also accessible when the File tab is opened. On the far right of the File tab title bar, after the author's name, a question mark can be seen. Click the **question mark**  and you will be taken to Microsoft's support webpage where additional information and hyperlinks are located to learn more about change file properties or using a password to protect documents.

The final way to seek help when working in Microsoft Office applications is to visit Microsoft's Support webpage. The website offers help and training with all office products:

1. Go to <https://support.office.com>.
2. Click the **Training** tab.
3. Click the **application** you need help with (such as Word).
4. Click the **box** that best illustrates your needs (such as "Write and Edit").

Each box, when opened, contains a unique detailed list of specific topics related to "Write and Edit" to choose from. Each specific topic has a short video to watch and written directions. At the bottom of the page are additional links for more information (see **FIGURE 4-12**).

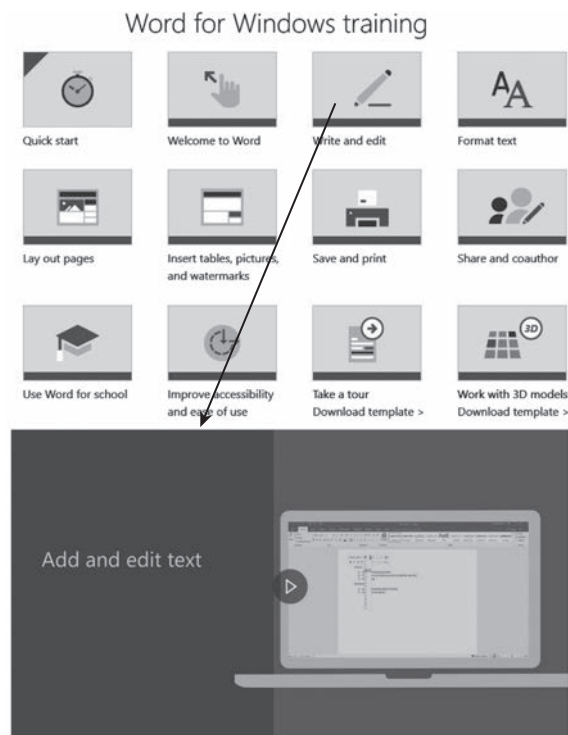




FIGURE 4-12 Microsoft Support Office.com

Used with permission from Microsoft.

Creating a New Document

To create a new Word document, Excel workbook, or PowerPoint presentation, you must first open the software application. There are three simple ways to open the applications.

1. Click the **Start icon**  located on bottom left corner of taskbar or the **Windows logo key**  located on the keyboard. When you click the **Start icon** or press the **Windows logo key**, a pop-up list of applications appears in alphabetical order. Depending on how Windows is set up on your computer, you might need to first click **All apps** to get to this screen. Using the scroll bar, you can move up and

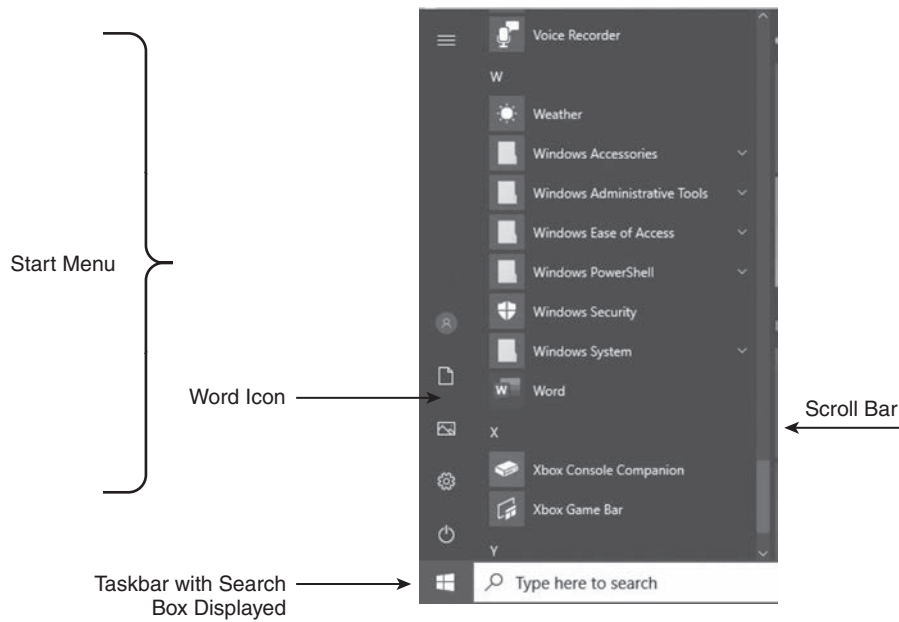


FIGURE 4-13 Start Menu, Applications, Scroll Bar

Used with permission from Microsoft.

down the list to find the application (such as Word) you are looking for (see **FIGURE 4-13**). To see the scroll bar, you may need to hover to the right of application names with your cursor. By clicking the Word icon, you open the application.

2. On the desktop, click the **Office application icon** you want to open (see **FIGURE 4-14**). If the icons are not present on your desktop, you can follow steps noted in the preceding item 1, click the **application**

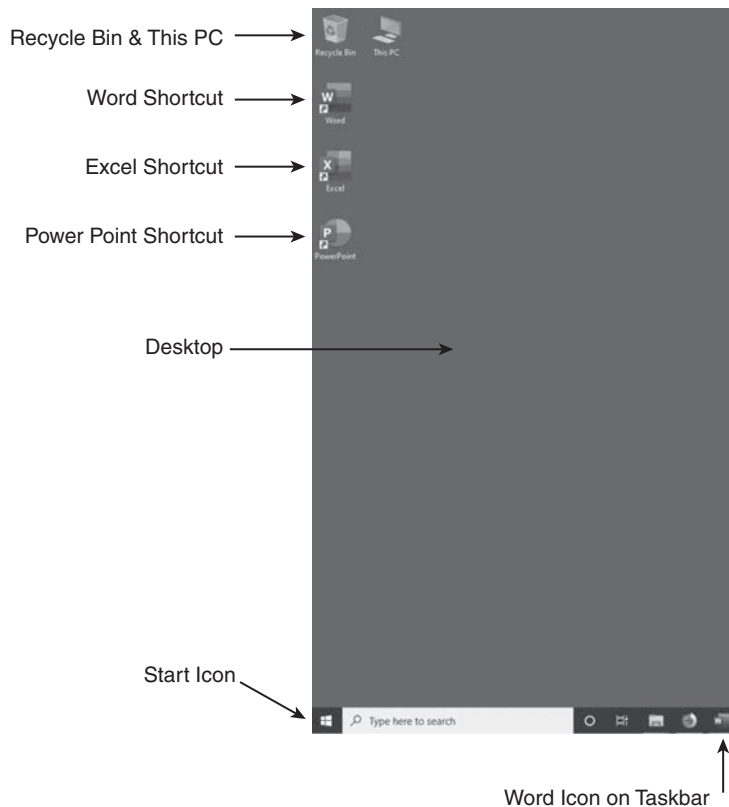
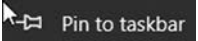


FIGURE 4-14 Desktop With Office Applications and Taskbar Displayed

Used with permission from Microsoft.

you want to open, and hold down the **mouse button** (do not release the mouse button). Drag the icon to your desktop and release.

3. Click the **Office application icon** found on your taskbar located at bottom of the screen. If the icons are not present on the taskbar, you can follow steps noted above, click the application icon but don't lift your finger, and then hold and drag the icon to the taskbar. You can also right-click on the icon and select **Pin to Taskbar**  .

To start working in most applications, you must first create a new document, spreadsheet, or presentation. Most applications open allowing the user to select a new blank document, spreadsheet, or presentation or to select one from a series of templates provided by Microsoft. Each application also offers a search box to search for additional online templates not listed on the page. When a blank presentation is selected in PowerPoint, the application opens to a blank title slide. In Excel, when a blank workbook is opened, a blank worksheet appears. In this chapter the term “document” is used to represent a word document, an Excel spreadsheet, or a PowerPoint presentation.

Several **templates** can be used to minimize formatting time in Word, Excel, and PowerPoint. Templates are either installed on the computer, made from previously constructed documents, or available online.

To Create a Document Using a Template:

1. Click the **File** tab and choose **New**.
2. Click the **Sample Template** you are interested in using.
3. A pop-up box will appear displaying the name of the template and information describing the template. Now, click the **Create** button. You can also just double-click the template and it will open.
4. The selected template will open to full screen for further formatting or editing.

If additional template selection is needed, use the search box located above the displayed templates. Type a **key word** or **topic** into the box and click **Enter**.

Saving Documents

Once editing begins on a document, it will need to be saved for future reference or revision. Best practice is to name and save your document when first opened. Thereafter you can simply press the **Save** icon located on upper left corner of the QAT, press **Ctrl+S** (S stands for Save), or click the **File tab**, then **Save**. The first time the document is being saved, a location and name must be specified (see Chapter 3 for file naming conventions). If a location is not specified, the file is saved in a default location. In Office, the default location can vary based on how that computer was set up. The most common default location is the Documents folder on the hard drive (C:), OneDrive folder (cloud based), or the desktop. Once the file has a name and location, using any of the Save commands noted above updates the file by saving any changes to it. The Save As dialog window will no longer appear when working in the document unless you select the File, Save as option.

Prior to saving a document, consider how you want to access the document in the future. If you are working between different computers, networks, or office locations or if you are sharing a document with others, it may be preferable to save to a cloud-based folder such as OneDrive, OneDrive for Business, Google Drive, or Dropbox. All folders are file hosting services that provide storage in the cloud allowing access from any location or device. You may also save to a shared folder on a network file server. If cloud access from other devices or locations is not needed, saving to the computer's hard drive may be more favorable. To select a location to save a document use the Save As option.

To Access the Save As Option:

1. Click **File** tab, then **Save As**.
2. Select a **Location** to save the file; OneDrive, This PC (computer being used to create the document), or other locations can be selected.
3. Type a **Name** for the file.
4. Select the **Format** for the file. The default format is docx for Word, xlsx for Excel, and pptx for PowerPoint.
5. Click **Save** button.

When the Save As option is selected a window similar to that seen in **FIGURE 4-15A** appears. A list of locations is found on the left side, and a list of folders where recent files were saved appears on the right side. Once the location is selected you will see a new window similar to those shown in **FIGURE 4-15B**. At this point you must name the document and select the *file format* you want to save as. The file can be saved in the default format (docx in Word), Word 97–2003 format (.doc), Rich text, or Plain text or in other formats such as PDF. The Save As command can also be used to change the name or location of a document or to save a revised version of the document while keeping the original as is. NOTE: Your screen may vary, but all the options discussed here will be present.

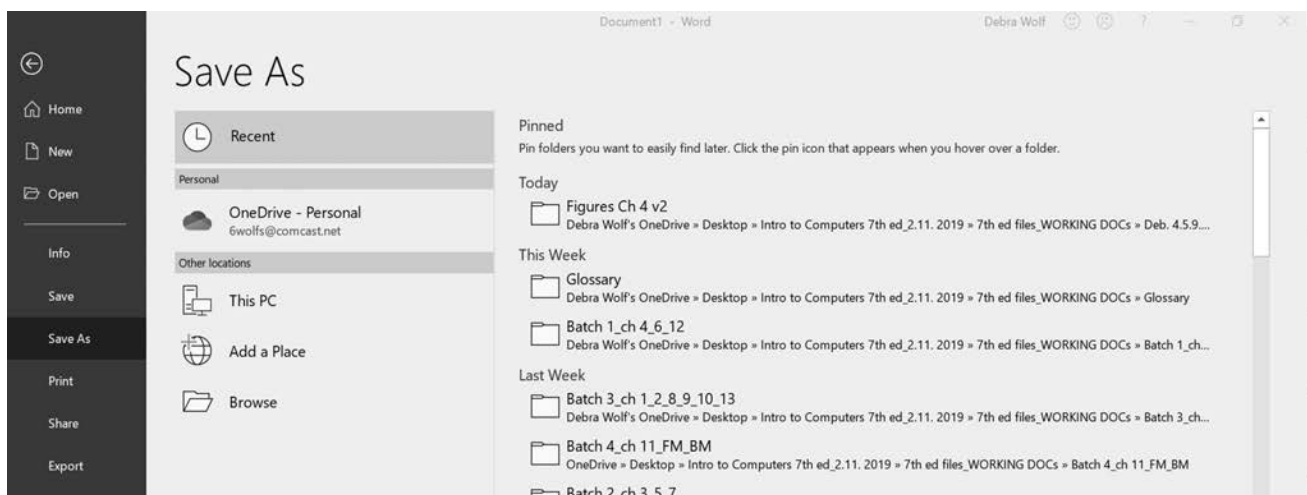


FIGURE 4-15A Save As Window

Used with permission from Microsoft.

To Access the Save Command:

1. Click the **Save** icon on the QAT (see Figure 4-3) or click the **File** tab and select **Save** from the list of options. Alternatively, press **Ctrl+S**.

To Change the Computer's Default Save Location:

1. Right-click **Start** icon (in Office 2019 just click **Start** icon), select **Settings**, then **Systems**.
2. Select **Storage** from list.
3. Click on “**Change where new content is saved**” (see **FIGURE 4-16A**).
4. Under “New documents will save to:” click the **drop-down menu** and select the location you prefer (see **FIGURE 4-16B**). NOTE: You only see options other than PC if a device is inserted into the USB port.

A nice feature of Office is the *AutoRecover* functionality, which saves your document if the application you are working in closes unexpectedly (such as during a power failure) before you formally named and saved the



FIGURE 4-15B Save As Window, Name and File Type Box Displayed

Used with permission from Microsoft.

document. By default, the AutoRecover saves every 10 minutes to a default location. The timing and location can be adjusted based on user preferences.

To adjust AutoRecover time and location feature:

1. Select **Options** from the **File** tab.
2. Select **Save** option.
3. Be sure the box to the left of **Save AutoRecover information every** is checked and then set the time as you prefer (e.g., 10 minutes). Click **OK**. The default location for autosaving files can be found here and changed if desired. AutoRecover does not take the place of saving a document (**Ctrl+S**) every so often (every 10 minutes or so). On public computers you will not be able to alter these settings (see **FIGURE 4-17**).

When a document is saved to OneDrive, OneDrive for Business, or a SharePoint the file will be saved automatically every few seconds. This feature is called **AutoSave** and is a different function than **AutoRecover**.

Opening, Minimizing, and Closing a File

Common to all applications is the function of opening, minimizing, and closing files. Once a document is created and saved with a unique file name, it can be reopened at a later date for additions and/or corrections.

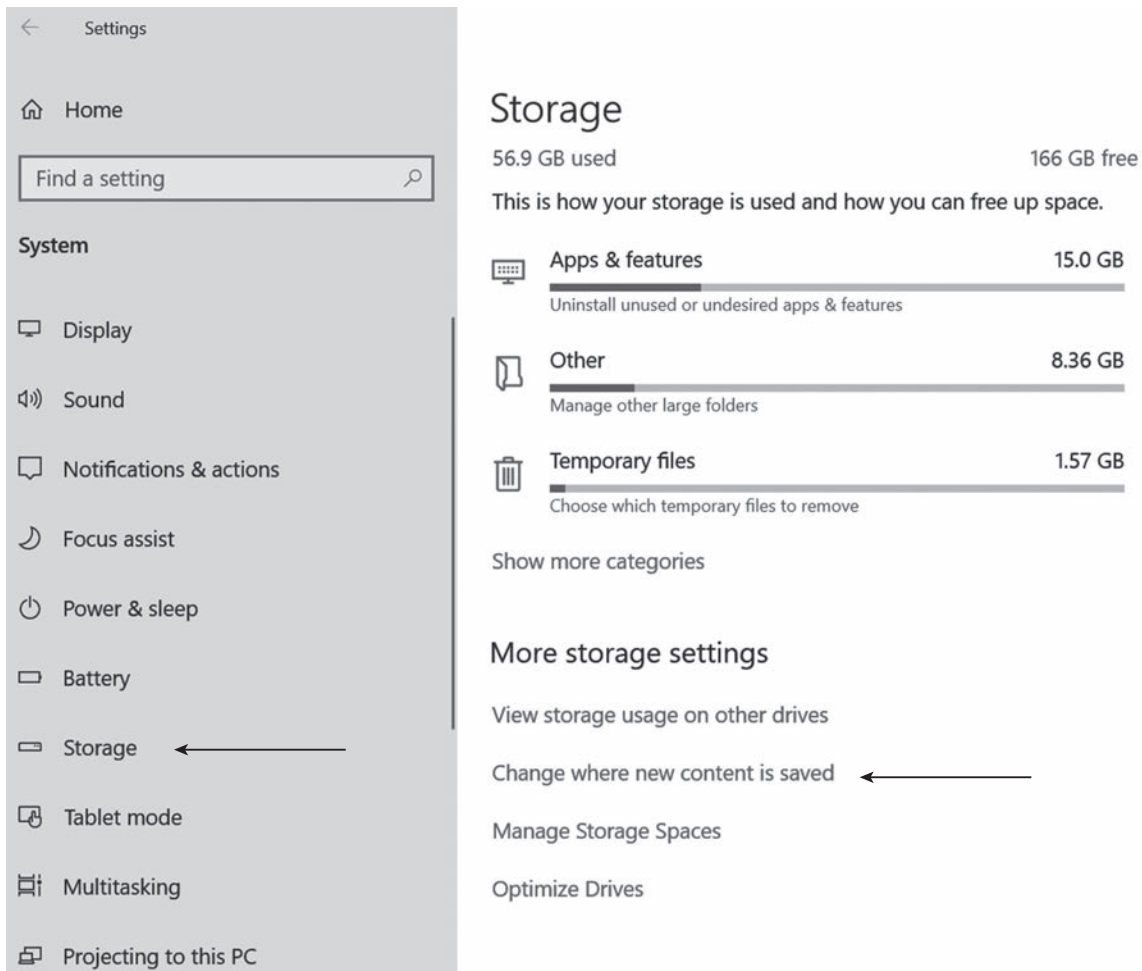


FIGURE 4-16A Changing the Computer Default Save Location
Used with permission from Microsoft.

Change where new content is saved

Change where your apps, documents, music, pictures, videos and maps are saved by default.

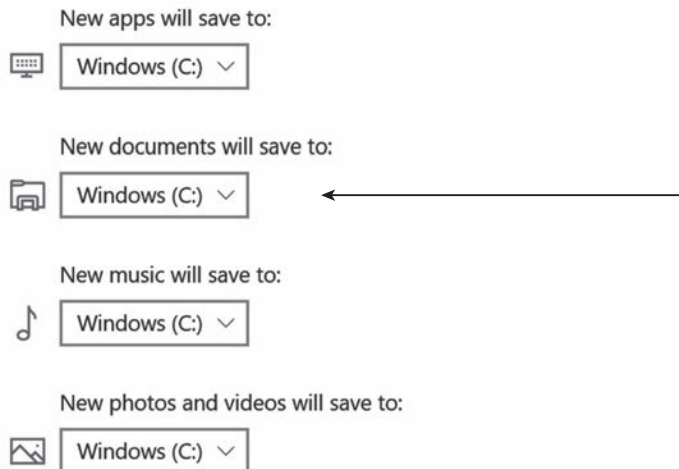


FIGURE 4-16B Selecting New Default Save Location
Used with permission from Microsoft.

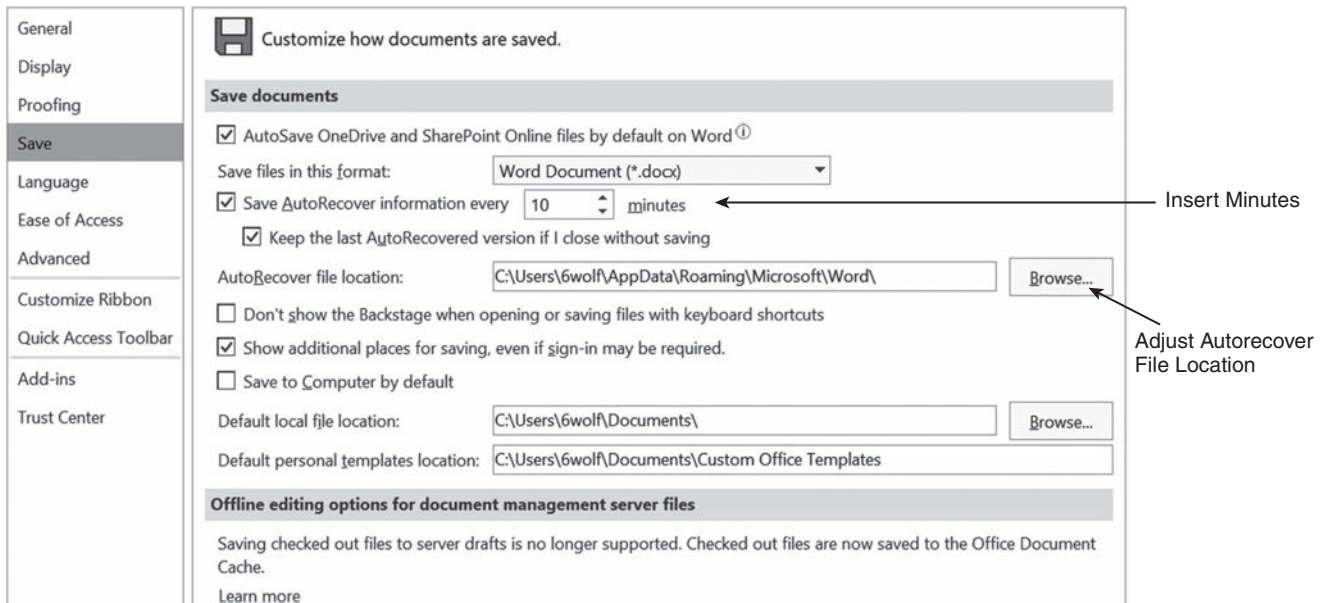


FIGURE 4-17 Adjusting AutoRecover Time and Location

Used with permission from Microsoft.

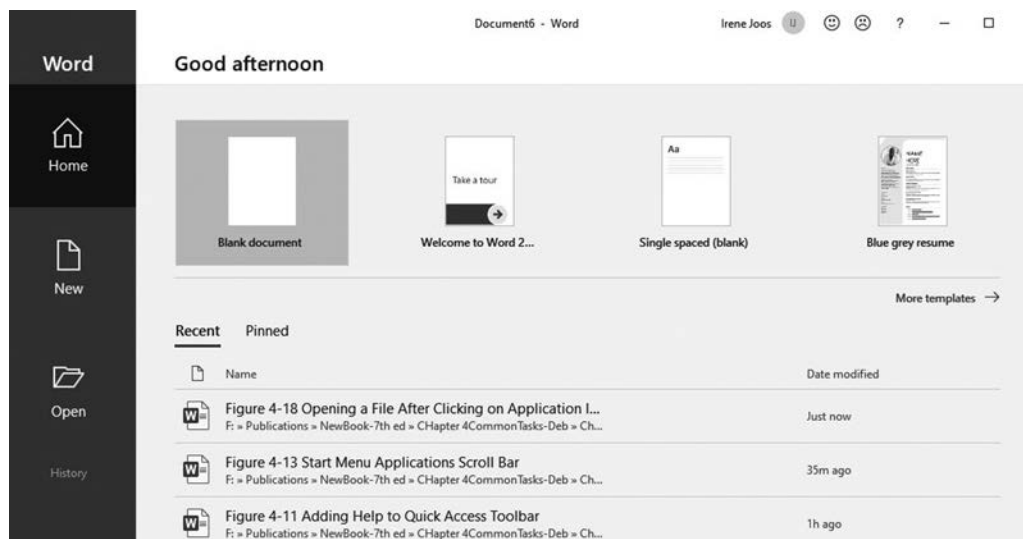


FIGURE 4-18 Opening a File After Clicking on Application Icon

Used with permission from Microsoft.

To Open a File:

In Windows 10, there are several ways to open a document. Below are a few easy and quick ways to open a document regardless of which Office application the document was created in.

1. Begin by clicking the **application icon** on the taskbar, desktop, or the **start menu** used to create the document. In the dialog box that appears, a list of recently saved documents/files appears on the right side (see **FIGURE 4-18**). NOTE: If the file was saved to an external storage device, that device needs to be connected to the USB port for files to be visible to open. Click the **name of the file** you want to open. You can also open a new blank document, then file tab, and then open. A list of saved files will appear

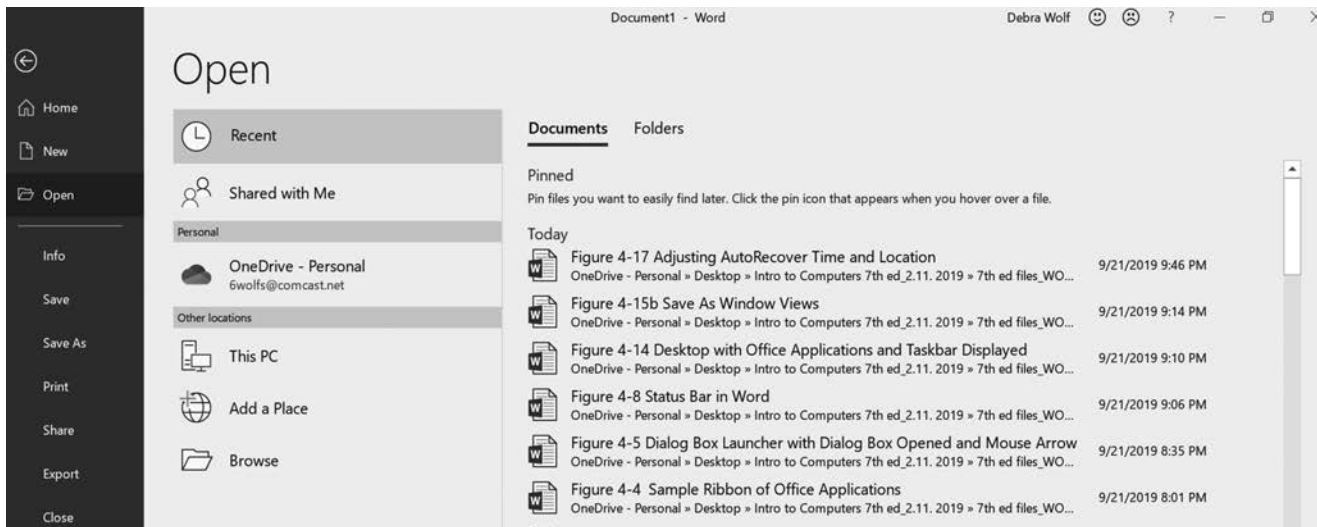



FIGURE 4-19 Opening a File From File Tab and Ctrl+O Command


Used with permission from Microsoft.

on the far right of the screen. Click the **name of the file** you want to open. Or you can search for files in other locations on the computer, search in OneDrive, or browse other folders. You can also search for files shared with you by others (see **FIGURE 4-19**).

2. Next, you can use **File Explorer** to open files. File Explorer helps you to manage your files for all Office applications. File Explorer icon  can be found on the taskbar (appears as a yellow folder); by right-clicking the **Start** icon and then selecting **File Explorer** option; or by pressing the **Windows logo key + E** (see **FIGURE 4-20**). When opened, File Explorer provides a list of folders and locations (such as external storage devices or network file servers) on your computer where files have been saved. If you cannot remember where you saved a document, you can use the **search box** found within File Explorer. Type the **name of the file** in the search box and click **Enter**. A list of files will appear.
3. If a file was saved to the desktop, or in a folder located on the desktop, you can click directly on the **file image** or **folder** to open the document.
4. Within an application, you can also press **Ctrl+O** and list of files that have been previously saved will appear.

If a document was shared with others and is saved in a cloud-based folder, such as OneDrive, the user has the option of opening different versions of the same document. The option of opening different versions allows users to reflect on changes made at different points in time and by different users. **FIGURE 4-21** outlines the Version History icon found on the application menu and a list of several versions of the same file.

To Minimize a Document:

1. Click the **Minimize** icon  in the upper right corner of the window (see Figure 4-3) and the document will disappear from the computer screen.
2. Click the **Word** icon on the taskbar located at the bottom of the screen, and the document will open to full screen view.

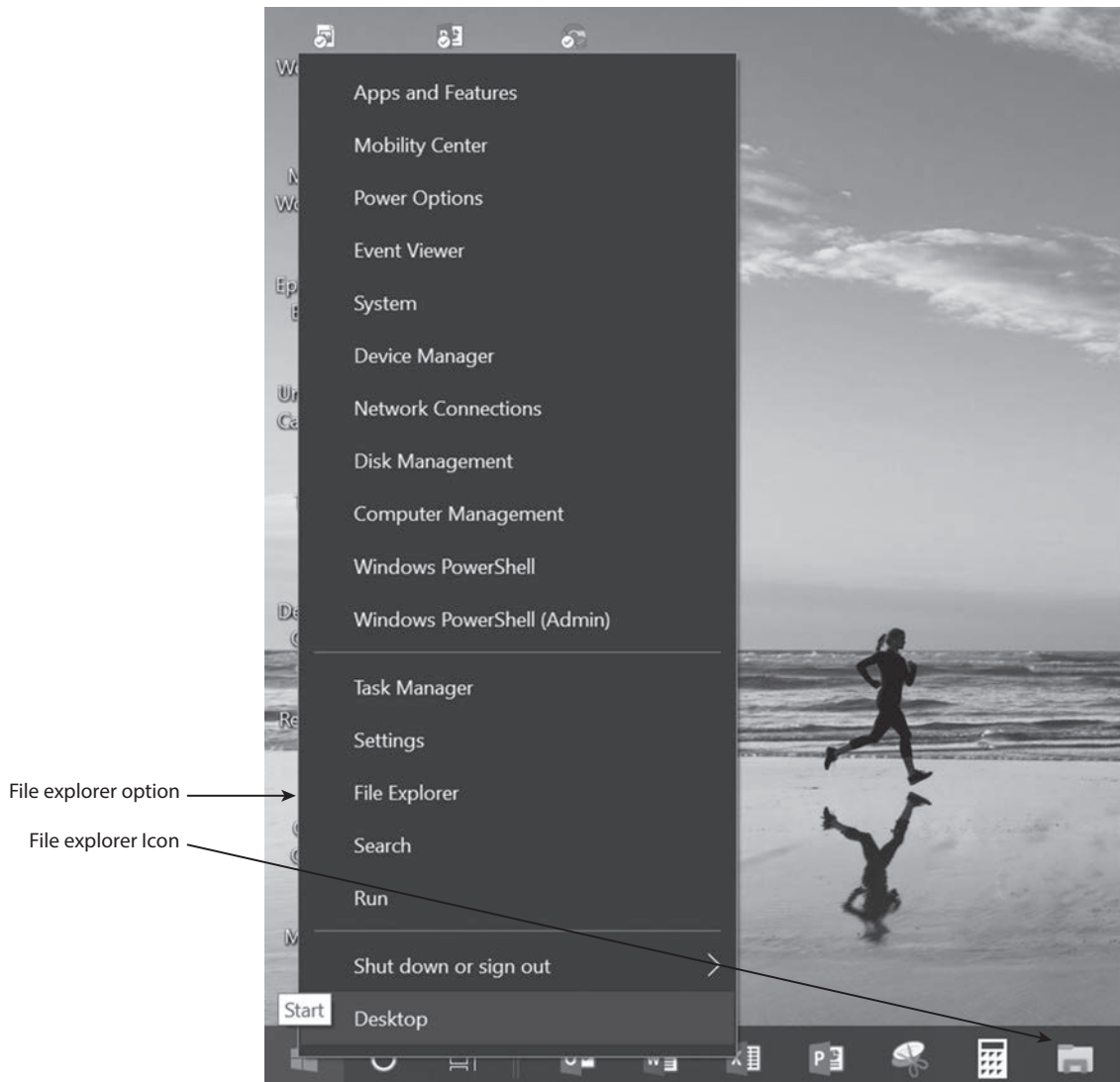


FIGURE 4-20 File Explorer

Used with permission from Microsoft.

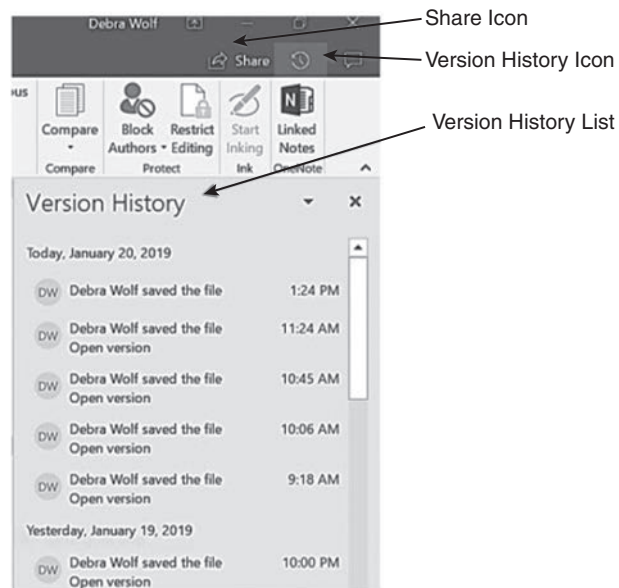






FIGURE 4-21 Share and Version History Dialog Box

Used with permission from Microsoft.

To Restore Down a Document:

1. To reduce the size of the window you are viewing, click the **Restore Down**  icon in the upper right corner of the window (see Figure 4-3). Reducing the size of the window allows the user to see part of the desktop or other applications that may be open.
2. To return the screen to full size, click on the **Maximize** icon  that now replaces the Restore Down icon. The Maximize icon appears as a single square next to the Close icon .

To Close a Document:

1. Click the **Close** icon  in the upper right corner of the window (see Figure 4-3).
2. If changes were made to the file and it was not saved, you will be prompted to save the file before closing it. Respond to the prompt.




Other options for closing a file include:

- Select the **File** tab, and click the **Close** option.
- Press **Ctrl+F4** on a traditional keyboard.

Sharing a Document With Others in the Cloud

Office applications provide users the opportunity to share files via the cloud. By sharing files, people can work collaboratively on editing or updating documents while maintaining one unified file. Microsoft Office provides a cloud-based storage service called OneDrive that offers 5 GB of storage. Other cloud storage services include Google Drive and Dropbox.

To Share a Document:

1. Open the document you want to share:
 - a. Click **Save As** and select **OneDrive**  (or other cloud service) and click **Save**. The document must be saved in a cloud-based storage such as OneDrive or on a network file server in order to be shared.
 - b. Click the **Share** icon  located on menu's right-upper (see Figure 4-21). In Office 2019 the Share icon looks different .
 - c. When the dialog box opens, type the **email address** of the person you want to share with or click the address book to select a contact. NOTE: A new drop-down box appears.
 - d. Select **Can Edit** or **Can View** from the new drop-down box depending on which level of access you want to grant others.
 - e. Type a **message** to the person if preferred and click **Share** button.
2. Another way to share a document is to use the **File** tab:
 - a. Open the **document** and save to **OneDrive**, following the steps above.
 - b. Click the **File** tab.
 - c. Click the **Share** option.
 - d. When the share dialog box opens, follow the steps listed above to share the document.
3. The final way to share a document is by creating a **Sharing link**.
 - a. With the document opened and saved to OneDrive, click the **Share** icon:
 - b. At the bottom of the Share dialog box, click **Get a sharing link**.

- c. Click the **button** to Create and edit link or to Create a view-only link, depending on your preferences.
- d. Click the **Copy** button to copy the link.
- e. Open a **new email**, **right-click**, and select **Paste to copy** the link in the body of the email. **Send the email** to the persons you want to edit or view the document.

Printing Files

To Print a Document:

1. Click the **File** tab. Then click the **Print** option. **FIGURE 4-22** shows the Print dialog box that appears. **Ctrl+P** also opens the Print dialog box.
2. On the right side of the Print dialog box, a Print Preview screen displays the document as it will look when printed. You can page through the document by clicking the page arrows in the bottom of the screen.
3. Edit settings as needed. These settings include changing the printer; choosing the number of copies to print; printing the total document, the current page, print one side vs. both sides, the selection, or selected pages; or collating multiple page documents. Adjust the options as needed. Click the **Print** icon located near the top of Print dialog screen.
4. If you added the Quick Print command/icon to your QAT (see Figure 4-3), you can click the icon to print directly to the default printer. There is no option to alter settings such as selected number of pages, printer, and so forth.

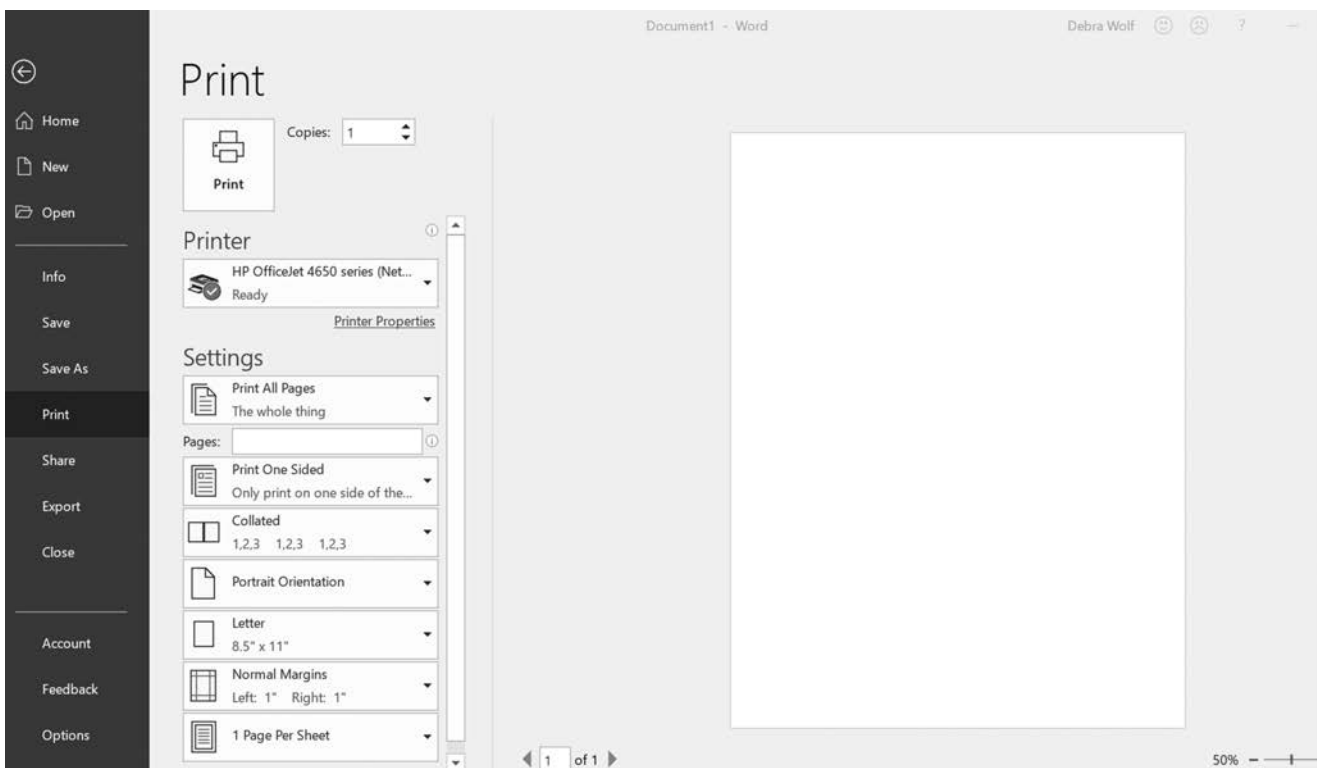



FIGURE 4-22 Print Dialog Box

Used with permission from Microsoft.

Finding and Replacing Words

Another common task performed when working in Office applications is the *Find* or the *Find and Replace* function. Use the Find function to search a document for a specific word, phrase, and/or punctuation. Use the Find and Replace function if you want to change the word, phrase, and/or punctuation to something different. Instead of manually searching for or replacing the word, phrase, and/or punctuation, the computer can search the complete document and make the change for you. In Word, Excel, and PowerPoint both of these functions are located within the Home tab to the far right in the Editing group.

To Access the Find Feature Only:

1. Select the **Home** tab and click **Find**  in the Editing group. A Navigation box will open.
2. **Type the word** you want to search for in the box.
3. You can choose “Browse Headings” or “Browse Pages” or just press **Enter**. All occurrences of the word will be located and bolded.
4. If there are multiple occurrences of the word that does not fit in the results pane, continue clicking the down arrow until all instances of the word or phrase are found. **FIGURE 4-23A** displays the navigation pane when the word “name” was searched.
5. Click the **Close** icon in the navigation pane to close the Navigation dialog box.

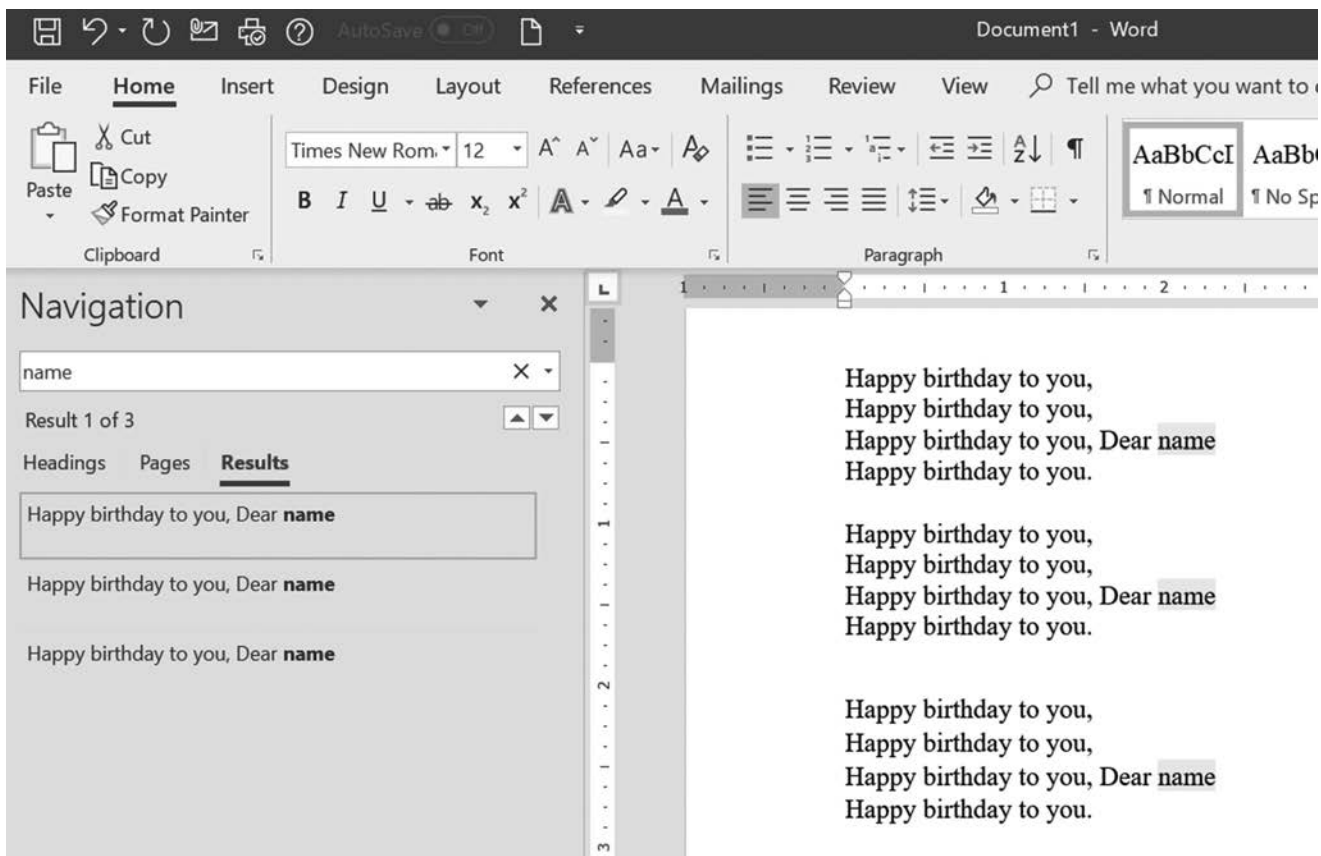


FIGURE 4-23A Find Navigation Pane Displaying Search Results

To Access Find and Replace Feature:

Most people find this feature more useful than the **Find** feature.


1. Click **Replace**  in the Editing Group, and the **Find and Replace** dialog box appears.
2. Type the **text, punctuation** or **word** in the search box.
3. Click the **Replace with** text box.
4. Type the replacement **text, punctuation** or **word** and click **Replace**.
5. Continue clicking **Replace** until all the instances of the word are either left alone or replaced.

FIGURE 4-23B shows the choices available when the option of “More” is clicked and match case is selected. In this example, the word to find is *name*, and the replacement word is *new*. Be careful with the Replace All button. The button automatically replaces all instances of *old* with *new*, which might not be desired. The Find feature is not automatically case sensitive, although the option to match case was selected here. In most cases the best practice is to use the Find Next option that requires you to confirm the replacement before moving to the next occurrence.

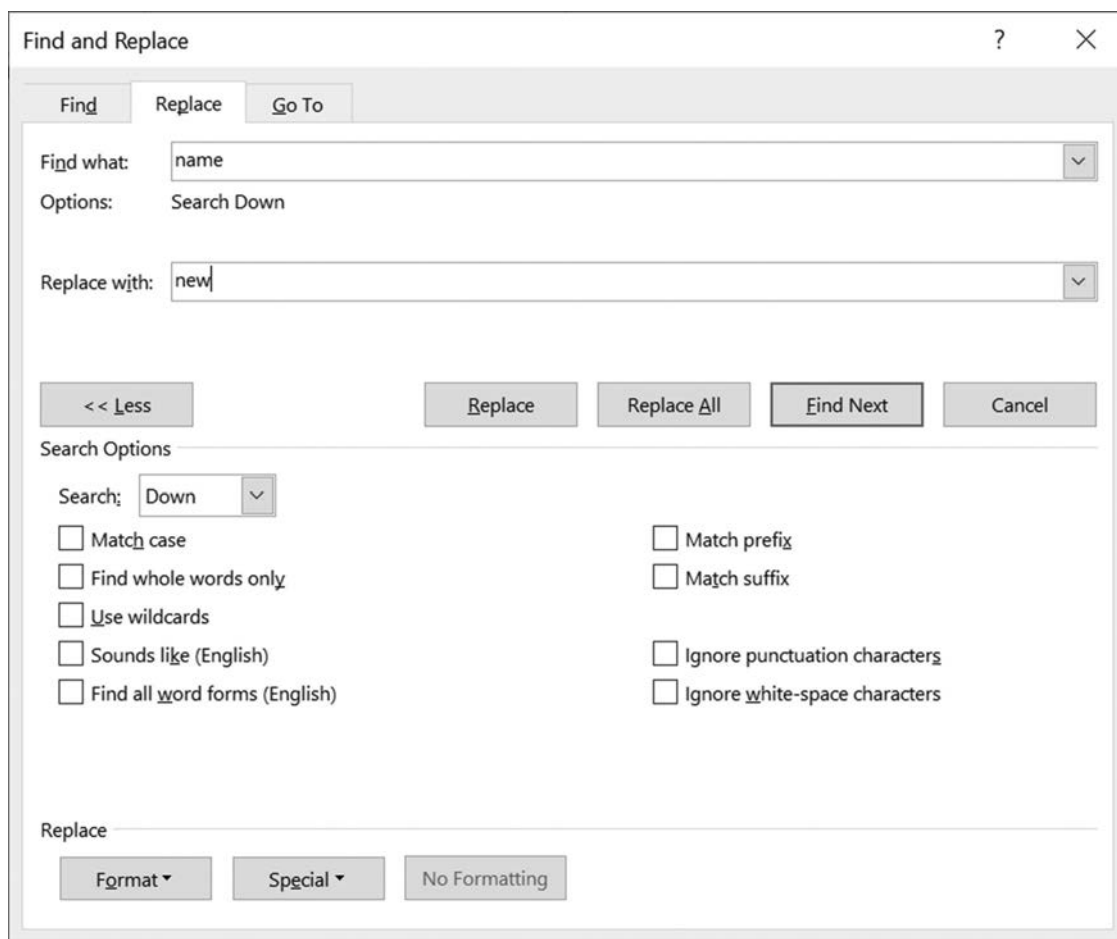


FIGURE 4-23B Find and Replace Dialog Box With “More >>” Selected

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Selecting Text or Objects

Selecting text or objects means to highlight the text or object, such as a word, image, or cell in a spreadsheet. This is a common task when editing documents. Although it is fine to use the delete and backspace keys to complete minor editing tasks, it is not efficient for editing lines, sentences, paragraphs, columns, rows, cells, or an entire

document. You can also use this feature when formatting documents. Once again, each item can be formatted separately, but this is very time consuming.

Each application has some minor variations for selecting or highlighting text and cells. Described here are some of the most common techniques for selecting items. Additional techniques are presented in future chapters for each application.


Select	Mouse Action
A word	Double-click the word .
Several words	Left-click mouse (holding mouse down) and drag the cursor over the words. You can also select (double-click) the first word of a sentence or paragraph, hold down the Shift key, and double-click the last word.
A sentence	Hold down the Ctrl key and click anywhere in the sentence .
A line	Click in the quick select area (this refers to the margin/area to the left of a line of word) and the cursor turns into a right slanted arrow when placed in the margin on the left side of the line.
A paragraph	Click in the quick select area next to the paragraph and double-click.
Entire document	Triple-click the quick select area . Use Ctrl + A .
A cell	Click the cell .
Multiple cells	Drag cursor over the cells.
A slide	Click in the slide
Multiple slides, contiguous	Click the first slide, hold down the Shift key, then click the last slide to be selected. These slides must be contiguous (i.e., next to each other).
Multiple slides, noncontiguous	Hold down the control key (Ctrl) and click each slide to select and then release the Ctrl key .

In addition to using mouse strokes, the keyboard can be used to select text. This is especially helpful when content to be selected spans greater distances or is on the edge of the document. For example, to select text that spans several pages, place the cursor at the beginning of the text to be selected. Hold down the **Shift** key and use the arrow keys (typically located on bottom right corner of keyboard) to select content further down the document. As the cursor is moved, all of the text is highlighted. This technique also works in spreadsheets to select multiple cells. If you need to select the entire document, press **Ctrl + A**. The entire document is now selected. You can also use the Editing group on the Home tab to select text. Click Select and the option to Select All appears.

Editing Text

Three basic editing features are used in applications: inserting, deleting, and replacing items.

Insert means to add new text, slides, rows, columns, and so forth. In word processing programs, insert is the default, which automatically occurs. When the user starts typing, the characters are placed at the insertion point. In applications for spreadsheets and graphics, commands must be used to insert rows, columns, or new slides. These commands are covered in each application chapter.

Delete means to remove text, a row, a column, an image, or a slide from the document. **Select** what must be deleted and press the **Delete** key (located upper right corner of keyboard). If a mistake is made, go to the QAT and choose the **Undo** icon . In some applications, go to **Edit** and choose **Undo Typing**. Additional features available for deleting are covered in the appropriate application's chapter. Note the difference between the **Delete key** and **Backspace key**. The Delete key deletes text to the right of the insertion point, whereas the Backspace key deletes text to the left of the insertion point.



Replace means to substitute one thing for another. In most cases it is not necessary to first delete the old text or item and then type or insert the new. Highlighting or selecting the text changes it to the replace mode. Therefore, typing the replacement will delete what was highlighted. It is not necessary to delete it before typing.

Copying or Moving Text


The last of the common tasks presented in this chapter deals with copying or moving text from one place to another in the same document, from one document to another, or from one application to another. The most common method uses the **cut/copy/paste commands**; these commands use the concept of a clipboard as a temporary holding place for the cut or copied material. In Excel, PowerPoint, and Word the tools for cutting and copying can be found on the ribbon in the same place (far left side of the Home tab), in the clipboard grouping.


Another method for copying or moving content is the **drag-and-drop** method. This method relies on selecting data and using the mouse to drag it to the new spot. The general rule for selecting the best method is based on distance to move or copy the material and how many times you want to paste the item. For short distances in the same document, use drag and drop. To copy or move data longer distances (to another page, to another document, or to another application), or to paste content multiple times, use the cut-and-paste clipboard strategy. To paste items multiple times, use the clipboard. Use the Format Painter to copy formatting from one place to another.

To Copy Data Using the Clipboard:

1. Select the **data** to be copied.
2. Click the **Copy** icon  **Copy** .
3. Place the cursor at the **insertion point** where the copied data will be placed.
4. Click the **Paste** button  .

To Move Data Using the Clipboard:

1. Select the **data** to be moved.
2. Click the **Cut** icon  **Cut** .
3. Place the cursor at the **insertion point** where the data will be moved.
4. Click the **Paste** button  .

When pasting content, it is important to know where the insertion point is because that is where the **Paste command** will place the content. The mouse pointer (I-beam) does not reflect where the data will go. If the data are to be moved to another document or application, you must use either the **File** tab or the **File name** to access the other document in the application or click on the application button from the Start menu to get to another application (refer to Chapter 3 if you are unsure about how to do this). If the document where you want to paste content is currently open, you can click the **Task View** icon  found at the bottom of the screen on the taskbar to display opened documents to paste content into.

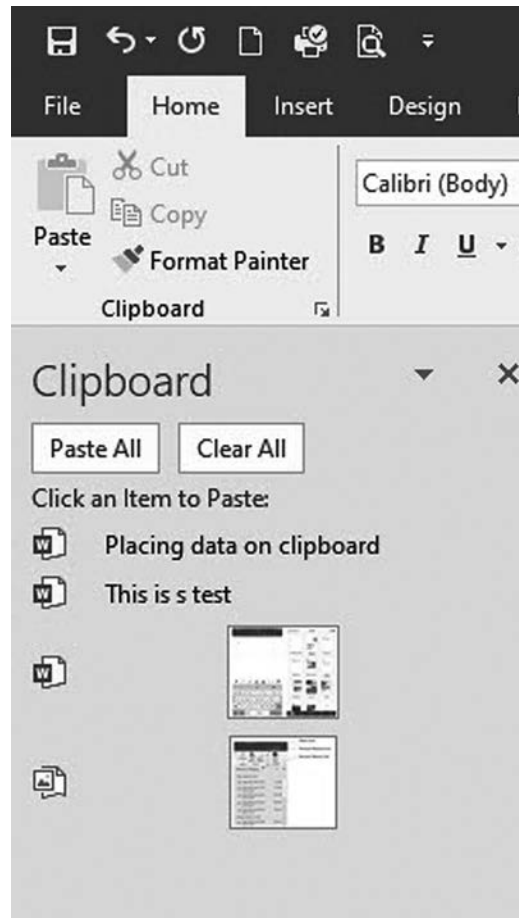


FIGURE 4-24 The Clipboard Task Pane


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To see items collected in the Office *Clipboard* the clipboard must be displayed (see **FIGURE 4-24**). Items that are cut or copied will appear there. Multiple data may be placed on the Office Clipboard at one time and may be used in any other documents. The Clipboard task pane will show how many items are on the clipboard with the last item copied at the top. You have the choice of pasting one or more of these items into a new document or clearing the clipboard. The Office Clipboard can hold 24 items at one time. When the 25th item is added, the first one is deleted. The last item added to the Office Clipboard is also sent to the system clipboard. When you close an application, you will be reminded that there is a large amount of content on the clipboard; then you will be asked if you want the content available to other applications after you quit Word or whatever application you are using.

Microsoft Windows also has a clipboard that is different from the Office applications clipboard. Starting with the October 2018 Windows update, users can gain access to the system clipboard to use paste functionality and view history. For more information on the system clipboard see Microsoft Windows Support at <https://support.microsoft.com/en-us/help/4464215>.

To Paste the Contents via the Office Clipboard into a New Document:

1. Open a **New** document.
2. Click the **Clipboard Dialog Box Launcher** to display the **Office Clipboard**. The clipboard task pane appears.
3. Click the **items** to add to the new document.

A new document can be created from multiple items on the Office Clipboard. Items stay in the Office Clipboard until the user exits Microsoft Office or clicks the Clear All button  in the clipboard task pane. When clearing the Office Clipboard, the system clipboard is also cleared.

The cut/copy/paste commands can also be accessed through the keyboard. After selecting the text, press **Ctrl+X** for cut, **Ctrl+C** for copy, and **Ctrl+V** for paste. To remember these shortcuts, think of opened scissors cutting for X, C for copy, and V for Velcro, referring to sticking, or paste. The letter keys, X, C, and V for these commands are in the same order on the bottom row of the keyboard.

To Move Data Using the Drag-and-Drop Method:

1. Highlight the **content** or data to be moved.
2. Place the pointer on the **selected area**.
3. Hold down the **left mouse** button.
4. Move the **mouse** so the insertion point (broken vertical bar) is in the new place.
5. Release the **mouse** button.

Notice the changing look of the mouse pointer when using drag and drop. The mouse pointer turns to a left-slanted arrow with a box below it, and the insertion point turns to a broken vertical bar. Cut (move) is the default option when using the drag-and-drop method.

To Copy Data Using the Drag-and-Drop Method:

1. Select/highlight the **data** to be moved.
2. Place the pointer on the **selected area**.
3. Hold down the **Ctrl** key.
4. Hold down the **left mouse** button.
5. Move the **mouse** so the insertion point (broken vertical bar) is in the new place.
6. Release the **mouse** button and then the **Ctrl** key.

If the Ctrl key is released before releasing the mouse button, the selected data will be moved, not copied. When copying, the pointer appears the same as it does when cutting except that there is a plus sign in the box below the pointer.

Office 365 Common Tasks for iPhone and iPad

The amount and level of common tasks users have to view and edit within the applications on iPhones and iPads will depend on their particular Office plan. Qualifying plans such as Office 365 Personal, University, or Business Essentials permit editing, but nonqualifying plans such as one-time purchases or Office Home and Student do not. Several of the most common tasks shared above, such as printing, saving, formatting, editing, seeking help, and spellcheck, are accessible through the apps.

► Keyboard Commands Using Shortcut Keys

Office applications allow several ways of using the keyboard keys to take shortcuts in performing certain commands such as copy, delete, or print. Shortcuts can be taken when the Alt (alternate) key or the Ctrl (control) key is clicked along with another predetermined key(s). If the shortcut has two or more keys joined by a “+” sign (e.g., Ctrl+S), then the keys are to be pressed simultaneously. If a comma separates the keys (e.g., Alt+R, C), then the keys are to be pressed in the order listed, one after the other. Most of the shortcut commands work in all Office

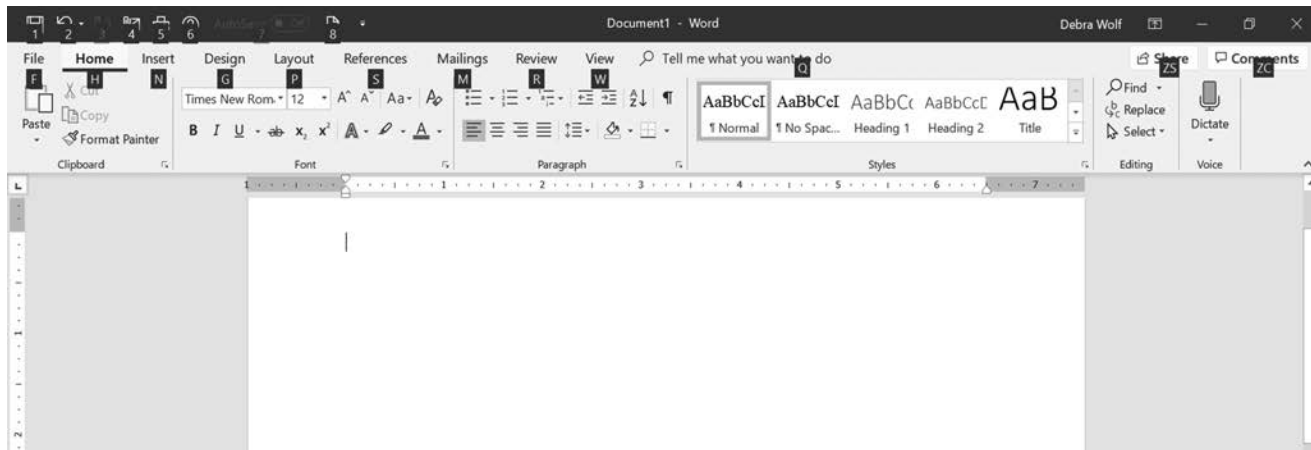


FIGURE 4-25 KeyTips Badges

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applications. Using the keyboard shortcuts may be easier than using a touchscreen monitor or working with a mouse, avoiding right- and left-clicking motions. This approach is especially helpful for those with hand mobility or vision issues.

Keyboard commands (also known as access keys) can be used to perform tasks using the ribbon found within the application. Access keys allow the user to advance to a specific part of an application or task quickly. Pressing the Alt key can activate (or visualize) or deactivate the access keys. **FIGURE 4-25** shows what happens when the Alt key is pressed, for *KeyTip badges* appear (small black boxes with letters and numbers). If you press Alt and one of the letters shown, additional KeyTip letters and numbers appear for the groups in that tab. For example, press **Alt+H** and you will see the group of KeyTips including the KeyTips for **Bold** (which is number 1); then press **Alt+1** and the next thing typed will appear in boldface. NOTE: This can also be accomplished by pressing **Ctrl+B**. If the **cursor** is inside a word, that word will be changed to bold. To cancel KeyTips, press **Alt** again. The **F10** key will also show the KeyTips.

If you press **Alt+F** in a new Word document, the menu for the File tab appears. Next to each command is the keyboard shortcut. For example, to save press **S**. If you press **Alt+F** in a Word document already opened and saved, you would press **A**. These letters work only when this particular menu is present; otherwise, **Ctrl+S** is the keyboard shortcut for Save. These shortcuts work in all Office applications. Your level of comfort in computing and in using the applications will determine your ease in using keyboard commands (access keys). Basically, access keys provide users a way of moving quickly or more efficiently without clicking through a ribbon or menu using a mouse.

Keyboard shortcuts can also be used to improve efficiency when working in Office applications. Shortcuts also require the user to press and hold several keys simultaneously or in sequence. Throughout this chapter, several keyboard shortcuts (also known as hot keys) are introduced. **TABLE 4-1** lists the common commands and associated shortcut keys for Office. These shortcuts will work in most Office applications.

Additional Common Office Tasks

Office has additional common tasks that cross all applications that are covered in chapter 5 which discusses Word application, chapter 6 which covers PowerPoint, chapter 7 which covers Excel and Chapter 8 which covers additional Excel database features. These tasks relate to the Insert, Page Layout, and Review tabs and include such features as spelling and grammar checker, thesaurus, comments, page orientation, margins, and inserting images and pictures, and tables.

TABLE 4-1 Keyboard Commands and Shortcut Keys

Command	Keys	Command	Keys
Select A ll	Ctrl+ A	Move Right between Tabs on Ribbon	Alt,> (right arrow key)
B old	Ctrl+ B	Move Left between Tabs on Ribbon	Alt,< (left arrow key)
C opy	Ctrl+ C	Closes application	Alt+F4
D elete	Ctrl+ D	To use Backstage view, open the File page	Alt+F
C enter	Ctrl+ E	To use themes, colors, and effects, such as page borders, open the Design tab	Alt+G
F ind	Ctrl+ F	To use common formatting commands, paragraph styles, or to use the Find tool, open Home tab	Alt+H
G o to	Ctrl+ G	To manage Mail Merge tasks, or to work with envelopes and labels, open Mailings tab	Alt+M
Replace	Ctrl+ H	To insert tables, pictures and shapes, headers, or text boxes, open Insert tab	Alt+N
I talics	Ctrl+ I	To work with page margins, page orientation, indentation, and spacing, open Layout tab	Alt+P1
J ustify (Full Justify)	Ctrl+ J	To type a search term for Help content, open "Tell me" box on ribbon	Alt+Q, then enter the search term
Insert Hyperlink	Ctrl+ K	To use Spell Check, set proofing languages, or to track and review changes to your document, open the Review tab	Alt+R
L eft Align (Left Justify)	Ctrl+ L	To add a table of contents, footnotes, or a table of citations, open the References tab	Alt+S
Indent	Ctrl+ M	To choose a document view or mode, such as Read Mode or Outline view, open the View tab; also, set Zoom magnification and manage multiple windows of documents	Alt+W
Open New Document	Ctrl+ N	Open Zoom dialog box	Alt+ W, Q
O pen a Document	Ctrl+ O	Split the document window	Alt+Ctrl+S
P rint	Ctrl+ P	Add a comment	Alt+R, C
R ight Align (Right Justify)	Ctrl+ R	Turn "change tracking" on or off	Alt+Shift+E
S ave	Ctrl+ S	Insert emojis	Windows key+. (period)

(continues)

TABLE 4-1 Keyboard Commands and Shortcut Keys*(continued)*

Command	Keys	Command	Keys
Tab	Ctrl+ T	Cancel	ESC
U nderline— U nderscore	Ctrl+ U	Redo	Ctrl+ Y
Paste (V elcro)	Ctrl+ V	Undo	Ctrl+ Z
Close	Ctrl+ W	Decrease font size 1 point	Ctrl+[
Cut	Ctrl+ X	Increase font size 1 point	Ctrl+]

► Summary

This chapter presents some of the common layouts and tasks found within the Microsoft Office applications. Standard commands and shortcut keys used in the applications are also shared. Specific content describing the online help, common tabs, and group commands are discussed, referencing how to perform such tasks as opening, creating, closing, saving, finding and replacing words, and printing files. In addition, the cut/copy/paste and drag-and-drop functions to move or copy data from one file to another in the same and different applications are presented. Most of these layouts, commands, and tasks cross several Office applications and provide some consistency when working in the Windows 10 environment.

Resources

Microsoft Office. (n.d.). *Get Office for iOS*. Retrieved from <https://products.office.com/en-us/mobile/office-mobile-apps-for-ios>

Microsoft Office. (n.d.). *Install and set up office on an iPhone or iPad*. Retrieved from <https://support.office.com/en-us/article/install-and-set-up-office-on-an-iphone-or-ipad-9df6d10c-7281-4671-8666-6ca8e339b628>

Microsoft Office. (n.d.). *Office 365 training center*. Retrieved from <https://support.office.com/en-us/office-training-center>

Microsoft Office. (n.d.). *Welcome to Office help and training*. Retrieved from <https://support.office.com>

Microsoft Windows Support. (n.d.). *Get help with clipboard*. Retrieved from <https://support.microsoft.com/en-us/help/4464215>

Exercises


Exercise 1: Common Tasks: Create, Open, Close, Find, Print, Save



NOTE: This exercise can be skipped if you know how to open an application, start a new document, type a few words, and save it to a specific place.

Objectives

1. Create a new document using the File tab, New option, or the New icon on the QAT.
2. Use the commands from the File tab menu and the QAT to open, close, print, and save a file.
3. Use the Find and Replace command to replace text and the Windows Find command to locate a file.

Activity

1. Start an application.
 - a. Click **Start** button . Use scroll bar to find the Word application icon and then click to open. Other methods may be used to open Word such as clicking on the Word icon located on desktop or taskbar. Use the technique that is appropriate for the computer being used.
 - b. Select a **Blank Document** from templates provided. Type **I'm learning how to create a new word processing document using Word.**
 - c. Click the **File** tab.
 - d. Click **Save**.
 - e. Select **This PC**, then whatever folder or storage device is used for this class. (This could be a folder created for another chapter with the name of your course.)
 - f. In the File name text box, type **LearningWord**.
 - g. Click **Save**.
2. Open and save another document.
 - a. Click the **File** tab in the Learning Word document you just saved. Click **New** and open a second blank document.
 - b. Type: **I'm creating this second document to tell you about why I entered the healthcare field.**
 - c. Press **Ctrl+S** (remember to press both keys simultaneously).
 - d. Select the appropriate folder and storage device.
 - e. In the File name text box, type **ChoosingHealthcareProfession**.
 - f. Click **Save** or press **Enter**.
3. Open, edit, and save an existing document.
 - a. Click the **File** tab, then the **Open** (by default, a list of recent documents should appear).
 - b. Click **LearningWord** under Recent Documents. (If this file is not visible, make sure that the correct storage device and folder are selected.)
 - c. Edit the document by adding a sentence or two stating what you want to learn about Word.
 - d. Click **Save** under the **File** tab or press **Ctrl+S**. Notice the Save As dialog box did not appear because the file already has a name and location. The file was just updated. The file remains open.

4. Print the document.
 - a. Click the **File** tab, then the **Print**  command. What are your choices?
 - b. Select the appropriate **Printer** from the Print options menu by clicking the **down arrow** under Printer. Click **Print**.
5. Open and edit the second document.
 - a. Click the **File** tab, then click **Open**.
 - b. Click **ChoosingHealthcareProfession** under **Recent**. (If this file is not visible, make sure the correct storage device and folder are selected.)
 - c. Click the **File** tab and then **Save As**. The Save As dialog box appears.
 - d. Type **Nursing** or your healthcare major in the File name text box and press **Enter** or click **Save**. You now saved a third file with a new name.
 - e. Click the **File** tab, then **Open**, under **Recent** list of files; you will see all three files you just created listed.
 - f. Click the file titled **LearningWord** to open. You will now have three documents opened.
 - g. On the taskbar (located at bottom of screen), hover your mouse pointer over the Word icon. Three miniature windows will appear of the three documents you have opened.
6. Find and replace text.
 - a. From the taskbar, click on the **ChoosingHealthcareProfession** file.
 - b. Click **Replace** in the **Editing** group on the **Home** tab.
 - c. Click **More** button in dialog box.
 - d. Type the words **healthcare field** in the **Find what** text box.
 - e. Tab down to the **Replace with** box.
 - f. Type the lowercase word **nursing** or your **healthcare major** in the **Replace with** text box.
 - g. Click **Find Next** in the dialog box.
 - h. Click **Replace**. (Be very careful when using Replace All. Undesired things can happen to the document.) A message appears stating that Word has finished searching the document.
 - i. Click **OK** and then click **Close** in the dialog box. Notice what happened to the Word document.
 - j. Click **Save** icon in the **QAT** or **Ctrl+S** to save the file.
7. To close a document.
 - a. Click the **File** tab, then click **Close** or click the **Close icon**  located at the upper right corner of the window to close the document. You will also exit Word if this is the only Word document that is open.
8. Find a file using the Windows search feature. Sometimes it is easier to locate a file by using the Windows search feature.

On the Desktop:

- a. Click the **File Explorer** icon on the taskbar or **right-click** on the **Start** button (see Figure 4-20) to access File Explorer.
- b. Type **Learning Word** in the Search text box. As you type, files appear below the Search text box.
- c. Click the **LearningWord** document. The document opens provided it was stored on the hard drive during Activity 1.

On a Removable Storage Device:

- a. Open **File Explorer** as outlined above. A list of folders and storage locations can be found.
- b. Click the **removable storage device** where you are storing your files.
- c. Type **LearningWord** in the Search text box.

- d. Double-click the **LearningWord** document. The document opens provided it was stored on the removable storage device.
- e. Close all **open windows**.

Exercise 2: Obtaining Online Assistance or Help in an Application

Objectives

1. Use various options to gain assistance or to **Get Help** when working in Microsoft Office applications.
2. Navigate through the **Tell me what you want to do** screens.
3. Compare different ways of obtaining assistance to **Get Help** in Office.

Activity



1. Explore **Tell me what you want to do** in Microsoft Office Word application.
 - a. Open the Microsoft Word application and search for the template titled “APA style report (6th edition).” Click the **template** and then the **create button**. Note you must be connected to the Internet to access assistance or Get Help.
 - b. Locate the **Light Bulb** or **Magnifying Glass** icon and the **Tell me what you want to do** text box on the ribbon and click in the box, a drop-down menu will appear.
 - c. Type **change font** in the text box. Notice the drop-down menu changes, now select **Get Help on Change font**.
 - d. **Click** any of the four options that appear and follow the directions provided. If you clicked the bottom option titled “**More results for change fonts**,” several additional selections (hyperlinks) will appear in the right window pane offering focused instructions on various font editing functions.
 - e. Now practice changing the font style and font size of the document.
 - f. If the information was not helpful, click in the **white search text box** located at the top of the Help screen and type **Change font size**. Continue using Search box until you find the help needed.
 - g. Click the **Close** icon to exit the Help screen.

Do you prefer looking at a list of Help topics to choose from or did you prefer using the Search box for more detailed searches? Explain why.

2. Find assistance to Get Help when working in Microsoft PowerPoint.
 - a. Open **PowerPoint application** and select a **blank presentation**.
 - b. When the blank presentation opens find the **Light Bulb** or **Magnifying Glass** icon and **Tell me what you want to do** text box on the ribbon. Click in the box and type **Design ideas** then press **Enter**. If this is the first time using Help in PowerPoint, you may be asked to “Turn on” this level of support prior to seeing design options. If you are using Office 365, a pane will open on the right with several design ideas to choose from which are different from the templates provided when the PowerPoint application is first opened. If you are using Office 2019, you will see a list of topics to choose from. Select a topic or design of your choice.
 - c. Next, click in the **Tell me what you want to do** text box, but this time select **Change slide background** option from the drop-down list. Notice the drop-down menu changes to offer more selections.
 - d. Click **Smart Lookup on Change Slides**. If this is the first time using Smart Lookup, you will have to turn on functionality when prompted by clicking **Turn on** button. Several web-based/hyperlink options appear to the right of the screen to search Wikipedia, Bing Images, or other web support sites such as Microsoft Office.

- e. Click **Support.Office.Com** web link option to see how to change the background color of slides. Change the color of the background to your preference.
- f. Close the Smart Lookup window by clicking the Close icon.

What were the similarities and/or differences when selecting the “Get Help” option versus the “Smart Lookup” option? Which option would you recommend using?

3. Obtain additional help by adding **Get Help** icon  to the QAT.
 - a. Open an application.
 - b. On the title bar click the **Customize QAT Arrow** (see Figure 4-3) and click **More Commands**.
 - c. Select **All Commands** from the drop-down box (see Figure 4-11).
 - d. Select the **Help** option  **Help** in list and click **Add** to right side box. You will need to scroll down through alphabetical list to find. Click **OK**.
 - e. The **Get Help** icon now appears in your QAT.
 - f. Before closing the customization pane, consider adding other commands to the QAT.
 - g. Click the **Get Help** icon. When the Help pane opens use the Search box or select options from list to explore information.

Which option do you find more helpful, clicking the **Get Help** icon in the QAT or to use the **Tell me what you want to do** text box? Explain why. If you prefer the Get Help icon on QAT, you will need to add this to each application.

4. Explore more web-based options to find additional help, support, and training in Microsoft Office applications.
 - a. Be sure you are connected to the Internet and open a web browser of your choice.
 - b. In the Search box type **Office 365 or 2019 Training Center** and press **Enter**. Or you can type the URL directly into the box <https://support.office.com/en-us/office-training-center> and press Enter.
 - c. The Microsoft Office training webpage will appear. Click on the application you need assistance with.
 - d. Select one of the numerous training blocks and then select one of the videos or quick tips provided.
 - e. Return to the Office Training Center homepage. Scroll to the bottom and select **Cheat Sheets-Get Now**. Here you will find PDF guides for each Office application for both Windows and MAC systems. Download the guides for future reference.

Exercise 3: Copy and Move Data Using Cut/Copy/Paste and Drag and Drop

Objectives


1. Copy and move text from one place in the document to another using the clipboard.
2. Copy and move text from one place in the document to another using drag and drop.
3. Copy text from one document to another document.

Activity

1. Start an application and enter text or retrieve a previously saved file.
 - a. Open Microsoft Office Word. Click **Start** icon, **scroll down** to find **Word** icon, click to **open**. Or click on **Word** icon found on taskbar or desktop, depending on the computer you are using. **Open a blank document**. Use the default Word setting for font (Calibri, 11 points).
 - b. Type **Understanding how to copy and move data is an important skill that can save the user time**.
 - c. Press the **Enter** key twice.

- d. **Type** the following bolded text: **Below is a list of physicians and their associated specialty. Please use the beeper number to access these physicians during off-hours.** Press **Enter** key once.
- e. Next, type the information listed below. Be sure to press the **Tab** key between each item and the **Enter** key at the end of each row.

Dr. M. Smith	Orthopedics	*4567	Monday/Wednesday/Friday
Dr. K. Bones	Orthopedics	*4512	Tuesday/Thursday/Saturday
Dr. P. Roberts	Oncology	*5678	Sunday
Dr. Z. White	Internal Med	*3489	All week

- f. Click **Save As** from the **File** tab and name the file **Chap4-Exercise4-CM-with-Drag**.
2. Move text using drag and drop.
- Select the **Dr. Smith** line of information. (The quickest way to do this is to place the pointer in the Quick Select area by placing the pointer in the margin to the left of Dr. M. Smith; when the pointer is a right-slanted arrow, **click**.) The line should be highlighted.
 - Place the pointer on the **highlighted** area. Hold down the left mouse button and drag the selection to the **blank line below the “D” in “Dr. Z. White.”**
 - Release the mouse button. “Dr. M. Smith” is now located at the end of the list.
3. Move text using the clipboard.
- Select content, by highlighting the second line of text in the list, which begins with Dr. P. Roberts.
 - Using your mouse, **right-click** over the highlighted area and select **Cut** option. You could also click the **Home** tab on the application menu then the **Cut** icon  in the clipboard grouping. Notice the Cut icon does not become active until you highlight the content to be cut.
 - Click to the left of “**Dr. M. Smith**” so the blinking cursor vertical line is to the left of the “D.” Do not select the entire line.
 - With the insertion point (blinking cursor line) to the left of the “D” in “Dr. M. Smith,” click the **Paste** button from the home tab clipboard grouping or right-click on your mouse and select paste. The list should now look like the one shown in **BOX 4-1**.

BOX 4-1 Results of Moving Text With Drag and Drop

Understanding how to copy and move data is an important skill that can save the user time.

Below is a list of physicians and their associated specialty. Please use the beeper number to access these physicians during off-hours.

Dr. K. Bones	Orthopedics	*4512	Tuesday/Thursday/Saturday
Dr. Z. White	Internal Med	*3489	All week
Dr. P. Roberts	Oncology	*5678	Sunday
Dr. M. Smith	Orthopedics	*4567	Monday/Wednesday/Friday

4. Copy text using drag and drop.
 - a. Go to the **end** of the document (press **Ctrl+End**).
 - b. Press the **Enter** key twice to create two blank lines.
 - c. Type the **following information**, remembering to use the Tab key between items and the Enter key to go to the next line.

Chris Walker	Nursing Assistant
Mary Robb	Registered Nurse
Lee Dock	Nurse Practitioner
 - d. Click **Save**.
 - e. Select the **first line of text** in this list (“**Chris Walker**” through “**Assistant**”).
 - f. Place the pointer over the **selected text**.
 - g. Hold down the **Ctrl** key and the **left mouse button**, and drag the text so that the broken vertical bar is to the left of “**Mary**.”
 - h. Release the **mouse button** and then the **Ctrl** key. The text is copied.
 - i. Highlight **Chris** in the second row, and type **Brian**.
5. Copy text using the clipboard.
 - a. Select the text from “**Mary Robb**” through “**Registered Nurse**.”
 - b. Click **Copy**.
 - c. Move the pointer to the left of the “L” in “Lee Dock” and click. Do not highlight the text.
 - d. Click **Paste**.
 - e. Highlight the second **Mary** and type **Nancy**.
 - f. Click **Save** to save the document.
6. Copy text from one document to another.
 - a. Select all the **text** from “**Chris**” through “**Practitioner**.”
 - b. Click **Copy**.
 - c. Click **File** tab to open a **New** document or click **Ctrl+N**.
 - d. With the new document opened, click **Paste**. The text is now inserted into a new Word document.
 - e. Save the document as **Chap4-Exercise3-CMwithClipboard2**.
7. Copy text from one application to another.
 - a. Click **Start** icon, scroll to find **Excel**, and open a blank workbook (or use one of the shortcut techniques to open Excel).
 - b. With the cursor in Cell 1A of Excel worksheet, click **Paste**. The contents previously saved when working in Word are still on the clipboard and are now inserted into an Excel worksheet. Columns will need to be enlarged to see all the data. Names should be in column A and Job title in column B unless you added two tabs between items forcing the Job title to column C. There is more on tabs and their settings in chapter 5.
8. Close all **files** and **programs**. There is no need to save anything again unless requested to do so by your professor.

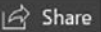
Exercise 4: Saving and Sharing Files in the Cloud

Objective

1. Practice collaborating with others in saving, sharing, and editing a document in the cloud.

Activity

This activity requires you to have access to cloud storage such as OneDrive, Dropbox, Google Drive, or iCloud.

1. **Open** the Chap4-Exercise3-CMwithClipboard2 file, click **File** tab, **Save As**, and then rename as **Collaborative Working Document** and save to OneDrive folder.
2. Click the **Share icon**  located on right side of ribbon (see **FIGURE 4-26**).
3. Invite two people to view and edit your document. Type both **email addresses** (placing semicolon between each) in the text box. You could also search the address book if updated. A new drop-down box appears to grant users the ability to view only or to view and edit. Select **Edit**, enter a brief message to be included in the email, then click **Share**.
4. You can also share with a group of people at one time. Click on **Share** found on the menu. When the Share dialog box opens, click **Get a sharing Link** found at the bottom of the box. You will be provided with two links, one allowing others to view only, and one allowing others to view and edit. Click **Copy**, then open email, select the group of recipients, and paste the link in the email.
5. As others collaborate in editing the document you will be able to view various versions by date and time. Click the Version History icon found next to Share. Remember, there is no need to save your work when sharing documents via the cloud. The system automatically saves every few seconds.

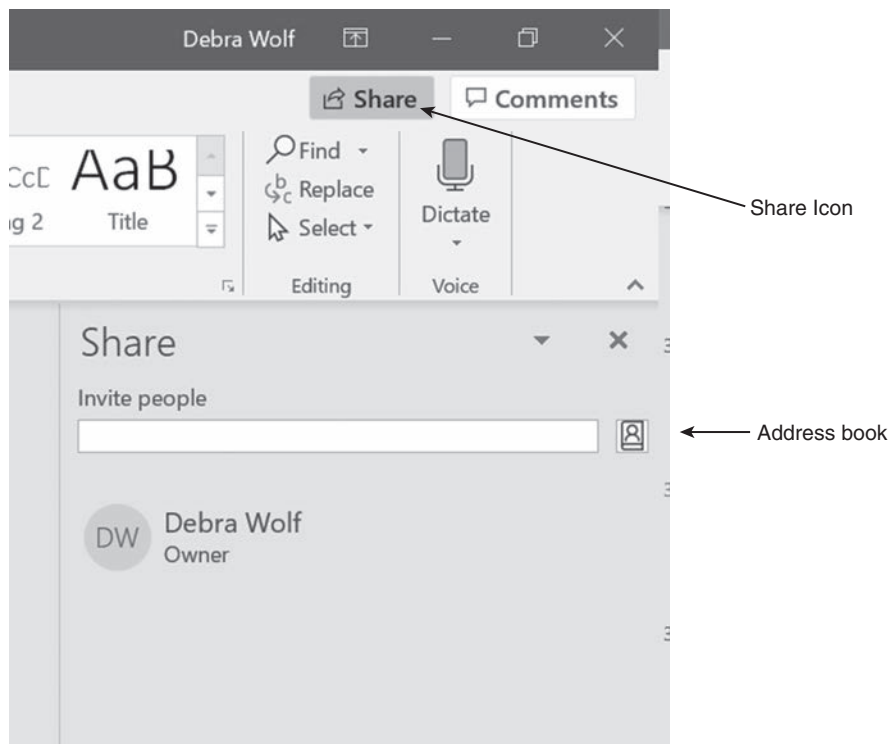


FIGURE 4-26 Sharing a Document via Cloud Storage

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Assignments

Assignment 1: Using Help Versus Tell me what you want to do Option

Directions

1. Open the Excel application. Click the **Help** icon via the QAT (you may need to add if you have not done so already). Click the **Tables & Charts** option in the Help dialog box. Review the information provided and then **Close** the Help dialog box.
2. Click the **Tell me what you want to do** box. Type **Table & Charts** in the text box. Explain what happens. How did you find information you needed? Explain which Help tool did you preferred and why. Print one or two Help screens for future reference.
3. Using Word, Excel, or PowerPoint, find out how to insert a SmartArt diagram in a Word document, Excel spreadsheet, or PowerPoint presentation. Use the various processes to obtain Help. Learn how to complete this task in each application. Print the Help screen used to insert SmartArt into a PowerPoint presentation.
4. Submit the printouts from Steps 2 and 3 as directed by your professor.

Assignment 2: Finding Additional Help

Directions

Sometimes Office Help does not provide information in a manner understandable to the user.

1. Select a topic from this chapter (or something you always wanted to know how to do in Office). Use the Internet to search for a user guide, directions, or a video on the selected topic. Do not use Microsoft's website.
2. Provide your classmates with the URL (link) to the directions you found and a reason why this is a great source for learning that concept.
3. Submit your work following the directions provided by the professor.

Assignment 3: Copy and Move Text

Directions

1. Create a one-page document describing how to perform the following tasks using a desktop or laptop computer. Each description should take the form of its own paragraph in the document. Type your name on the document.
 - Save a document.
 - Print a document.
 - Create a new document.
 - Move text in a document.
2. Save the original document as **Chap4-Assign3-CM-LastName** and then print it.
3. Using the move text feature of the program, rearrange the text as follows:
 - Create a new document.
 - Move text in a document.
 - Save a document.
 - Print a document.

4. Save the document as **Chap4-Assign3-CMRev-LastName**. Print the revised document. Submit both documents in either print or electronic form.
5. Share one of the documents via cloud storage with instructor, granting edit privileges.

Assignment 4: Using Microsoft Office Applications on an iPhone, iPad, or Android

Directions

As health systems and organizations continue integrating electronic devices, health professionals will be required to use devices other than desktop computers and laptops (such as iPads, iPhones, and Androids) to open, review, edit, and save Office files. To complete this assignment, you must have the Microsoft Office mobile apps (Word, PowerPoint, or Excel) downloaded on your iPhone, iPad, or Android device. To download the apps for free, go to Microsoft Office (<https://products.office.com/en-us/mobile/office-mobile-apps-for-ios> or <https://products.office.com/en-us/mobile/office-mobile-apps-for-android>) or you can use the App Store options on your mobile device. Go to Microsoft Office Support if assistance is needed in downloading and using the mobile apps.

1. Confirm you have Office mobile apps on your device or download as noted above.
2. Using an iPhone, iPad, or Android, open the file titled **Chap4-Assign3-CMRev-LastName** or **Chap4-Assign3-CM-LastName** you created in Assignment #3 and saved in cloud storage. If you do not have cloud storage, and you can access your email on your iPhone, iPad or Android, you can email the file to yourself using a desktop computer or laptop.
3. Using the iPad, iPhone, or Android, add a second page to the document describing (1) the device (iPad, iPhone, or Android) you are using to open, view, and edit the file; and (2) how to perform the following tasks using your iPad, iPhone, or Android. Each description should take the form of its own paragraph in the document.
 - Save a document, noting differences from using a computer.
 - Print a document, noting differences from using a computer.
 - Create a new document, noting differences from using a computer.
 - Move text in a document, noting differences from using a computer.
4. Now, open a different Office application such as PowerPoint or Excel using your iPad, iPhone, or Android and create a new document. Explore the application's functionality by adding data, formatting data, cutting and pasting data, etc. Compare differences from using a computer. Add a final paragraph to the end of the document describing three differences you noted in using the application on the iPad, iPhone, or Android versus a computer.
5. An optional step to consider is to take a screenshot on the iPad, iPhone, or Android of one of the documents you were editing and insert the image at the end of the paper. To take a screenshot on an iPhone or iPad simultaneously press the sleep/wake button (also known as the on/off button on side of device) and the home button (circular round button on front of device) at the same time. To take a screenshot on an Android, wake up the phone if necessary, press camera icon, and then the circular round white button on the front, at the bottom of the screen.
6. Save the document as **Chap4-Assign4-CM-Lastname**. Follow the professor's instructions on how to submit the file or which cloud storage space to save to. If saving to a cloud, be sure to grant editing privileges to the professor.

